

CONNECTLY RECRUITING INSIGHTS

Strategic Intake Meeting Template.

From Order Taker to Talent Advisor: A comprehensive
guide to aligning business impact with candidate
profiles.

Connectly Recruiting

THE ART OF CONNECTION. THE SCIENCE OF SUCCESS.

OVERVIEW

Inside This Template

The intake meeting is the most critical step in the recruitment lifecycle. It is the transition point where a recruiter moves from executing a transaction to becoming a strategic business partner.

THE STRATEGIC GOAL

To align on the business impact, define the ideal candidate profile beyond technical skills, and establish a shared commitment to the hiring process and timeline.

1. Business Context & Strategic Need

- Why is this position open? (Growth, replacement, or new capability?)
- What is the business impact if this role remains vacant for 60-90 days?
- What are the top 3 objectives this person must accomplish in their first 6 months to be considered a "home run" hire?
- How does this role contribute to the department's current quarterly or annual goals?

THE PROFILE

2. The Ideal Candidate Profile

- Who are your top performers in similar roles? What specific traits or backgrounds make them successful here?
- What are the 3-5 "Must-Have" skills vs. "Nice-to-Have" attributes?
- What are the inherent challenges of this role? (e.g., high pressure, ambiguity, technical complexity)
- What is the 2-5 year career trajectory for someone entering this position?

3. The Value Proposition

To attract top talent, we must be able to "sell" the opportunity. Why would a high-performer leave their current role to join your team?

- Why Connectly? Why would a top-tier candidate leave their current role to join your team?
- What are the top 5 selling points? (Impact/Mission, Team/Culture, Technology/Innovation, Growth/Development, Flexibility/Benefits)
- How would you describe your leadership style and the department culture?

4. Sourcing & Market Intelligence

- Which competitors or similar organizations should we target?
- Are there any companies or specific profiles we should avoid?
- Do you have internal or external candidates you'd like us to consider or reach out to?
- What specific industry terms or "buzzwords" should I look for (or avoid) on resumes?

5. Logistics & Process Alignment

- Who are the key stakeholders involved in the interview process? What is the specific sequence of interviews?
- When is the ideal start date? Can we block out interview times on your calendar now?
- What is your preferred method and frequency for status updates? (e.g., Weekly email, Friday sync)
- How quickly can we move candidates through the process?

YOUR NEXT STEP

Ready to Find Your Next Top Performer?

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Success in hiring starts with a shared vision. Let's turn these insights into a high-impact search strategy.

Schedule a Consultation

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