

Hire. Retain. Better.

# The Ultimate Reference Check Template





## Planning is the key to reference check success

Like most desired business outcomes, teams don't achieve success without proper preparation and strategy. A company's hiring process is a means to the business outcome of improving quality of hire (Quality of hire is longer than average retention and better than average performance). Reference checking is an invaluable part of the hiring process when done right, and as such requires careful planning. Before a reference check is conducted, the entire hiring team needs to know what they hope to get out of it.

Getting honest, actionable feedback from references is tricky since most references are hand-picked by the candidate because they know their reference will give them a glowing review. To get to know a candidate in a meaningful way, a hiring team needs to know the culture and team dynamic first, so they can focus on mining for those attributes and behaviors with references.

### HERE ARE JUST A FEW QUESTIONS THAT HIRING TEAMS NEED TO ASK THEMSELVES:

- ▶ *What is our company culture? Do we do more family picnics as an organization or happy hours?*
- ▶ *What are the top reasons for voluntary churn for previous employees on this team?*
- ▶ *What type of manager will our new hire report to? Autocratic? Democratic? Consultative?*
- ▶ *How many projects or responsibilities might our new hire be required to manage at once?*
- ▶ *What soft skills are required for this role? Will they be presenting to executives? Will they be writing process documents?*

Of course a reference is going to say that their candidate is a great marketer or a whiz at coding. But they often are more willing to be transparent about a candidate's social habits, their writing skills, or leadership ability. Frame the reference call as a chance to help set up the candidate for success in their potential new role. It's paramount a recruiter and hiring manager know the environment and culture they are bringing a new hire into so they can ensure that have the personality and skills to thrive in the organization, not just that the candidate has the technical skills to do the job.



## Tips for conducting meaningful reference checks

Understanding what questions need to be answered about a candidate through reference checking to ensure a higher quality of hire is only part of the solution. How to get actionable insights and meaningful candidate intelligence from a hand-picked reference is the hard part. To get there, follow these tips and use Crosschq's reference survey template.

- ✓ **Conduct a reference survey versus having a conversation about the candidate.** Surveys keep the reference call concise and efficient, while keeping the focus on the specific questions that need to be answered.
- ✓ **For each role, give all references the same survey, without fail.** This will make it easier to consolidate feedback and compare results.
- ✓ **Don't try to interpret qualitative feedback.** Transcribe responses to open questions, if any, verbatim if possible. Don't guess what a reference's tone implies, or what a pause before an answer infers. This will not only keep unneeded opinion out of the results, but it will go a long way in reducing unconscious bias that can be injected into the hiring process.
- ✓ **Recruiters and hiring managers must work together to build the survey.** Recruiters will know what technical skills are required and have a good handle on company culture, the hiring manager will understand the team's dynamic, what type of manager they are, and the types of personalities they work well with.



Reference Checking Template

Candidate Name:
Job Title:
Department:
Hiring Manager:
Recruiter / HR Team Member: (Person conducting the reference check)

Table - stakes Reference Questions	Reference 1	Reference 2	Reference 3	Reference 4	Reference 5	Reference Avg.
Describe the role, then ask... On a scale of 1 - 5, do you think the candidate would be a fit for the role?						
On a scale of 1 -5, would you say the candidate is an ethical person?						

On a 1 - 5 scale with 5 being the best, please rate the candidate's attributes and behaviors.						
Employee Attributes	Reference 1	Reference 2	Reference 3	Reference 4	Reference 5	Reference Avg.
Enjoyable to work with						
Optimism						
Handles stress well						
Willingness to go above and beyond						
Attention to detail						
Adaptability or Add your own						
Creative thinking or Add your own						

On a 1 - 5 scale with 5 being the best, please rate the candidate's soft skills.						
Soft Skills	Reference 1	Reference 2	Reference 3	Reference 4	Reference 5	Reference Avg.
Project management						
Presentation skills						
Written communication skills						
Lead cross -functional team						
Working within a team						
Conflict managment or Add your own						
Process development or Add your own						

On a 1 - 5 scale with 5 being the best, please rate the candidates team skills.						
Team Member Attributes	Reference 1	Reference 2	Reference 3	Reference 4	Reference 5	Reference Avg.
Work effectively with little direction						
Self -starter						
Takes feedback well						
Provides feedback In a positive way						
Listening to others						
Delegating or Add your own						
Time management or Add your own						

# Reference Checking Template

Candidate Name:
Job Title:
Department:
Hiring Manager:
Recruiter / HR Team Member: <i>(Person conducting the reference check)</i>

On a 1- 5 scale with 5 being the best, please rate the candidate's role specific skills.						
Job Skills	Reference 1	Reference 2	Reference 3	Reference 4	Reference 5	Reference Avg.
Ability to create a product story	<i>(Sample question for a product marketer)</i>					
Consistent quota attainment	<i>(Sample question for a sales rep)</i>					
High customer satisfaction score	<i>(Sample question for a customer success manager)</i>					
Job site safety record	<i>(Sample question for a construction manager)</i>					
Experience with Java	<i>(Sample question for a software developer)</i>					
Ability to tie KPI to business outcomes	<i>(Sample question for a data analyst)</i>					
Consistent delivery of quality candidates	<i>(Sample question for a recruiter)</i>					

In 3 words or short phrases, please describe the candidate's greatest strengths.						
Strengths (Qualitative)	Reference 1	Reference 2	Reference 3	Reference 4	Reference 5	
Strength 1						
Strength 2						
Strength 3						

In 3 words or short phrases, please describe the candidate's areas for improvement.						
Team Member Attributes	Reference 1	Reference 2	Reference 3	Reference 4	Reference 5	
Needs improvement 1						
Needs improvement 2						
Needs improvement 3						

Any additional feedback you want to share? (Only open - ended question)						
Additional Feedback	Reference 1	Reference 2	Reference 3	Reference 4	Reference 5	
Qualitative feedback						

## Crosschq can automate your reference checking process

Crosschq's cloud-based, automated reference checking solution has saved hundreds of organizations thousands of hours by creating efficiencies in their hiring processes. Here are just some of the features:

- Libraries of role and title specific surveys
- Organic talent sourcing through a reference referral network
- Easy integrations with ATS and HRIS partners to fit into existing workflows

Diversity & Inclusion	<b>32%</b>	Increase in diversity by removing unconscious bias.	<b>Dan Collins</b> Director, Talent Acquisition
Save Time	<b>92%</b>	Reduction in time spent conducting references.	<b>Meredith Herberg-Waldron</b> Global Talent Operations
Source New Talent	<b>46%</b>	Opt-in rate of references to talent pool.	<b>Kirk Okenquist</b> Director, Talent Acquisition

**Are you ready to re-imagine reference checking and utilize robust talent analytics to build better teams?**

Get a customized walk through from a team expert today.

[Book a Demo](#)