



**Ivy Consulting  
Group**

## 7.02 Staff Development & Team Building

**Hire the Right People**  
*And Teach Them the  
Right Things to Do*

"Changing Lives One Workplace at a Time"



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# Hire the Right People

If you have been responsible for hiring decisions for more than a few, you've probably made more than a few hiring mistakes. And that's ok; we all do. But, looking back at those mistakes today, do you know what you missed? The candidates met your company's entry-level requirements and seemed motivated and skilled, yet they didn't perform to your expectations. Being able to master the art of spotting talent and hiring the right people is one of the most critical skills you must develop to run a successful business.

In June 2021, writers at the Harvard Business Review reported over 9 million open jobs in the US, which is a record high. While at the same time, reports show that the US continues to experience higher unemployment numbers and insist on a continued labor shortage (Sanandaji et al., 2021). The disruption caused by the Covid-19 pandemic has impacted the labor market, causing a severe talent gap and forcing even the most advanced HR teams to rethink their people strategy.

From shifts in how employees measure success and how they are treated, to how employers measure profitability and accountability, the only thing for certain is that yesterday's recruiting strategies will not solve tomorrow's recruiting needs. To successfully solve the talent gap, well-established companies must throw out bureaucratic and outdated HR policies or lose the brightest and most motivated younger workers to startups that value an entrepreneurial spirit, flexibility, and a workplace that rewards contribution.

The question is, "How do you develop systems that will help recruiters spot talent and make better hiring decisions?"

The answer has to do with many things, including how past experiences and emotions that are tied to them influence our decision-making process. However, while experience can be a good source of information, we must realize that our assumptions could be far from reality. Take a moment to look back at the people you have hired and consider the following questions:

1. What characteristics set the great employees apart from the not-so-great?
2. Were there red flags that you should have noticed or ignored?
3. What additional data sources could you have used to help you make a better decision?

Looking back through my data, I have identified what to look for when hiring sales representatives. Contrary to what many may think, it was not IQ, emotional intelligence, education, or even experience in the same industry that predicted success. Instead, it was an internal drive and passion that was most important. Furthermore, they understood how the position I offered would help them get what they wanted out of life.

Whatever you find to be the most accurate predictor of success in each job opening, you must find a way to identify these factors early in the interview process. And to attract great talent, you must listen to the needs of the candidate and inspire them to join your team. This Lesson Plan will do just that - help you spot talent, hire the right people and teach them the right things to do!



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## Your Recruiting Process

Most business owners know that business growth depends on finding the right people to staff an expanding organization. Yet, in some companies, more time is wasted on dealing with poor performers than developing an effective recruiting process. And if your company relies on innovation and excellent customer service, finding great people cannot be left to chance.

Let's revisit the earlier concept of why hiring good people is essential. Besides the apparent reason of wanting people who will do a good job and provide a positive atmosphere, you also want a solid team. In addition, you want to know, with confidence, that the necessary work is getting done. Having a knowledgeable and dependable staff that genuinely cares about the success of your business can be the difference between a happy life and a miserable one.

Unfortunately, becoming an expert recruiter does not come naturally for most. They often wonder where to find quality candidates. And when they do, how can they become the energetic and passionate leader that great talent demands? And where do you find the time? Do you meet with everyone who responds? Who selects the most likely candidates?

Once you've spent a little time developing your professional recruiting system, you will find it's not as difficult as it seems. Your experience developing marketing and lead generation systems gives you the tools you need to create your recruiting strategy. In addition, the mechanics of a structured interview can seem almost automated, which will leverage your time and bring objectivity to the process. Once you know what questions to ask and what systems to develop, your recruiting process will be streamlined, professional, and straightforward.

## A Thought for Small Business Owners

Is your business providing you with the success that you had hoped for? Does it provide you joy and the freedom to do the things you love to do? If not, perhaps you should consider looking at your business through a different lens. If you find yourself selling, making a product, or servicing a customer, you haven't created a business; you've created a job! Your business is supposed to be the vehicle that allows you to live the life you've always wanted – not a place to go to work.

Instead of doing the work every day, perhaps you find a way to become a professional recruiter, motivator, and trainer of people. Then, when you master those talents, you will not be required to be in the office to make your company run.

*More information on creating a self-running business can be found in Lesson Plans 3.05 and 3.06.*

## Personality Assessments in Hiring

With all of the negative attention in the media about using personality assessments in hiring, you may wonder if there is a place for testing in the workplace. I suppose the answer is “yes,” but only if used appropriately. To make a somewhat strange but similar analogy, unless you are the type of person who would thrive in a relationship set up on the reality show “Married at First Sight,” it’s doubtful you would get married to someone simply because your Match.com believes you should. Or, if you refuse to go on a date with someone unless your match profile recommends, you may miss out on a great life partner! The same is true of personality assessments in hiring. Use a test to gain valuable insight, but never rely on it to make your hiring decisions!

Regardless of the test creator’s claim to reliability and validity, the results of a personality assessment should only stimulate conversation and investigate potential “red flags,” ...period! To illustrate my point, I reflect on 2001 when I hired an experienced outside sales rep to sell life insurance and financial services. For the sake of privacy, I will call him Jimmy. As always, I interviewed six to seven people before I hired Jimmy and even had him complete an extensive online profile before offering him a contract. He was smart, very well-spoken, and highly professional.

Jimmy had worked for a life-only insurance company and appeared to do very well. Throughout the interview process, his competitiveness and passion were apparent, and I thought he was the perfect candidate. Unfortunately, the online profile did not agree. The assessment report revealed that Jimmy might have difficulty accepting instruction, was neurotic, and aggressive. The report also indicated that he worked best alone and may not work well with others. Well, as luck would have it, he could sell, and I desperately needed a new sales producer. Several members of my team met with Jimmy and agreed with my recommendation. I hired him after the second interview.

Nine months later, Jimmy had run off two excellent employees, and several others threatened to do the same. I couldn’t believe it. How could this guy interview so well, and why couldn’t I see it? To this day, I have no idea how much this mistake cost me in the long run. My advertising and recruiting expenses alone cost me well over \$3,000. In addition, we spent 100 hours or more training him and provided an office with a six-month guarantee. The recruiting expenses are in addition to replacing two employees, the deteriorating morale in the office, lost sales opportunities, and lost time! If I had paid closer attention to the profile and asked the right questions, I would have avoided this hiring nightmare.

## Good Interviewing Practices

Think about the latest interview you conducted and consider the following questions:

1. When you conduct an interview, do you know the background, personality traits, and experiences a candidate should have to give them the best chance of success?
2. How many candidates do you interview before you hire one?
3. Is your interview structured in a way that is consistent and measurable?
4. Are you confident your interactions with job candidates do not violate employment or civil rights laws?
5. Do you document each interview and make a thorough evaluation after each meeting?
6. Are the members of your team reflective of the members in your community?
7. Could incorporating a new training program that encourages a more inclusive and diverse team be beneficial to your business?

Not only is maintaining a diverse, equitable, and inclusive workforce the right thing to do, failure to incorporate accountability systems in your office can lead to discrimination lawsuits (see Exhibit A: Guide to Legally Permissible Interview Questions and Discussions).

## Understanding Personality Traits

Before you sit down to conduct your next interview, you should consider the personality traits of the most successful employees in the same job. Were they open to new ideas or rigid, introverted or extroverted, detailed or creative, controlling or agreeable, compassionate or neurotic, competitive or relaxed, confident or need to be nurtured? Understanding what it takes to succeed in a position is essential to the recruiting and selection process.

NOTE: Lesson Plan 5.4 Personality Tests and Hiring Assessments takes a deep dive into research and basic statistical methods to help you select your best hire.

## The Five-Factor Model

Research has shown that there are thousands of identifiable and measurable personality traits. However, experts in the field of psychology believe all traits fall into five basic dimensions. Known as the “Big 5” (Costa and McCrae, 2003), the test consists of fifty items and takes 3 – 8 minutes to complete. When taking the assessment, participants rate each item as to how the word or phrase describes them as a person. While there are no “right” or “wrong” answers, the results provide valuable insight into how a person will respond in a given situation. The five factors are extraversion, agreeableness, openness, conscientiousness, and neuroticism. The Big Five is the only psychometric test and personality model to gather scientific consensus in personality psychology.

The definitions below may help give you a better understanding of how personality traits affect work performance.

- **Detail-Oriented:** Many engineers and accountants fit this profile. While a detailed individual can become successful, this person will usually start slow and miss many opportunities to close a sale. A detailed person usually has to know everything there is to know about the product before he or she can begin the marketing process. While a detailed individual may not fit well in a sales role, he or she may do well in an administrative or customer service position.
- **Controlling:** Many detail-oriented people are also controlling and want to handle each process in a particular manner. Although a controlling individual can become a superstar sales performer, they usually have a hard time delegating work, and with this trait, success can be limited.
- **Driven/Competitive and Passionate:** These qualities set most top sales performers apart. When interviewing potential sales employees, look for an internal drive combined with a passion for success.
- **Aggressive Personality:** Most successful sales reps are aggressive. Submissive candidates often find it difficult to close a sale and have call reluctance.
- **Empathetic:** Sales reps that are empathetic develop stronger relationships with their clients and their employees. The ability to understand the attitude of others is a tremendous asset in the sales profession.
- **Confident:** A sales rep who is not confident in his or her ability will have a hard time facing rejection and may be better off finding a comfortable job that does not rely on performance-based pay.
- **Results Oriented:** Prospects who set goals and focus on results will often perform better than those who do not.

- **Positive Outlook:** Although I've seen some very negative top performers, I would rather take less income and hire an average sales rep with a positive attitude. A negative person can bring down an entire team. Fortunately, this trait is the easiest to spot during an interview.
- **Need to Be Nurtured:** This trait may not make or break a sales representative; however, I thought it was worth mentioning because this type of person will require more of their attention than most. People who have this trait need constant attention and receive praise for a job well done.

**Additional characteristics to look for when hiring sales professionals include:**

- Is the candidate competitive?
- Do they demonstrate desire, drive and set goals to become highly successful?
- Do they believe in the products you sell?
- What research did they conduct about you and your company before coming in for an interview? Or did they research at all?
- Is the candidate leaving their prior position on good terms? Ask about every job on the candidate's resume. Ask about their responsibilities, the training program, and why they left. Look for positive or negative indicators.
- Why are they looking for a new position today?
- Are they confident in their abilities and open to new ways of doing things?

**FINAL NOTE:** If you are interviewing someone for a commission-only position, the candidate must have a stable financial background and a supportive partner. Because of the expected delay in receiving compensation, financial difficulties can strain relationships and the cost of failure severe. If this is the case, realize your responsibility as a professional recruiter and do the right thing.



**Do your ads attract the right type of person for your job?**

Make sure your advertisements attract candidates who have the characteristics of top performers. Often we use ads that state: "A college degree or management experience required." A potential top performer may not even respond. On the other hand, if you would have advertised that you are looking for candidates who "have a proven track record of prospecting," you may attract aggressive candidates who are willing to do whatever it takes to become successful.

## Seven Steps of Your Recruiting Process

Your recruiting process can be broken down into seven basic steps.

**1 Define the position and the ideal candidate.** Know the traits, characteristics, and experiences that will give your new team member the greatest chance for success.

**2 Document your interview process.** Your entire interview process, and any process in your business, should be documented in an organized procedure guide. You will never be free from work demands if you rely on your experiences and memories to handle routine task assignments.

**3 Create a structured interview.** Be a professional and master the art of interviewing. A structured interview will keep you on track, provide consistency, and help you build a fair and inclusive interview process.

**4 Develop your recruiting strategy.** Know where to find the highest quality candidates and interview at least six candidates for every position. Make sure your recruiting message appeals to your best candidates. What are they looking for, and why would they consider working for you?

**5 Conduct your interviews.** The more interviews you conduct, the more effective you will become at inspiring others to join your team and identify talent. Your interview process should consist of at least two interviews, including key staff members, a testing method, and a reference checker. Quick follow-up is key.

**6 Collect data.** Use a spreadsheet to track all relevant candidate data. This spreadsheet will be used to improve your structured interview with future candidates (see *Lesson Plan 5.03 Personality Tests and Hiring Assessments*).

**7 Refine the perfect candidate.** As new candidates are hired, you will document each performance and look for similarities between the highly successful and low-success groups.



## Putting it All Together

Now that you have the framework for your professional recruiting system, it's time to develop your recruiting skills to attract and retain the highest quality candidates. How does your opportunity appeal to the "new workforce."

According to the Harvard Business Review, a study of over 2,000 knowledge workers in the US (Minahan, 2021) found that when searching for a new position post covid:

- 88% of workers say they are looking for complete flexibility in their work hours and location.
- They want to work on a diverse and accepting team.
- They prioritize learning and expect to be trained.
- They expect employers to use technology that can measure productivity and be valued for what they deliver, not the volume.
- And they expect to be given the space and trust they need to do their best work.

But here is the gap; with only 69% of HR directors saying their company plans to operate in this way, and less than half believe workers can be more productive in a home setting, it is doubtful that employers will cater to these demands. And while some employers will retain a work-from-home or hybrid work environment, the increase in costs has forced most executives to rethink spending. The cost reductions have already been seen through massive layoffs in the service and tech industries. With a new corporate strategy, executives hope to replace low-performing workers with a more talented, tech-savvy, and motivated workforce.

What does this mean for your business?

Do adjustments need to be made?

**If you are not working with a Certified Ivy Consulting Group consultant,  
you should be!**

Reach out today for a free, no-hassle consultation. Let us demonstrate how we can help you overcome some of our biggest frustrations and help you create a business that gives you a better life!

## Appendix A – Guide to Legally Permissible Interview Questions and Discussions

As a small business owner, you must be mindful of federal and state laws against discrimination in the workplace. These laws protect both candidates and employees.

### So, what are they?

The Equal Employment Opportunity Commission (EEOC) enforces federal laws that prohibit discrimination. These laws include the:

- Equal Pay Act of 1963
- Civil Rights Act of 1964
- Age Discrimination in Employment Act of 1967 (ADEA)
- Americans with Disabilities Act of 1990 (ADA)
- Civil Rights Act of 1991
- Genetic Information Nondiscrimination Act of 2008 (GINA)

Another federal law that protects individuals is the:

- Fair Credit Reporting Act (FCRA)

Some states also enforce further protections for workers against discrimination, including:

- Salary history laws by state
- Ban-the-box laws by state
- Equal pay laws by state

Not all employers are required to follow each of these laws. For example, the Civil Rights Act, ADA, and GINA only apply to employers with 15 or more employees. And the ADEA only applies to employers with 20 or more employees. Make sure to check with your state for specifics on state discrimination laws.

It is important to remember when designing interview questions—and throughout all your interactions with job candidates—that your aim is to find a qualified person to fill a position. Employment and civil right laws protect job-seekers from being excluded because of factors unrelated to their qualifications.

**IMPORTANT:** All settings where you interact with job candidates, including informal gatherings with any members of your organization—even those who are not on the interview team—are considered to be part of the interview. Everyone who will have contact with candidates should understand which areas are appropriate for questioning and discussion.

## Appendix A continued

Topic	Cannot Ask	Can Ask
<b>Address/Length of Residence</b>	<ul style="list-style-type: none"> <li>About foreign addresses that would indicate national origin (such as birthplace)</li> <li>Names or relationships of people with whom applicant lives</li> <li>Whether applicant owns or rents</li> </ul>	<ul style="list-style-type: none"> <li>How long have you lived in (city, town)?</li> <li>Phone number and other contact information</li> </ul>
<b>Age</b>	<ul style="list-style-type: none"> <li>Age or date of birth</li> <li>Questions that would tend to identify persons who are 40 and older ("Do you remember being at work before e-mail was introduced?")</li> </ul>	<ul style="list-style-type: none"> <li>If a minor, require proof of age in the form of a work permit or a certificate of age</li> <li>If age is a legal requirement, can ask, "If hired, will you be able to furnish a proof of age?"</li> </ul>
<b>Arrest and Conviction</b>	<ul style="list-style-type: none"> <li>Have you ever been arrested?</li> </ul>	<ul style="list-style-type: none"> <li>If you wish to ask about someone's criminal record, consult your HR Consultant</li> </ul>
<b>Attendance, Reliability</b>	<ul style="list-style-type: none"> <li>Number and/or ages of children?</li> <li>Who is going to baby-sit?</li> <li>What is your religion?</li> <li>Do you have pre-school age children at home?</li> <li>Do you have a car?</li> </ul>	<ul style="list-style-type: none"> <li>What hours and days can you work?</li> <li>Are there specific times that you cannot work?</li> <li>Do you have any responsibilities that will interfere with specific job requirements such as traveling?</li> </ul>
<b>Citizenship/ National Origin</b>	<ul style="list-style-type: none"> <li>What is your national origin?</li> <li>Are you native-born or a naturalized citizen?</li> <li>Where are your parents from?</li> <li>What is your maiden name?</li> </ul>	<ul style="list-style-type: none"> <li>Are you authorized to work in the United States?</li> <li>Have you ever worked under a different name?</li> </ul>
<b>Credit Record</b>	<ul style="list-style-type: none"> <li>Do you own your home?</li> <li>Have your wages ever been garnished?</li> <li>Have you ever declared bankruptcy?</li> </ul>	<ul style="list-style-type: none"> <li>No questions.</li> </ul>
<b>Disabilities, Handicaps, Illness</b>	<ul style="list-style-type: none"> <li>Do you have any (job) disabilities?</li> </ul> <p>May not ask:</p> <ul style="list-style-type: none"> <li>About the nature of or severity of a disability/handicap;</li> <li>What happened to you?</li> <li>How will you get to work?</li> <li>What sort of treatment do you need?</li> <li>Have you ever been addicted to illegal drugs or treated for drug or alcohol abuse, ever received workers compensation, or been hospitalized/ treated for physical or mental health conditions, or ever been absent from work due to illness?</li> <li>Will you need accommodations?</li> <li>What Kind of accommodations will you need?</li> </ul>	<ul style="list-style-type: none"> <li>Can you perform the duties of the job you are applying for (describe duties to candidate)? How would you perform this particular task?</li> <li>State the attendance requirements and ask if the applicant can meet them. Can you meet the attendance requirements?</li> <li>What was your attendance record at your prior job?</li> </ul> <p>• Wait until the candidate requests or mentions an accommodation before discussing the topic of accommodations (it's the candidate's responsibility to make a request for accommodation).</p>
<b>Worker's Compensation</b>	<ul style="list-style-type: none"> <li>Have you ever filed for worker's compensation?</li> <li>Have you had any prior work injuries?</li> </ul>	<ul style="list-style-type: none"> <li>No questions.</li> </ul>

## Appendix A continued

Topic	Cannot Ask	Can Ask
<b>Education</b>	<ul style="list-style-type: none"> <li>When did you graduate from high school or college?</li> </ul>	<ul style="list-style-type: none"> <li>Do you have a high school diploma or equivalent?</li> <li>Do you have a university or college degree?</li> <li>What academic, professional, vocational schools did you attend?</li> <li>Can you provide us with an official transcript?</li> </ul>
<b>Gender</b>	<ul style="list-style-type: none"> <li>Do you wish to be addressed as Mr., Mrs., Miss?, or Ms.?</li> <li>What is your maiden/birth name?</li> </ul>	<ul style="list-style-type: none"> <li>Generally, no questions may be asked about gender unless gender is a bona fide occupational qualification (e.g. locker room attendant).</li> </ul>
<b>Language</b>	<ul style="list-style-type: none"> <li>What is your native language?</li> <li>Inquiry into how candidate acquired ability to read or write or speak a foreign language.</li> </ul>	<ul style="list-style-type: none"> <li>What languages do you speak and write fluently? (If the job requires additional languages.)</li> </ul>
<b>Military Record</b>	<ul style="list-style-type: none"> <li>What type of discharge did you receive?</li> </ul>	<ul style="list-style-type: none"> <li>What type of education, training, work experience did you receive while in the military?</li> </ul>
<b>Organizations</b>	<ul style="list-style-type: none"> <li>List all clubs, societies and lodges to which you belong.</li> </ul>	<ul style="list-style-type: none"> <li>Inquiry into candidate's membership in organizations which the candidate considers relevant to his or her ability to perform job.</li> </ul>
<b>Parental Status</b>	<ul style="list-style-type: none"> <li>Inquiry into whether candidate has children, plans to have children, or has child care arrangements.</li> </ul>	<ul style="list-style-type: none"> <li>May ask if candidate can meet specified work schedules or has activities, commitments, or responsibilities that may prevent him or her from meeting work attendance requirements. If such questions are asked, they must be asked of both sexes.</li> </ul>
<b>Physical Features</b>	<ul style="list-style-type: none"> <li>It is illegal to ask about weight, height, impairment or other non-specified job-related physical data.</li> </ul>	<ul style="list-style-type: none"> <li>No questions.</li> </ul>
<b>Race or Color</b>	<ul style="list-style-type: none"> <li>Complexion or color of skin.</li> </ul>	<ul style="list-style-type: none"> <li>No questions.</li> </ul>
<b>Reference Checking</b>	<ul style="list-style-type: none"> <li>What is your father's surname?</li> <li>What are the names of your relatives?</li> </ul>	<ul style="list-style-type: none"> <li>By whom were you referred for this position?</li> <li>Names of people willing to provide references.</li> </ul>
<b>Religion or Creed</b>	<ul style="list-style-type: none"> <li>Inquiry into candidate's religious denomination, religious affiliations, church, parish, pastor or religious holidays observed.</li> <li>Willingness to work any particular religious holiday.</li> </ul>	<ul style="list-style-type: none"> <li>Can advise candidate about normal hours and days of work required by the job to avoid possible conflict with religious or other observances.</li> </ul>
<b>Sexual Orientation</b>	<ul style="list-style-type: none"> <li>No questions.</li> </ul>	<ul style="list-style-type: none"> <li>No questions.</li> </ul>