# Interview Plan Template

**Purpose of this Template:**

* This template is designed to help hiring managers and interview panels create a clear, structured, and equitable interview process for each role.
* By planning ahead, you can ensure consistency, reduce bias, and focus on selecting the best candidate for the job based on skills, experience, and values alignment.

**Why Create an Interview Plan?**

* Consistency: Standardizes the interview process for all candidates.
* Clarity: Helps the panel understand what to assess and how to score responses.
* Fairness: Reduces unconscious bias by using structured questions and scoring.
* Efficiency: Ensures the interview process stays organized and on schedule.

## Overview of the Interview Process:

1. **Define Role Requirements:** Use the job description and team needs to identify the critical competencies and skills for the role.
2. **Create the Interview Plan:** Use this template to outline interview rounds, select questions, and define scoring criteria. Collaborate with your People Ops Business Partner or Generalist if you need assistance.
3. **Meet with the Interview Panel:** Review the plan, assign roles (e.g., question lead, notetaker), and ensure everyone understands the scoring rubric.
4. **Conduct the Interviews:** Follow the structured plan for all candidates to ensure consistency.
5. **Facilitate the Debrief:** Use the decision matrix to evaluate candidates and select the best fit based on scores and observations.
6. **Document the Process:** Record outcomes in your recruitment platform and provide feedback to candidates.

## Need Help?

Contact your People Ops Business Partner or Generalist for support in:

* Creating or reviewing your plan.
* Selecting appropriate interview questions and skills assessment activities.
* Facilitating the interview debrief.

## Interview Plan Template

**Position Title:** [Insert Job Title]

**Department:** [Insert Department]

**Hiring Manager:** [Insert Name]

**Interview Panel Members:** [List Names]

**Date Created:** [Insert Date]

**Round 1:** Initial Screening (phone interview, emailed questions with written responses, etc.)

**Round 2:** Cultural Fit, Core Competencies and Skills (formal interview)

**Round 3:** Cultural Fit and Interpersonal Skills (Optional)

**Round 4:** Skills Demonstration (Optional)

**Timeline:**

|  |  |  |
| --- | --- | --- |
| **Date/Date Range** | **Activity** | **Notes** |
|  | Post Job\* |  |
|  | Review Applications |  |
|  | Notify unqualified candidates of declination | Via email |
|  | Schedule Round 1 Interviews (or send Round 1 screening questions) |  |
|  | Schedule Round 2 Interviews for top **[enter #]** candidates | Via phone call |
|  | Notify Round 1 low score candidates of declination | Via email |
|  | Schedule Round 3 Interviews for top **[enter #]** candidates |  |
|  | Notify Round 2 low score candidates of declination | Personal phone call |
|  | Schedule Round 4 Skills Demonstration for top **[enter #]** candidates |  |
|  | Notify Round 3 low score candidates of declination | Personal phone call |
|  | Panel Debrief meeting/collect all notes and Decision Matrices |  |
|  | Make job offer |  |
|  | Once offer accepted, notify other candidates of declination | Personal phone call |

\*Extend post if we do not receive at least \_\_\_\_\_\_ qualified candidates

**Round 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Desired Attributes for Decision Matrix**

List the competencies and skills you are looking for in this round. Then, define each one generally as well as describe what each would look like at a level 1, 2, or 3.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Criteria** | **Weight**  **(1-3)** | **Definition** | **1 – Red Flag** | **2 – Meets Minimum** | **3 - Excellent** |
| Skill/Criterion 1 |  | [Define what this is] | [Describe what low performance would look like] | [Describe what acceptable would look like] | [Describe what exceptional would look like] |
| Skill/Criterion 2 |  |  |  |  |  |
| Skill/Criterion 3 |  |  |  |  |  |
| Skill/Criterion 4 |  |  |  |  |  |
| Skill/Criterion 5 |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Questions** (make sure each question ties back to a skill/criterion from above).

|  |  |
| --- | --- |
| **Question** | **Skill/Criterion this question is assessing** |
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|  |  |
| 4. |  |
| 5. |  |
| 6. |  |
| 7. |  |

**Round 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Desired Attributes for Decision Matrix**

List the competencies and skills you are looking for in this round. Then, define each one generally as well as describe what each would look like at a level 1, 2, or 3.

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| --- | --- | --- | --- | --- | --- |
| **Criteria** | **Weight**  **(1-3)** | **Definition** | **1 – Red Flag** | **2 – Meets Minimum** | **3 - Excellent** |
| Skill/Criterion 1 |  | [Define what this is] | [Describe what low performance would look like] | [Describe what acceptable would look like] | [Describe what exceptional would look like] |
| Skill/Criterion 2 |  |  |  |  |  |
| Skill/Criterion 3 |  |  |  |  |  |
| Skill/Criterion 4 |  |  |  |  |  |
| Skill/Criterion 5 |  |  |  |  |  |
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**Questions** (make sure each question ties back to a skill/criterion from above).

|  |  |
| --- | --- |
| **Question** | **Skill/Criterion this question is assessing** |
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| 4. |  |
| 5. |  |
| 6. |  |
| 7. |  |

**Round 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Desired Attributes for Decision Matrix**

List the competencies and skills you are looking for in this round. Then, define each one generally as well as describe what each would look like at a level 1, 2, or 3.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Criteria** | **Weight**  **(1-3)** | **Definition** | **1 – Red Flag** | **2 – Meets Minimum** | **3 - Excellent** |
| Skill/Criterion 1 |  | [Define what this is] | [Describe what low performance would look like] | [Describe what acceptable would look like] | [Describe what exceptional would look like] |
| Skill/Criterion 2 |  |  |  |  |  |
| Skill/Criterion 3 |  |  |  |  |  |
| Skill/Criterion 4 |  |  |  |  |  |
| Skill/Criterion 5 |  |  |  |  |  |
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**Questions** (make sure each question ties back to a skill/criterion from above).

|  |  |
| --- | --- |
| **Question** | **Skill/Criterion this question is assessing** |
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| 5. |  |
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| 7. |  |

**Round 4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Desired Attributes for Decision Matrix**

List the competencies and skills you are looking for in this round. Then, define each one generally as well as describe what each would look like at a level 1, 2, or 3.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Criteria** | **Weight**  **(1-3)** | **Definition** | **1 – Red Flag** | **2 – Meets Minimum** | **3 - Excellent** |
| Skill/Criterion 1 |  | [Define what this is] | [Describe what low performance would look like] | [Describe what acceptable would look like] | [Describe what exceptional would look like] |
| Skill/Criterion 2 |  |  |  |  |  |
| Skill/Criterion 3 |  |  |  |  |  |
| Skill/Criterion 4 |  |  |  |  |  |
| Skill/Criterion 5 |  |  |  |  |  |
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**Skills Assessment** (make sure the assessment ties back to a skill/criterion from above).

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| --- | --- |
| **Description of Skills Assessment Activity** | **Skill/Criteria this Activity is Assessing** |
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