

 **Hi Remi**

JOB INTAKE WORKSHEET

Your job isn't to push CVs to your hiring manager or close a vacancy. That would be too easy.

Your job is to understand the business problem well enough to find the one person who can solve it.

This worksheet is here to help you become a recruiter that solves business problems rather than fill vacancies.

Use the checklists to prepare for your intake calls, document your scorecard for better alignment and align on the overall process.

This way you will be able to identify the right candidates faster and ensure an overall alignment from all stakeholders on what's actually needed.

SECTION 1

Kick-Off Prep Checklist

How to prepare before your job intake call. Work through this before you ever get on the call with the hiring manager — it's what lets you sound like an expert from the first question.

Company

- ☐ Research the website & careers page
- ☐ I understand the company
- ☐ I understand the product / service
- ☐ The job description is researched or requested
- ☐ Research the company on LinkedIn
 - ☐ Which employees work there, and what's their background?
- ☐ I understand the market the company operates in
- ☐ I understand how this business unit (e.g. AI Engineering, ML) is typically structured in this market: which roles exist, what they do, and what sets them apart

Role

- ☐ What are common job titles for this role?
- ☐ What tools does this role work with?
- ☐ What platforms does this role work on?
- ☐ What are common LinkedIn keywords for this role?
- ☐ What do salaries look like across seniority levels?
- ☐ What criteria drive those salary differences?
- ☐ Which industries does this role typically come from?
- ☐ What does this role do operationally, day-to-day?
- ☐ What does this role do strategically?
- ☐ Which internal teams does this role work with?
- ☐ What are common KPIs for this role?

"Understand the company. Understand the department. Understand the role. Understand the industry — ideally better than the hiring manager does."

SECTION 2

Kick-Off Checklist

Make sure you get this information out of the kick-off call itself. Recommended length: 60 minutes.

Attendees

- ☐ Talent partner (you)
- ☐ Hiring manager / client point of contact
- ☐ Your notetaker

Goal of the kick-off

Walk away with a deep understanding of: the company, the department, the role, the ideal candidate, and the next steps in the process.

Discovery questions to cover

- ☐ Short summary of the company: founding story, USP, revenue
- ☐ How many employees are there today? How much do you want to grow next year?
- ☐ How many people are on this team?
- ☐ Why do you need this position? What impact does it have?
- ☐ What goals or milestones matter after 6-12 months? Bonus system, KPIs, targets for that bonus?
- ☐ What will this person actually do?
- ☐ What's the tech stack?
- ☐ Who does this role work with, and who do they report to?
- ☐ Does this role work with external partners or agencies?
- ☐ What competencies does this person need?
 - ☐ Hard skills (language, tech stack, tools, prior experience)
 - ☐ Soft skills (traits, working style)
- ☐ How would you describe your culture? What matters most to you?
- ☐ What work experience is required?
 - ☐ How many years?
 - ☐ Which industries?
 - ☐ Track record expectations?
- ☐ What's the budget for this role?
- ☐ What's the working model? (Remote/hybrid/office, hours, pets-at-work, etc.)
- ☐ What does the interview process look like?
- ☐ Agree on a check-in cadence
- ☐ Anything specific I should watch for in screening? Must-ask questions? A "dream profile" example?
- ☐ If I deliver candidates, can you move them stage-to-stage within 48 hours? If not, how can I help you keep the process moving?

Notes from the call

Notes from the call

SECTION 3

Creating a Scorecard

Turn what you learned in the kick-off into a working scorecard. This is the reference document you'll screen every candidate against.

Role Title

Hiring Manager

Date of Kick-Off

Vision

What is this role's reason for existing? What impact does it have on the business?

Mission

3-8 specific, clear milestones or goals this role is expected to deliver.

- ☐ Milestone 1:

- ☐ Milestone 2:

- ☐ Milestone 3:

- ☐ Milestone 4:

- ☐ Milestone 5:

- ☐ Milestone 6:

- ☐ Milestone 7:

- ☐ Milestone 8:

Competencies

3-12 competencies needed to hit those goals — capabilities and traits needed to perform in this environment.
Reminder: education and years of experience are not competencies.

- | | |
|--|---|
| ☐ Competency 1: | ☐ Competency 7: |
| ☐ Competency 2: | ☐ Competency 8: |
| ☐ Competency 3: | ☐ Competency 9: |
| ☐ Competency 4: | ☐ Competency 10: |
| ☐ Competency 5: | ☐ Competency 11: |
| ☐ Competency 6: | ☐ Competency 12: |

Persona

Track record and identifying markers of the person who fits this persona.

Pre-Screen Qualifying Questions

Now build your own list of questions to ask candidates on a first pre-screen call, to check they're a fit for the hiring manager's goals and competencies above.

You don't need to cover every single goal or competency here — pick the ones that matter most for a first, quick pre-screen. Save the deeper questions for the next round.

#	Question	Which goal / competency it checks	What a good answer sounds like

Quick reference: from mindset to worksheet

Prep (Section 1) → Kick-Off (Section 2) → Scorecard (Section 3) → Pre-screen questions (above). Each step feeds the next. If the prep is thin, the kick-off runs shallow. If the kick-off runs shallow, the scorecard is generic. And a generic scorecard produces generic pre-screen questions — the exact CV-shipping trap the video warns about.

SECTION 4

Worked Example: A Scorecard for a Startup Head Role

A fictional example to show the full worksheet in action — from vision to interview questions. The company, numbers, and person below are invented for illustration; only the structure is meant to be reused.

Company Snapshot

Company	Fernbay — a B2B SaaS platform that automates supplier onboarding and compliance checks for mid-market procurement teams.
Stage	Series A, closed 4 months ago. Team has grown from 6 to 19 people.
ARR	~€950K, growing mostly through founder-led sales and word of mouth.
The Gap	Customer success is still handled personally by the two co-founders. That worked for the first ~30 accounts — it won't work for the next 100.
Role	Head of Customer Success (first CS hire, individual contributor building toward a team).

Vision

Fernbay has grown ARR 3x in the last year, almost entirely through founder-led sales and onboarding. That doesn't scale past the current ~30 customers, and churn is already creeping up as account volume grows. We need a Head of Customer Success to build a real retention and expansion engine from scratch, so growth stops depending on the founders' calendars.

Mission — SMART Goals

3-8 specific, measurable goals, each tied to a deadline.

- ☐ Within 60 days: design and launch an onboarding playbook that gets new customers to first value in 14 days, down from ~35 today.
- ☐ Within 90 days: build a customer health-score system (usage data + qualitative signals) covering 100% of the active base.
- ☐ Within 6 months: cut annual logo churn from 16% to under 8%.
- ☐ Within 9 months: launch an expansion/upsell motion generating at least 15% of ARR from existing accounts.
- ☐ Within 6 months: hire and onboard the first 2 CS Managers, building a team structure that can support 150+ accounts.
- ☐ Within 12 months: establish a quarterly NPS/CSAT process and reach an NPS of 40+.
- ☐ Ongoing: own renewals end-to-end for every account above €20K ARR, starting in month one.
- ☐ Within 90 days: set up a monthly voice-of-customer review with product and the founders.

Competencies

Each competency has a concrete indicator, so every interviewer is evaluating the same thing.

Competency	Indicator / Definition
CS Playbook Design	Candidate has built an onboarding or retention playbook from scratch at a B2B SaaS company — not just executed one someone else designed.
Data-Driven Retention	Candidate volunteers concrete numbers (NRR, logo churn, health scores) without being prompted for them.
Team Building	Candidate has hired, onboarded, and managed at least one CS hire — not purely an individual contributor track record.
Cross-Functional Influence	Candidate gives a specific example of shaping product or packaging decisions through customer feedback.
0-to-1 Ownership	Candidate shows evidence of building something new, rather than maintaining an existing process.
Communication	Candidate is clear and concise, and comfortable presenting data directly to founders or leadership.

Persona

A set of indicators to speed up sourcing — not a checklist a candidate has to fully match.

- ☐ 4-7 years in Customer Success, including 1-2 years in a build-it-yourself capacity (not just execution)
- ☐ Ideally from a B2B SaaS company between Seed and Series B, under ~100 employees
- ☐ Has owned a book of business above €1M ARR, or scaled one from a much smaller base
- ☐ Comfortable staying hands-on — this isn't a pure-management role at this stage

FROM THE SCORECARD GUIDE

- Years of experience is an indicator, not a competency — the actual skill only gets confirmed in the interview itself.
- Persona is not truth. It speeds up sourcing, but it's never a reason to reject someone in-process.
- If you can't say with about 90% confidence whether a candidate has a competency, that's a signal to ask another follow-up — not to guess.

Recruiting Process

#	Step	Purpose
1	Pre-Screening	First qualification by the recruiter — persona indicators, availability, salary expectations.
2	Hiring Manager Screen	Second qualification — competency questions, motivation, communication.
3	Case Interview	Deep evaluation of core competencies through a structured, realistic case.
4	Team Interview	Culture fit, collaboration style, soft skills.
5	Offer	Final feedback round and contract negotiation.

Pre-Screening: Structure

The company pitch comes near the end, not the start — pitch first and candidates just answer with what they think you want to hear.

- ☐ Intro — recruiter briefly introduces themselves, then hands over to the candidate
- ☐ CV walkthrough — candidate walks through their background, first indicators surface here
- ☐ Targeted questions — competency questions pulled straight from the scorecard above
- ☐ Company pitch — only now introduce Fernbay and the role
- ☐ Candidate questions — leave at least 5-10 minutes
- ☐ Close — confirm availability and salary expectations, explain next steps

Case Interview: Sample Question

"Walk me through an onboarding or retention process you built from scratch. What was the starting point, what did you actually build, and what was the result?"

Follow-ups, if not already covered: How did you choose that approach over alternatives? What did you personally own versus what did the team own? What would you change in hindsight?

Green flags	Red flags
• Concrete, numbers-backed process rather than a generic description	• Vague answer with no real numbers or specifics
• Shows individual ownership, not just execution of someone else's plan	• Can't explain their personal role versus the team's
• Reflects honestly on what didn't work, not just the wins	• Attributes all success to the manager or team
• Thinks beyond CS in isolation — connects to product or sales	• No sign of reflection or lessons learned