THE PEOPLE PLAYBOOK · SOP 1 OF 4

Recruiting and Hiring

Book One of the People Playbook for [FIRM NAME]

Document owner	[RECRUITING COORDINATOR]
Approved by	[APPROVER]
Applies to	All hiring at [FIRM NAME]
Version	1.0
Effective date	
Next scheduled review	

Part of The Law Firm Operating System Implementation Workbook

Contents

1. How to Use This Standardized Operating Procedure (SOP)

This document is a complete, working recruiting system. Every stage has a named owner, a time limit, a written exit criterion, and a template you can use this week.

It is deliberately **role-agnostic**. One process runs every hire in the firm, from a part-time file clerk to a partner-track associate, and the process flexes by **role tier** rather than being rewritten per position.

What This SOP Assumes

- One person owns the process end to end. Hiring fails from diffusion of responsibility more often than from a bad candidate pool.
- You are always recruiting. The firms that hire well do not start recruiting when someone quits; they keep a warm bench and a live pipeline.
- Speed is a competitive advantage. Assume good candidates are off the market inside two weeks. Every service-level target in this document exists because delay, not competition, loses most hires.
- A written scorecard beats a good gut. The gut is allowed a vote, never a veto over evidence.

Before You Use It: Customize These Six Things

Do a find-and-replace pass on the bracketed placeholders.

Placeholder	Replace with
[FIRM NAME]	Your firm's name as it appears publicly.
[HIRING MANAGER]	The role title of the person who will manage the new hire and owns the hiring decision.
[RECRUITING COORDINATOR]	The role title of the person who runs the logistics, posting, scheduling, follow-up, records. In a small firm this is often the office manager or the owner's assistant.
[APPROVER]	Whoever signs off on headcount and compensation. Usually the owner, managing partner, or Chief Operating Officer (COO).
[ATS / TRACKER]	Where candidates live, an applicant tracking system, a shared spreadsheet, or a board in your project tool.
[CAREERS PAGE URL]	The single page every ad points to. If you don't have one, build it before you post anything.

This is a template, not legal advice

Employment law is federal, state, and often municipal, and it changes. Pay-transparency rules, salary-history bans, ban-the-box ordinances, wage-notice requirements, background-check procedures, and independent-contractor tests all vary by jurisdiction and several have shifted in the last two years.

Have employment counsel licensed in your state review your job descriptions, your offer letter, and your interview guides before you use them, and re-review annually. Nothing in this document is legal advice, and the sample language here is a starting point for that review, not a substitute for it.

2. Roles and Responsibilities

Role	Owns	Does not own
[APPROVER] (Owner, Managing Partner, or COO)	Approving the requisition and the compensation range before any work starts. Approving the final offer. Breaking ties when the panel splits.	Screening resumes, scheduling, chasing candidates.
[HIRING MANAGER]	The hiring decision and the outcome. Writes the role scorecard and job description. Runs the first interview. Scores every candidate they meet. Manages the new hire through Day 90.	Posting ads, coordinating calendars, sending rejections.
[RECRUITING COORDINATOR]	The process itself: posting and refreshing ads, tracking source of every applicant, first-pass resume sort against written knockouts, the initial screening call, all scheduling, all candidate communication, records retention, and the weekly key performance indicator dashboard.	The hire/no-hire decision. The coordinator can eliminate on written criteria; they cannot select.
Interview Panel (1–2 people)	Independent, written scores submitted before any group discussion. Usually, one peer who will work alongside the hire, and for Tier 3–4 one person from outside the department.	Negotiating comp or hinting at an offer. Panelists answer questions; they never make commitments.
Payroll / HR administration	Offer letter issuance, background-check compliance, I-9 and E-Verify where applicable, state wage notices, personnel file setup, benefits enrollment.	Assessing candidate fit.

3. The Calibration Key for Role Tiers

Tier	Typical roles	2nd interview	Target time to fill	External spend ceiling
T1	Entry and administrative: receptionist, file clerk, runner, records clerk, part-time intake support.	No. One interview plus a practical task is enough.	20 days	3–6% of first-year base
T2	Skilled support: legal assistant, paralegal, case manager, intake specialist, bookkeeper, marketing coordinator.	Optional. Required if the role has unsupervised client contact, handles money, or has direct deadline authority on a file.	30 days	6–12% of first-year base
T3	Licensed and professional: associate attorney, senior paralegal, controller, in-house marketing lead.	Required.	45 days	12–20% of first-year base
T4	Leadership: COO, firm administrator, practice group lead, director of operations.	Required, plus a presentation or case-study round.	60–90 days	20–30% of first-year base

Read the spend column as a ceiling, not a budget. It is the number above which you should stop and ask whether the problem is the ad, the pay, or the role itself.

These percentages cover **external** spend only; advertising, agency fees, assessments, background checks, referral bonuses, events. Internal staff time is a real cost and is frequently larger than all of it; track it inside cost per hire, but do not measure it against these ceilings.

4. The Pipeline at a Glance

#	Stage	Owner	Clock	Exit criterion (advance only when)
0	Requisition Approval	[APPROVER]	Before all else	Signed requisition with an approved comp range and a named hiring manager.
1	Role Scorecard and Job Description	[HIRING MANAGER]	2 business days	Scorecard lists 3–5 measurable outcomes; Job Description is complete and counsel-reviewed; Culture Plus Core 4 question bank built (Section 14.1).
2	Job Ad Written	[HIRING MANAGER] drafts, [RECRUITING COORDINATOR] finalizes	1 business day	Ad meets the ad standard in Section 7.
3	Posted to Platforms	[RECRUITING COORDINATOR]	Same day	Live on every planned channel, apply flow tested end to end, source tracking on.
4	Resume Review	[RECRUITING COORDINATOR]	Within one business day of application	Scored against the written screening sheet; every applicant sorted into advance / hold / decline.
5	Initial Screening Call (15–20 min)	[RECRUITING COORDINATOR]	Within 3 business days of application	All four knockouts confirmed; screening score ≥ 7 of 10.
6	First Interview (45–60 min)	[HIRING MANAGER]	Within 5 business days of screening	Four Proofs scored independently: ≥ 3 on all four, and ≥ 4 on Capability and Drive.
7	Practical Assessment	[HIRING MANAGER]	Same week	Work sample scores a weighted average of 3.5 or better out of 5 on the written rubric.
8	Second Interview / Panel	[HIRING MANAGER] + Panel	Within 5 business days	Unanimous enthusiastic yes. Anything less is a no.
9	References and Credential Verification	[RECRUITING COORDINATOR]	2–4 business days	Two supervisor references completed; license, certification, and education verified with the issuing body.
10	Conditional Offer	[APPROVER] approves, [HIRING MANAGER] delivers verbally	Verbal same day, written within 24 hours	Signed offer letter returned.
11	Background Check	[RECRUITING COORDINATOR]	3–5 business days after the offer is signed	Cleared per the FCRA sequence in Section 16. Ordered only after the conditional offer — never before.
12	Pre-boarding Handoff	[RECRUITING COORDINATOR] → onboarding	Within 48 hours of clearance	Start-date packet sent, equipment ordered, day-one schedule built.

The 30-Day Standard Schedule (Tier 2 Baseline)

Use this as the default calendar. Tier 1 compresses it to roughly 20 days; Tier 3 stretches it to about 45 by adding a second interview and a longer reference process.

Day	What happens	Who is on the hook
Day 0	Requisition approved. Scorecard, Job Description, and the Culture Plus Core 4 exercise started.	[APPROVER], [HIRING MANAGER]
Day 2	Job Description final. Ad written and approved.	[HIRING MANAGER]
Day 3	Ads live on all channels. Referral request sent to the whole team.	[RECRUITING COORDINATOR]
Days 4–10	Rolling resume review within one business day of each application. Screening calls booked as candidates clear the sheet.	[RECRUITING COORDINATOR]
Days 8–14	First interviews. Target 3–5 first interviews to produce one hire.	[HIRING MANAGER]
Days 12–18	Practical assessments returned and scored.	[HIRING MANAGER]
Days 15–21	Second interviews and panel for the top two candidates.	Panel
Days 20–23	References and credential verification on the lead candidate. Backup candidate kept warm.	[RECRUITING COORDINATOR]
Days 23–25	Verbal offer, then the written conditional offer within 24 hours. Three-business-day acceptance window.	[HIRING MANAGER], [APPROVER]
Days 25–28	Signed acceptance received. Background check ordered and cleared. Ads pulled down; all other candidates closed out within 48 hours.	[RECRUITING COORDINATOR]
Days 28–30	Pre-boarding begins. Start-date packet, equipment, and day-one schedule.	[RECRUITING COORDINATOR]

The Weekly Recruiting Stand-Up: 15 minutes, same time every week

While any role is open, [RECRUITING COORDINATOR] and [HIRING MANAGER] meet for fifteen minutes. Four questions, in order, no discussion of anything else:

1. How many new applicants since last week, and from which source?
2. Who is stuck, and at which stage, and for how long?
3. What is the single next action on each of the top three candidates, and who owns it by when?
4. Is any KPI in Section 8 outside target? If so, which diagnosis in the table applies?

5. Gate 0: Requisition Approval

Nothing in this SOP starts until someone with authority has decided this role should exist. The most expensive hiring mistake is not a bad hire; it is a hire that should never have been opened, a headcount solution applied to a process problem.

The Five-Question Test

[HIRING MANAGER] answers these in writing. [APPROVER] signs or sends it back. Both keep a copy.

1. **What specific outcome is not happening today, and what is it costing us per month?** Name a number: unreturned calls, cases past a deadline, unbilled hours, a backlog in days. "We're busy" is not an outcome.
2. **Have we tried fixing this with process, technology, or reassignment first?** If a workflow fix or an automation would recover the same capacity for less than three months of the new salary, do that first.
3. **What does this role produce that pays for itself?** Every seat should trace to revenue protected, revenue produced, capacity released for someone who produces revenue, or risk reduced. Write the trace.
4. **Who manages this person, and do they have the capacity to manage one more?** A manager already at capacity turns a good hire into a failed hire in ninety days.
5. **Can we fund the fully loaded cost for twelve months, in a slow quarter?** Base plus taxes, benefits, software seats, equipment, workspace, and the manager's time. Budget roughly 1.25 to 1.4 times base for the loaded figure.

If any answer is weak, do not open the role. Fix the process or wait. A requisition sent back is a cheap decision; a hire made to relieve pressure is an expensive one.

Approved Requisition: Required Fields

Role title · Tier (1–4) · Hiring manager · Reason for opening (growth / replacement / restructure) · Approved compensation range (floor, target, ceiling) · Exempt or non-exempt classification · Full-time, part-time, or contract · Location and schedule · Target start date · Approved recruiting spend cap · Approver signature and date

The blank form is Appendix A.

6. Role Scorecard and Job Description

Two documents, two jobs. The **Role Scorecard** is what you hire and manage against. The **Job Description** is the formal record of the position.

6.1 The Role Scorecard

The scorecard answers a single question: **What has to be true in twelve months for us to say this hire was a success?**

Section	What goes in it
Mission	One sentence on why the seat exists. "Own the client file from signed retainer through settlement so attorneys never touch administrative work." Not a list of duties.
Outcomes (3–5)	Measurable results with numbers and dates. "Return every client call within one business day, measured at 95% or better by month three." "Reduce average days-to-demand from 45 to 30 by month six." If an outcome has no number, it is a duty, not an outcome.
Competencies (5–7)	The behaviors required to produce those outcomes. Be specific and observable: "writes clean first drafts with fewer than two substantive edits," not "good communicator."
Non-negotiables (2–4)	The knockouts. License, certification, minimum verified experience, schedule, software proficiency, language. These become the resume-review knockouts in Section 11 and the screening-call knockouts in Section 12. If it isn't on this list, it cannot eliminate a candidate later.
What this role is not	The boundary. Prevents scope creep in the ad and disappointment in month two.

6.2 The Job Description

The Job Description is the formal, internal-facing document. It is not marketing copy. It does four jobs at once: it defines the position for compensation and classification purposes, it establishes the essential functions that anchor any reasonable-accommodation analysis, it gives you a defensible basis for the criteria you screen on, and it becomes the reference point for performance reviews.

The fillable template is Appendix K.

Required Sections

Section	Notes
Job Title	Use the title candidates actually search for, not an internal invention. Job-board search matches on the title more than any other field.
Reports To	One person. A role with two managers is a role that will fail.
Classification	Exempt or non-exempt, full-time or part-time, and the basis for the determination. Get this reviewed. Misclassification is one of the most expensive unforced errors in a small firm, and support roles are misclassified as exempt constantly.
Compensation Range	The approved floor and ceiling. Many jurisdictions now require a good-faith range in the posting itself, confirm your state and city rules before you publish.
Position Summary	Two or three sentences drawn from the scorecard mission.
Essential Functions	The core duties, each starting with an action verb, each genuinely essential. This is the section that matters legally, so be honest about what is essential versus merely typical. Estimate the

Section	Notes
	percentage of time on each of the top three.
Performance Outcomes	Lifted straight from the scorecard, with the numbers intact. This is what makes the Job Description usable at review time.
Required Qualifications	Only what is genuinely required. Every line here shrinks your pool, so each one should be defensible if challenged.
Preferred Qualifications	The wish list lives here, clearly separated, and labeled "preferred." Survey research consistently finds that strong candidates self-select out when preferences read as requirements, and that the effect is larger for women. Make the distinction unmistakable on the page.
Physical and Environmental Demands	Written factually and only where accurate. Relevant to accommodation analysis.
Supervisory Responsibility	Number of direct reports, or "none."
Travel and Schedule	Including on-call or court-coverage expectations, if any.
Acknowledgment	Signature line, plus the standard note that the description is not exhaustive and duties may change.

Six Rules for Writing the Job Description

1. **Outcomes before duties.** A list of duties describes activity. Outcomes describe success, lead with success.
2. **Cut every requirement you cannot defend.** For each line in "required," ask: would I truly reject an otherwise excellent candidate over this? If not, move it to preferred or delete it.
3. **Be specific about volume.** "Manage a caseload of 60–80 active files" tells a real paralegal whether to apply. "Manage caseload" tells them nothing.
4. **Name the software.** Your case-management system, document platform, phone system, and accounting software. It is a free filter and it is what candidates search on.
5. **No inflated titles for uninflated pay.** A "Director of Client Experience" job at receptionist pay attracts the wrong applicants and insults the right ones.
6. **Have counsel review it once, then reuse the frame.** You pay for the review of the first two or three descriptions; after that you are editing a reviewed template.

7. The Job Ad

The Job Description is a legal and operational document. The **Job Ad** is a piece of marketing. Posting your job description as your ad is the single most common recruiting mistake in professional services, and it is why so many firms conclude "there are no good candidates out there" when what they have is a conversion problem.

	Job Description	Job Ad
Audience	Internal: you, your counsel, your reviewer, an investigator.	External: a working professional scrolling on their phone during a lunch break.
Job to be Done	Define and defend the position.	Make a qualified person stop scrolling and apply.
Voice	Neutral, precise, complete.	Direct, human, specific. Sounds like a person, not a policy.
Length	As long as accuracy requires.	350–600 words. Anything longer loses mobile readers.
Structure	Formal headings.	Hook, then the honest pitch, then the filter, then one clear ask.
Where it Lives	Personnel file, comp records, review packet.	Job boards and your careers page.

7.1 Anatomy of an Ad That Converts

Block	Length	What it Must Do
Title	1 line	The searchable title, plus one clarifier if it helps: "Personal Injury Paralegal (Pre-Litigation)" or "Legal Assistant — Family Law." No internal jargon, no cute titles, no all caps.
Hook	2–3 sentences	Open with the candidate's reality, not your firm's history. "You're a paralegal who's tired of being the fourth set of hands on a file you could run yourself." Nobody's first question is how long you have been in business.
What You'd Do	4–6 bullets	Concrete daily and weekly work with real volume. Written as "you," not "the successful candidate."
What Success Looks Like	2–3 bullets	The scorecard outcomes, in plain language. This is the block that separates you from every other ad on the page, because almost nobody does it.
Who This is Right For	3–5 bullets	The honest filter. Include the non-negotiables and at least one line about temperament or work style.
Who This is Not Right For	2–3 bullets	Counterintuitive and enormously effective. "This isn't a fit if you want to specialize narrowly, you'll touch every stage of the file." It builds trust and it deflects volume you'd otherwise pay to screen.
Pay and Terms	2–4 lines	The range, schedule, location or remote policy, and the top three or four benefits with real numbers. Vagueness about pay is read as bad pay.
Why Here	2–3 sentences	Specific and provable. Training budget, growth path, the actual size of the team, how decisions get made. Skip "we're like a family."

Block	Length	What it Must Do
The Ask	1–2 lines	One instruction, one link, and a stated timeline: "Apply here. We review applications within one business day and you'll hear from us either way within three."

7.2 Job Ad Template

Fill the brackets.

[Job Title] — [Practice Area or Department]

[CITY, STATE] · [Full-time / Part-time] · [On-site / Hybrid — X days in office / Remote] · $[FLOOR]–$[CEILING] [per hour / annually]

[HOOK: one or two sentences naming the frustration your ideal candidate is living with right now, and the specific relief this role offers. Write it as if you were talking to one person you already know.]

At [FIRM NAME] we [ONE SENTENCE ON WHAT THE FIRM DOES AND FOR WHOM — the more specific the practice and the client, the better this filters]. We're hiring [ONE / TWO] [ROLE] to [PRIMARY PURPOSE OF THE SEAT].

What you'd actually be doing:

· [Core duty with real volume — "manage 60–80 active pre-litigation files"]
· [Core duty naming the software — "run intake and case updates in [CASE MANAGEMENT SYSTEM]"]
· [Core duty describing the client interaction — frequency and channel]
· [Core duty describing the writing or drafting expected]
· [Core duty describing what you own end to end, and what you don't]

What success looks like in your first year:

· By day 30: [ramp milestone]
· By day 90: [first measurable outcome, with the number]
· By month 12: [the outcome that defines the role, with the number]

This is right for you if:

· You have [X]+ years doing [SPECIFIC WORK] — ["and you can describe a file you ran start to finish"]
· You're [CREDENTIAL / LICENSE / CERTIFICATION], or you [SPECIFIC VERIFIABLE EQUIVALENT]
· [Work-style requirement stated honestly — pace, autonomy, volume, deadline pressure]
· [Temperament requirement — how they handle difficult clients, ambiguity, or correction]

This is not right for you if:

· [Honest limitation of the role — narrow specialization, no assistant, heavy phone volume, court coverage]
· [Honest limitation of the environment — small team, direct feedback, fast change]

Pay and Benefits:

· $[FLOOR]–$[CEILING] [hourly / annually], based on [THE ACTUAL BASIS – verified experience, credentials, book of business]
· [BENEFIT with the real number — "health insurance, firm pays 80% of employee premium"]
· [PTO — number of days, and when it starts accruing]
· [Retirement — plan type and match percentage]
· [One benefit your competitors don't offer — CLE budget, certification reimbursement, four-day summer schedule,

bonus structure]

Why [FIRM NAME]

[TWO OR THREE SENTENCES OF PROVABLE SPECIFICS: team size, growth trajectory, how decisions get made, what happened to the last person who held this seat — if it's a good story, tell it. No platitudes.]

How to Apply

Apply at [CAREERS PAGE URL]. Include [ONE SPECIFIC THING — a short note on why this role, a writing sample, or an answer to one question]. We review every application within one business day and you'll hear back from us either way within three.

[FIRM NAME] is an equal opportunity employer. [ADD YOUR COUNSEL-APPROVED EEO AND ACCOMMODATION LANGUAGE HERE.]

7.3 Nine Things That Kill a Job Ad

- **Pasting the Job Description.** It reads as bureaucratic because it is. The strongest candidates, the ones with options, leave first.
- **Hiding the pay.** "Competitive salary, commensurate with experience" is universally read as "below market." It also wastes both parties' time at the screening stage, and it is now unlawful in a growing number of jurisdictions.
- **Opening with your firm's history.** Founded in 1987 is not a hook. Lead with the candidate.
- **"Other duties as assigned" as a personality.** Vagueness attracts the desperate and repels the selective.
- **Requirement inflation.** Ten years for a role a strong five-year candidate would crush. Every extra year you demand cuts your pool and raises your price.
- **Fifteen bullets of duties and none of outcomes.** The candidate cannot tell what winning looks like, so they cannot tell whether they'd win.
- **A broken or hostile apply flow.** Test it yourself, on a phone, as a stranger. If it takes more than five minutes or demands an account, you are losing qualified people silently.
- **No timeline, or a timeline you break.** The promise in your ad is your first demonstration of how you operate. Break it and your best candidates draw the obvious conclusion.
- **Reposting the same ad that didn't work.** If an ad underperforms, the ad is the variable. Rewrite the hook and the pay line before you spend another dollar on placement.

8. Key Performance Indicators (KPIs)

Recruiting is a funnel, and a funnel that isn't measured cannot be fixed. Track these weekly while a role is open and monthly in aggregate. The point is not the dashboard; the point is that when hiring goes badly you will know **which stage** is failing instead of guessing.

Measure ten of these at most. A firm that reliably tracks time to fill, qualified applicant rate, offer acceptance, cost per hire, and 90-day retention is ahead of the great majority of its competitors.

8.1 The KPI set

KPI	How to calculate it	Target	Why it matters
Time to Fill	Calendar days from requisition approval to accepted offer.	T1 ≤ 20 · T2 ≤ 30 · T3 ≤ 45 · T4 ≤ 60–90	The master metric. Everything slow shows up here first.
Time to Hire	Calendar days from a candidate's application to their accepted offer.	T1–T2 ≤ 21 days · T3–T4 ≤ 35 days	Isolates your responsiveness from your sourcing speed.
Time to First Response	Business hours from application received to first human contact.	≤ 8 business hours (one business day)	The most-broken number in small-firm hiring, and the cheapest to fix.
Applicants per Opening	Total applications received per posted role.	T1–T2: 40–100 · T3: 15–40 · T4: 10–25	Low volume means a placement or pay problem. Very high volume with low quality means the ad is too vague.
Qualified Applicant Rate	Applicants passing the resume screen ÷ total applicants.	≥ 20%	The single best diagnostic on ad quality. Under 10% means you are paying to attract the wrong people.
Cost per Qualified Applicant	Total ad spend on the role ÷ applicants who passed the screen.	Paid channels: ≤ $150 · Blended across all channels including free and referral: ≤ $75	More actionable than cost per hire because you can see it within days, not weeks.
Screen-to-Interview Rate	First interviews scheduled ÷ screening calls completed.	40–60%	Below 40%: the resume screen is too loose. Above 60%: it is too tight, or the screener is not screening.
Interview-to-Offer Ratio	First interviews conducted ÷ offers extended.	3:1 to 5:1	Above 5:1 the earlier stages are passing people they shouldn't. Below 2:1 you are probably settling.

KPI	How to calculate it	Target	Why it matters
Offer Acceptance Rate	Offers accepted ÷ offers extended.	≥ 85%	Below 85% points at pay, at speed, or at how the offer is being delivered.
Source of Hire Mix	Hires by source, as a percentage.	≥ 25% from referrals	Referral hires are consistently the cheapest to acquire and the longest-tenured. If that share is near zero, you have an internal-marketing problem.
Cost per Hire	(All external costs + all internal costs) ÷ hires in the period.	See Section 9. Compare to your own trend first, benchmarks second.	The number to bring to a budget conversation.
Interview No-Show Rate	Candidates who miss a scheduled interview ÷ interviews scheduled.	≤ 15%	A high rate usually means slow scheduling or weak confirmation habits, not flaky candidates.
90-Day Retention	New hires still employed at day 90 ÷ hires.	≥ 95%	A failure here is a selection failure or an onboarding failure. Nothing else.
12-Month Retention	New hires still employed at month 12 ÷ hires.	≥ 85%	Measures whether the scorecard described the real job.
Time to Productivity	Days until the new hire hits the day-90 outcome on their scorecard.	≤ 90 days	Connects hiring quality to actual firm capacity.
Hiring Manager Satisfaction	1–5 rating from [HIRING MANAGER] at day 30 and day 90.	≥ 4.0	Cheap, subjective, and a reliable early warning.

8.2 Diagnosis: When a Number is Off, Look Here First

This table is the reason to track the funnel at all. Find the KPI that is out of range, then work the causes in order.

Symptom	Most Likely Cause, in Order of Likelihood
Very Few Applicants	1. Pay range is below market, check three live competitor postings today. 2. Ad is on the wrong platform for the tier. 3. Title is not what candidates search for. 4. Apply flow is broken or too long. 5. Genuinely thin local market, this is the last explanation to accept, not the first.
Many Applicants, Almost None Qualified	1. Ad is too vague about the work and the requirements. 2. No "this is not right for you" section. 3. Title is broader than the job. 4. Sponsored spend is bidding on generic terms. 5. No screener questions on the application.
Candidates Go Dark After Applying	1. You took more than one business day to respond. 2. First contact was a form email. 3. Scheduling took more than two round trips. 4. They were never that interested — you were

Symptom	Most Likely Cause, in Order of Likelihood
	their fourteenth application.
Strong on Paper, Weak in Interview	1. Resume screen is rewarding keywords instead of evidence. 2. Screening call is not probing the non-negotiables. 3. Ad oversold the role and attracted aspiration rather than capability.
Interviews Go Well, Offers get Declined	1. Pay is at or below the middle of the market. 2. Too many days between first interview and offer, you finished second. 3. Offer delivered by email instead of a live conversation. 4. Something in the interview process signaled disorganization.
Hires Fail Inside 90 Days	1. Nobody scored against a written scorecard. 2. No practical assessment — you tested talk, not work. 3. References were skipped or were friends rather than supervisors. 4. Onboarding did not exist. 5. The role was never viable as designed.
Every Hire Takes Forever	1. No single named owner. 2. Interviews scheduled around one impossible calendar. 3. Decision meetings that end without a decision. 4. Recruiting treated as an interruption instead of a standing responsibility.

9. The Recruiting Budget

Most firms have no recruiting budget. Budgeting recruiting is straightforward once you accept two facts: hiring is a predictable, recurring operating cost, and the largest line item is almost never the one you write a check for.

9.1 Cost Categories

Ranges below reflect publicly reported United States pricing and typical practice as of mid-2026. Vendor pricing moves, verify current rates before you commit, and treat these as planning figures rather than quotes.

Category	Typical Range	Notes
Job Board (Free Tier)	$0	Indeed allows a small number of free organic posts per month; LinkedIn has a free posting tier. Free posts lose visibility quickly and rarely fill a role on their own. Post free, but do not plan around it.
Job Board (Sponsored/Paid)	**Indeed Sponsored**: pay-per-click, commonly reported at about $0.10–$5+ per click and $15–$50 per usable application, with a $5/day budget minimum and a per-posting daily floor. Indeed has changed its billing model more than once in recent years, check the current model before you budget. **LinkedIn promoted posts**: from roughly $7/day. **LinkedIn Job Slots**: roughly $200–$1,000 per slot per month on annual contracts. **ZipRecruiter**: subscription slots, commonly reported in the $300–$700 per month per slot range depending on tier.	Budget $150–$1,200 per month per open role for a Tier 1–2 search, higher for Tier 3–4 or a competitive metro. Set a hard monthly cap per role. The number to watch is not cost per click but cost per **qualified** applicant.
Careers Page and Employer Brand	$0–$3,000 one time	A real careers page with role pages, photos of actual people, and a tested apply flow. This is the highest-return money in the entire budget and most firms spend nothing on it.
Applicant Tracking System	$0–$500 / month	A shared spreadsheet works under about six hires a year. Past that, the tracking failures cost more than the software.
Assessments	$15–$100 per candidate	Behavioral or cognitive instruments, typing and software proficiency tests, writing samples. Use them for information, never as the deciding vote, and only where job-related. Confirm any instrument you use is validated and lawful for selection in your jurisdiction.
Background Check and Screening	$30–$100 per candidate	Criminal, employment verification, education, license verification, and where applicable MVR. Run only on the finalist, and only after a conditional offer, following the FCRA sequence in Section 16.

Category	Typical Range	Notes
Employee Referral Bonus	$500–$2,000 per hire	The best return per dollar in recruiting. Pay half at 30 days and half at 90 or 180 days. Publish the amount internally — an unpublished referral program does not exist.
Recruiter or Agency Fee	15–30% of first-year base	Legal-specific search firms sit at the top of that range. Justifiable for a genuinely hard-to-fill Tier 3–4 seat or an urgent revenue-critical gap. Not justifiable as a substitute for a functioning process. Always negotiate a replacement guarantee of at least 90 days.
Job Fairs, Schools, Associations	$0–$1,500 per event	Paralegal programs, law school career services, and local bar and paralegal association boards. Slow, cheap, and the most reliable way to build a Tier 1–2 pipeline that exists before you need it.
Signing Bonus or Relocation	$0–$10,000	Reserve for Tier 3–4. Tie any signing bonus to a repayment clause with counsel-approved language.
Internal Time Cost	Usually, the largest line	Hours spent by everyone involved × their loaded hourly cost. Estimate honestly and include it: a partner's twelve hours on a paralegal search often exceeds the entire ad spend, and putting it on paper is what finally justifies the coordinator role.

9.2 Calculating Cost per Hire

Cost per hire

Cost per hire = (Total external recruiting costs + Total internal recruiting costs) ÷ Number of hires in the period

External: advertising, agency and recruiter fees, assessments, background checks, referral bonuses, events, ATS, signing bonuses.

Internal: staff hours spent recruiting × loaded hourly cost, plus any internal referral administration.

Calculate it per role and in aggregate per year. The per-role number tells you which searches are expensive; the aggregate tells you what to budget.

On benchmarks, and why to hold them loosely. Published cost-per-hire figures vary enormously because they measure different things. The widely quoted SHRM figure of roughly $4,700 is an **average** across all employers and includes internal cost; SHRM's more recent recruiting benchmarking has reported a **median** in the low four figures for non-executive roles and a far higher figure for executive roles. Averages get pulled upward by expensive executive searches; medians do not. Before you cite any of these to yourself or to a partner, confirm the current figure and the definition behind it in the source report.

Use benchmarks to sanity-check an order of magnitude, then stop. **Your own trend line over four quarters is a far more useful number than anyone's national average,** because it controls for your market, your practice area, and your process.

9.3 Three Ways to Set the Annual Number

Method	How	Best for
Percent of Payroll	Budget 1.5–3% of total annual payroll for	Firms with stable, predictable growth. Simplest to

Method	How	Best for
	recruiting. Toward 3% if you are growing headcount by more than 20% a year or run above-average turnover.	defend and easiest to forecast.
Per-Hire Target	Set a cost-per-hire ceiling as a percentage of first-year base by tier — see the tier table in Section 3 — then multiply by planned hires.	Firms with a real hiring plan for the year. Most precise, and it makes each search accountable.
Bottom-Up Build	Cost every planned search line by line from the categories in 9.1, then add 20% contingency.	Firms hiring fewer than five people a year or hiring an unusual role for the first time.

Two Rules That Keep the Budget Honest

Budget for 1.3 searches per planned hire. Some candidates decline, some hires fail inside 90 days, and some requisitions get reopened. A budget built on a one-to-one assumption is short by a third before the year starts.

Fund the pipeline, not just the openings. Ten to fifteen percent of the annual recruiting budget should go to always-on activity, careers page, referral bonuses, school and association relationships, keeping warm candidates warm. This is the spend that shortens every future search, and it is the first thing cut and the last thing regretted.

9.4 Where Firms Waste Recruiting Money

- **Agency fees paid to solve a process problem.** A 20% fee on a $70,000 paralegal is $14,000, roughly ten years of that role's ad budget. Sometimes the fee is the right call. Usually, it is the price of not having a coordinator.
- **Sponsored spend behind a weak ad.** Paying to put a bad ad in front of more people buys you more unqualified applicants and more screening hours. Fix the ad first; that is free.
- **Running ads with no source tracking.** If you cannot say which channel produced your last four hires, you cannot cut the channel that produced none of them.
- **Leaving ads live on autopilot.** Set a calendar reminder to review or kill every posting at 21 days. Sponsored budgets quietly outlive the search that justified them.
- **Turnover.** By a wide margin the largest recruiting expense in most firms is the cost of hiring the same seat repeatedly. Every dollar spent on a real scorecard, a practical assessment, and a genuine onboarding program is a recruiting cost avoided next quarter.

10. Ad to Platform

Where the ad goes matters as much as what it says. The rule is simple: **every ad drives to your careers page, and every applicant gets a source tag.** Job boards are traffic. Your careers page is where you convert, and it is the only place you control the experience.

10.1 Platform Matrix

Channel	Tiers	Best for	Cost posture	Watch out for
Internal Referrals	All	Highest-quality, longest-tenured hires. Always the first channel, always before external spend.	Referral bonus only	It doesn't happen unless you ask specifically and repeatedly, name the role, and publish the bonus.
Your Careers Page	All	Conversion. Every other channel points here.	One-time build	An untested apply flow silently loses your best applicants.
Indeed	T1–T3	Volume, and by a wide margin the best reach for support staff.	Free posts plus sponsored budget	Sponsored spend behind a vague ad buys unqualified volume. Cap the daily budget and check cost per qualified applicant weekly.
Linkedin	T2–T4	Passive candidates, attorneys, and leadership. The place to find people who are not looking.	Promoted posts or job slots	Weak for hourly and administrative roles. Do not pay for T1 here.
Ziprecruiter	T1–T2	Volume with heavy distribution to partner boards.	Monthly slot subscription	Overlapping applicants with Indeed. Run one or the other for a given search, not both.
State and Local Bar Association Boards	T2–T3	Attorneys and experienced legal staff who are already in the local legal community.	Low or free with membership	Small volume. Worth it for quality, not for reach.
Paralegal and Legal-Assistant Association Boards	T2	Certified, credentialed support staff.	Low	Requires you to maintain the relationship year-round.
Paralegal Programs and Law School Career Services	T1–T3	Building a pipeline that exists before you need it. Internships that convert.	Free to low	Long lead time. Start now for next year, not for this week.
Local Community and Social Channels	T1	Entry-level, part-time, and local administrative roles.	Free to very low	Keep the ad identical to your other postings. Inconsistency reads as disorganization.
Google For Jobs	All	Free organic exposure whenever someone searches your role plus your city.	Free	Requires structured job-posting markup on your careers page. Worth asking your web developer for

Channel	Tiers	Best for	Cost posture	Watch out for
				once.
Staffing Agency / Legal Search Firm	T3–T4	Genuinely hard-to-fill or urgent revenue-critical seats.	15–30% of first-year base	Never the first move. Negotiate a 90-day replacement guarantee in writing before you engage.
Re-Engaging Past Applicants	All	Your cheapest qualified pool. The runner-up from six months ago is often available now.	Free	Only works if you actually kept the records. See Section 19 on records retention.

10.2 Posting Checklist

[RECRUITING COORDINATOR] completes every line before the role is considered live. Any unchecked box means the role is not posted.

1. Job title is **identical** across every platform and matches what candidates search for.
2. Ad body is the marketing ad from Section 7, not the job description.
3. Compensation range is included, and it matches the approved requisition range exactly.
4. Location, schedule, and remote or hybrid policy are stated on every posting.
5. Every posting links to [CAREERS PAGE URL] as the single apply destination.
6. Apply flow tested end to end on a mobile phone, in a private window, as a stranger. Timed. If it takes more than five minutes, fix it before posting.
7. Two to four screener questions live on the application, each tied to a written non-negotiable from the scorecard.
8. Automatic acknowledgment email is on, is written like a human wrote it, and states the review timeline promised in the ad.
9. Source tracking is on; every applicant record in [ATS / TRACKER] carries the channel it came from.
10. Daily and monthly sponsored budget caps are set per role.
11. Referral request sent to the entire team the same day, naming the role, the ideal profile, and the bonus amount.
12. Calendar reminders created: refresh at day 7, review performance at day 14, decide whether to kill or rewrite at day 21.

10.3 Cadence, Refresh, and Kill Rules

Checkpoint	Action
Day 7	Review applicant volume and qualified rate. If volume is fine but the qualified rate is under 10%, the ad is the problem, rewrite the hook, the requirements, and the pay line. If volume is near zero, the problem is placement or pay.
Day 14	Review cost per qualified applicant by channel. Shift budget to the channel producing qualified people. Cut any channel that has produced none.
Day 21	Decide explicitly: continue, rewrite and repost, expand the channel mix, revisit the compensation range, or reconsider the role's design. Do not simply extend. A posting that has run three weeks without a qualified applicant is telling you something specific.

Checkpoint	Action
Weekly, always	Refresh or bump the posting so it does not sink in date-sorted results. Re-send the referral ask with a status update, teams stop referring when they never hear what happened.
At Acceptance	Pull every posting down within 24 hours and stop all sponsored spend. Then close out every remaining candidate within 48 hours.

11. Resume Review

Resume review has exactly one purpose: eliminate on written criteria, quickly and consistently, so that human attention goes to the people who might be hired. It is not where you select. It is where you narrow.

The Two Rules of Resume Review

Rule 1: Only written criteria eliminate. If a criterion is not on the scorecard's non-negotiables list, it cannot remove anyone. That includes writing quality and the answers to your application screener questions, if you intend to eliminate on those, put them on the non-negotiables list so they are written criteria too. This protects you legally and it protects you from your own biases, which are most active when you are moving fast.

Rule 2: One business day, always. Review as applications arrive, not in a weekly batch. The candidate who applied Tuesday and heard nothing until the following Monday has already scheduled two interviews elsewhere.

11.1 Knockouts: First Pass, Sixty Seconds per Resume

Check only these. Anything failing a knockout is declined, with a courteous note, same day.

- Required license, certification, or credential is present and current.
- Minimum verified years in the specific work named on the scorecard.
- Geography and schedule are workable as posted.
- Answers to the application screener questions are complete and pass.
- The application is for this role and answers whatever the ad specifically asked for.

11.2 The Six-Minute Review: Second Pass

Survivors of the knockout pass get up to six focused minutes and a score on the sheet in Appendix C. Sort into three piles and do not create a fourth.

Pile	Definition and action
Advance	Clears every knockout and scores 7 or higher of 10. Book a screening call within 48 hours.
Hold	Scores 5–6. Interesting but unproven on something specific. Keep warm with a real email; revisit if the advance pile does not produce a hire. Do not let this pile become a graveyard — every hold gets a decision within 14 days.
Decline	Fails a knockout or scores 4 or below. Send the courteous decline the same day. These people talk to each other, and some of them will be right for a different seat next year.

11.3 What to Look For

Signal Worth Weight	Red Flag Worth a Question
Evidence, not adjectives. "Reduced average days-to-demand from 45 to 31" outranks "detail-oriented team player" every time.	**Serial short tenures,** a pattern of eight-to-fourteen-month exits. Ask about it; do not assume. Sometimes the answer is three consecutive firm closures.
Tenure pattern. Two to four years per role with visible reasons for each move. Look at the pattern across the whole resume, not any single job.	**Unexplained gaps.** Note them and ask neutrally on the call. Gaps are common and frequently benign; the answer matters, the gap alone does not.

Signal Worth Weight	Red Flag Worth a Question
Progression. Increasing scope, volume, or responsibility, including within a single employer.	**Duty lists with no results.** Suggests presence rather than performance. Probe with the Four Proofs.
Named systems. Specific case-management, document, and accounting platforms. Specificity is a proxy for having done the work.	**Title inflation** with no matching scope. "Office Manager" for a two-person office is fine, just calibrate.
Clean writing. For any role that drafts, corresponds with clients, or touches the court, the resume and cover note are your first and cheapest writing sample.	**Errors in the document itself.** Typos, wrong firm name, inconsistent formatting. For detail-critical roles weigh this heavily, but score it on the sheet rather than treating it as an unwritten veto.
A tailored application. Any evidence they read the ad. Rare, and highly correlated with everything you want.	**Generic mass-apply signals.** Cover letter addressed to a different firm, or a note that could have gone to any employer.

What must never eliminate anyone: name, photo, address or neighborhood, school prestige, age or graduation year, gaps you have not asked about, salary history where prohibited, or "something felt off." If it is not a written criterion, it does not get a vote.

12. The Initial Screening Call

Fifteen to twenty minutes, by phone or video, run by [RECRUITING COORDINATOR]. This call exists to protect [HIRING MANAGER]'s calendar. Its job is to confirm the four practical facts that make an interview worth having and to hear how the candidate communicates when they are not reading from a page.

It is **not** a mini-interview. Do not assess capability here; screen for viability.

12.1 The Four Knockouts to Confirm

Knockout	Confirm Explicitly
Compensation	State your approved range out loud and ask directly whether it works. Confirm expectations against it. Do not ask what they currently earn, salary-history inquiries are prohibited in many states and cities, and the question is unnecessary in any case.
Schedule and Location	Days, hours, on-site expectation, commute reality, any court or after-hours coverage.
Availability	Notice period and earliest realistic start date.
Credential	License, certification, or the specific non-negotiable experience, verified verbally, and documented at offer.

12.2 Screening Call Script

Read it close to verbatim the first ten times you use it. Consistency is what makes the scores comparable.

Open — 2 minutes

SAY *"Hi [NAME], this is [YOUR NAME] from [FIRM NAME] — thanks for applying for the [ROLE]. This is a short call, about fifteen minutes. I'll tell you what the role really is, confirm a few practical details, and answer your questions. If it looks like a fit on both sides, the next step is a longer conversation with [HIRING MANAGER]. Sound good?"*

SAY *"In two sentences: [ONE-SENTENCE ROLE PURPOSE], and success in the first year looks like [THE HEADLINE OUTCOME]."*

Confirm the Practical Four — 5 minutes

ASK *"Walk me through your notice period and the earliest you could realistically start."*

ASK *"The schedule is [SCHEDULE] at [LOCATION], with [ANY COVERAGE EXPECTATION]. Does that work for your life as it is right now?"*

ASK *"The range for this role is $[FLOOR] to $[CEILING], based on [BASIS]. Does that fit what you're looking for?"*

ASK *"Confirming on [CREDENTIAL / LICENSE / YEARS IN THE SPECIFIC WORK] — tell me where that stands today."*

Three Questions — 8 minutes

ASK *"Give me the ninety-second version of what you're doing now and what you own in that role." **Listening for:** structure, clarity, ownership language, whether they can be brief.*

ASK *"Of everything you saw about this role, what made you apply to us specifically?" **Listening for:** anything role-specific. "I'm looking for a new opportunity" is a real answer, but a weak one.*

ASK *"What are you looking for that you're not getting where you are now?" **Listening for:** whether what they want is something this seat actually provides. A candidate running from something is fine; a candidate running toward something you don't have is a ninety-day failure.*

Close — 3 minutes

SAY *"What questions do you have for me?"* ***Listening for:*** *whether they ask about the work, the team, and what success looks like — or only about pay and time off.*

SAY *"Here's what happens next. I'm speaking with a few candidates through [DAY]. You'll hear from me either way by [SPECIFIC DAY] — and if it's a yes, I'll have two interview times for you in that same message."*

Decision Rules — Apply Within 24 Hours of the Call

Advance: All four knockouts confirmed and screening score is 7 or higher of 10. Send two interview time options in the same message as the good news.

Hold: Knockouts pass but the score is 5–6. Say so honestly and give a date.

Decline: Any knockout fails, or the score is 4 or below. Send the decline within 24 hours. A candidate who was told they'd hear by Thursday and heard on Thursday will speak well of you regardless of the answer.

The scorecard for this call is Appendix D.

13. The First Interview

Forty-five to sixty minutes, run by [HIRING MANAGER], structured, and identical for every candidate for the role. The structure is the point: unstructured interviews measure rapport, and rapport predicts almost nothing about job performance. A structured interview with written scoring is one of the few interventions in hiring with a genuinely strong evidence base behind it.

13.1 Before the Interview

- Re-read the scorecard, not the resume. You are interviewing against outcomes, not against a document.
- Print the Culture Plus Core 4 question bank for this role, and the scorecard sheet (Appendix E). Interviewing without paper in front of you means scoring from memory, and memory rewards whoever spoke last.
- Confirm the same day: time, format, video link or address, parking, who they will meet, and how long it will take.
- Decide who else is in the room and what specifically each person is assessing. Two interviewers maximum for a first interview; more than that is an interrogation.
- Block ten minutes after the interview to score. Not later that day. Immediately.

13.2 Agenda

Minutes	Block	What happens
0–5	Welcome and frame	Greet, water, set the agenda out loud, state the length, and tell them there will be time for their questions at the end. Say plainly: "I'm going to take notes and ask for specific examples, that's how we run this for everyone."
5–10	Candidate overview	"Give me the two-minute version of your career and how it led you to this conversation." Do not interrupt. You are calibrating how they organize information.
10–40	The Four Proofs	Section 14. Same four questions, same order, every candidate. Probe. Take notes verbatim where you can.
40–48	Role reality and their questions	Describe the job honestly, including the hard parts. Then hand them the floor. What they ask is data.
48–54	Logistics	Reconfirm the range, the schedule, and the start date. Explain the remaining steps and the timeline by specific date.
54–60	Close	Thank them, tell them exactly when they will hear from you, and honor it.

13.3 Interviewer Discipline

Do	Don't
Talk less than 30% of the time. If you are talking more, you are auditioning, not interviewing.	Don't sell before you have assessed. Enthusiasm early corrupts your own judgment and theirs.
Ask for the specific instance. "Tell me about the last time" beats "how would you handle." Hypotheticals measure imagination.	Don't ask anything from the prohibited list in 14.8. Not even conversationally, not even if they raise it first.

Do	Don't
Chase the vague answer. "We improved the process" is not an answer until you know what they personally did.	Don't let a strong first impression end the questioning. The halo is the most reliable interview error there is.
Sit in silence for four seconds after an answer. The second half of the answer is usually the honest half.	Don't compare a candidate to the last person who held the seat. Compare them to the scorecard.
Write down what they said, in their words, before you write your judgment.	Don't discuss the candidate with the other interviewer before both scores are submitted. Whoever speaks first anchors the room.
Score independently and in writing before discussing the candidate with anyone.	Don't hint at an offer or negotiate compensation in the interview. State the range; that is all.

14. Interview Questions

This section has two halves, and they do different jobs. **Culture Plus Core 4** is the pre-work: it tells you which questions to write for this role in this firm. **The Four Proofs** is the frame you listen and score with once you are in the room. Do the first before the ad goes up. Use the second in every interview you ever run.

14.1 Culture Plus Core 4

The exercise has two components. Neither one is a question you ask a candidate — both are questions you answer about **yourself and the role** first. The output is a question bank.

Component One: Culture

Decide, honestly, exactly the kind of person you want in the organization. Once you know what your culture is, write questions aimed at it. The pairing is the whole point:

If your culture is…	Then ask about…
A Grind	Grinding. What their heaviest stretch looked like, how they feel about it, whether they would choose it again.
Family-Oriented	Being family oriented. What that phrase means to them, and what they would expect from a firm that says it.
Come In, Do the Work, Don't Ask a Lot of Questions	Exactly that. How they operate with minimal direction and how they feel about a low-discussion environment.
Political in Nature	That. How they read a room, handle competing interests, and navigate people who disagree.
Philanthropic	That. What they give time to, and whether it is real or resume decoration.

Five to ten questions per cultural value. **The test for a culture answer is that you are looking for someone who answers the questions the way you would answer them**, if the candidate does not answer them correctly, they are probably not a culture fit. And the standing instruction underneath the whole exercise: **do not hire anyone and everyone.**

Keeping the culture component defensible

Four habits keep it on the right side of that line in practice. **Write the culture criteria down before you meet anyone,** a culture standard that only exists in your head is indistinguishable from a preference. **Ask every candidate for the role the same culture questions, in the same order. Score against the written criteria, not against the feeling in the room.** And **be careful with "answers the way I would",** that test is powerful precisely because it is fast, which is also how it drifts into rewarding people who resemble you in ways that have nothing to do with the work.

The practical filter: any culture question you cannot trace to a stated firm value or to the work itself should come off the list.

Component Two: The Core 4

Identify the four primary responsibilities or duties of the position, the four things a candidate could not lack.

Then write **ten questions per duty.** Not ten questions total, ten per item, so the duty gets examined from several angles rather than confirmed by a single answer.

Example for a Director of Operations:

Core 4 duty	Sample questions from the book
Duty 1: Training Up Leaders	"What is your philosophy on training a leader?" · "How important is leadership to an organization and why?" · "How do leaders learn best?" · "Tell me a great leadership training story." · "What role does mentorship play in leadership development?" · "Have you developed a training program before?" · "Does training leaders energize you?" · "What do you look for in an emerging leader?" · "How do you self develop?"
Duty 2: Obsession with Policies and Procedures	"What do policies and procedures mean to you?" · "When is it necessary to create a policy and procedure?" · "Who is responsible for policies and procedures?" · "Have you ever drafted policies and procedures?" · "On a scale of 1–10, where do policies and procedures land in relationship to your skills?" · "How often should they be updated?" · "Walk me through a procedure of a common activity." · "How do you implement policies and procedures into an organization to get compliance?"
Duty 3: Strategic Planner and Thinker	"Tell me of an experience where you planned something — what was it and what was the outcome?" · "What are the differences between steady growth and scaling?" · "How does a law firm scale without creating massive financial crunches?" · "Have you ever written a business plan?" · "How proactive are you at coming up with ideas?" · "What innovative idea have you come up with that changed the organization you worked for?" · "How do you go from idea to implementation?"
Duty 4: Understanding Financials	"What are the key financial reports for a law firm?" · "What's the most important part of a P&L?" · "What is the biggest budget you have ever constructed?" · "How do you balance a budget that plans to invest into growth?" · "How much cash should a law firm have on hand?" · "How does debt play into growing a business?" · "How much debt is too much debt?" · "Have you ever put together an employment budget? A marketing budget?"

What the exercise produces

- **A question bank, not an interview script.** Five to ten questions per cultural value, plus ten per Core 4 duty. You will not ask all of them in one conversation, you are building the pool the interview draws from, and it should be the same pool for every candidate for that role.
- **A sharper job ad and a sharper scorecard.** The four duties are the outcomes. If your Core 4 and the scorecard outcomes in Section 6 are not the same four things said two ways, one of them is wrong.

- **A written culture standard** you can hand to a second interviewer, which is the only way two people assess culture consistently.

Do the exercise once per role, before the requisition is posted. Rerun it when the role changes materially, not for every opening of the same seat. The blank form is at the end of this section.

14.2 The Four Proofs

Culture Plus Core 4 gives you the questions. The Four Proofs gives you what to do with the answers. Four **dimensions**, each with a primary question, a set of probes, and a written scoring anchor. They exist because there are only four ways a hire fails, and each dimension is built to catch one of them.

Proof	The plain version	The question behind the question	The failure it catches
Proof of Capability	CAN they do the job?	Have you personally done this work, at this level, recently, and can you prove it with specifics?	The hire who interviewed beautifully and cannot do the work.
Proof of Drive	WILL they do the job?	When the work is hard, dull, or unsupervised, what do you do?	The capable hire who does not perform. Skill without drive.
Proof of Fit	Do they FIT how we work?	Do you thrive in the environment we have, and can you take correction?	The capable, driven hire who is wrong for how the firm operates and leaves at month seven.
Proof of Motive	WHY are they available, and why us?	Is the story consistent, is the motivation real, and does what you want match what we offer?	The hire who was solving a short-term problem and leaves as soon as it is solved.

Where the Culture Plus Core 4 Questions Land

Core 4 duty questions → mostly Proof of Capability, with the better ones also testing Drive. "Does training leaders energize you?" is a Drive question wearing a duty question's clothes.

Culture questions → Proof of Fit. This is the dimension the exercise strengthens most, because it replaces a vague sense of fit with a written standard.

Neither component covers Proof of Motive. Why this person is available and why they chose you. Add it yourself. It is the cheapest predictor of a short tenure there is, and it takes four minutes.

The Core 4 is the four duties of the role; the Four Proofs are the four things you have to prove about a person. One is about the job. The other is about the human being applying for it. You need both.

14.3 Proof of Capability — can they do the job?

ASK *"Walk me through the last time you [THE CENTRAL TASK OF THIS ROLE] from start to finish. Set the scene for me — what was the situation, what did you personally do, and how did it turn out?"*

Probes: Use until you have specifics

- "What was the volume? How many files, matters, calls, or dollars?"
- "What systems and software were you working in?"
- "Which parts did you own outright, and which did someone else handle?"

- "Where did that go wrong, and what did you do about it?"
- "If you ran that again tomorrow, what would you do differently?"
- "Teach me the part of this work that most people get wrong." **This one is the tell.** People who have genuinely done the work have opinions about how it goes wrong. People who have not, do not.

Listening for

- First-person ownership. "I drafted," "I called," "I decided" — not "we," "the team," "it was handled."
- Numbers offered without being asked.
- Detail at the right altitude, the texture of someone who has held the file.
- A real mistake, described without defensiveness, with the correction attached.

Red flags

- Describes how the work should be done in general rather than an instance of doing it.
- Cannot quantify anything, on any question.
- Every accomplishment is collective; nothing is theirs.
- Resume claims a depth of experience that the story cannot support. Believe the story, not the resume.

14.4 Proof of Drive — will they do the job?

ASK *"Tell me about the busiest, hardest stretch you've had at work in the last two years. What did your actual day look like, and how did you decide what got done and what got dropped?"*

Probes

- "Who set the standard you were working to — you, your manager, or the client?"
- "Tell me about a goal you set for yourself, that nobody asked you to set. What happened?"
- "Tell me about a time you missed something important. Walk me through what you did next."
- "What's a task in your current role that you find genuinely tedious, and how do you handle it?" **The tedious work is where drive is visible.** Anyone can be motivated by the interesting parts.
- "What did you do in that stretch that nobody asked you to do and nobody would have noticed?"

Listening for

- Self-imposed standards. The strongest answers describe a bar the candidate set for themselves.
- A real prioritization method, even a crude one. Someone who has been genuinely busy has a system.
- Ownership of the miss, plus a specific behavior change afterward.
- Realism about tedium. "I don't mind it, I just put it at the start of the day" is a better answer than "I love everything about the work."

Red flags

- The volume is the villain and they are the victim. Every explanation is external.
- No self-set goal, ever, in the entire work history.
- Cannot name anything they find tedious, which usually means they have not done enough of the job to find its floor.
- Describes stretch periods only as things done to them, never as things they navigated.

14.5 Proof of Fit — do they fit how we work?

Fit means alignment with how the firm actually operates and with your stated values. It does not mean similarity to the people already here, shared background, or whether you would enjoy a drink with them.

ASK *"Tell me about the best manager you've had and the hardest manager you've had. What made the difference for you?"*

ASK *"Now tell me about a time you got feedback that stung. What did you do in the thirty days after?"*

Probes

- "How do you prefer to be managed — how much direction, how often do you want to check in?"
- "Describe a time you disagreed with a decision and still had to carry it out. What did you do?"
- "What kind of work environment brings out your worst?" Then say honestly whether that describes yours.
- "Tell me about a coworker you found difficult. What did you do about it?" **Listening for** whether they took any action at all before deciding the person was the problem.
- "When you don't know the answer and your manager is unavailable, what do you do?" This one predicts a great deal in a small firm.

Listening for

- Coachability, evidenced by a specific behavior change after feedback. This is the single best predictor of whether a good hire becomes a great one.
- A description of their ideal environment that resembles the one you actually have — not the one you wish you had.
- Fair-mindedness about difficult managers and coworkers. Balance, not bitterness.
- Disagreement handled through the appropriate channel and then executed loyally.

Red flags

- Every previous manager was incompetent and every previous firm was dysfunctional. The common denominator is in the room.
- A feedback story with no subsequent change in behavior — or worse, one where the feedback was simply wrong.
- Describes their ideal environment as the opposite of yours. Believe them. They are telling you the truth.
- Speaks about former colleagues or clients with contempt. It will be your colleagues and clients next year.

14.6 Proof of Motive — why are they available, and why us?

ASK *"Walk me through why you left each of your last three roles, the real reason, in order."*

ASK *"And of everything you've seen about us, what made you apply here specifically?"*

Probes

- "What has to be true twelve months from now for you to say this was a good move?"
- "What would make you turn this role down?" **Ask it.** The answer is more candid than anything else in the interview.
- "What other processes are you in right now, and where are they?" You need to know your timeline, and you need to know it early.
- "What's your compensation expectation, and how did you arrive at that number?" Ask about expectations, never about history.

- "Where do you want to be in three years, and does this role move you toward it?"

Listening for

- A story consistent with the resume and with the screening call. Compare the three.
- A reason for **you** specifically, the practice area, the growth path, something in the ad. Specificity here correlates strongly with staying.
- Comp expectations grounded in something real and inside your range.
- A stated ambition that this seat can serve. If the honest answer is that it cannot, better to know now.

Red flags

- The reason for leaving changes between the screening call and the interview. Note it and probe rather than dismissing, but note it.
- A pattern of eight-to-fourteen-month exits with a different external explanation each time.
- Cannot name one specific thing about your firm.
- The only motivation is money, or the only motivation escapes. Either alone is fragile.
- Comp expectations well outside your range. Address it directly in the room; do not discover it at offer.

14.7 Scoring

Score each Proof 1–5 within ten minutes of the interview ending, in writing, before speaking to any other interviewer. Use these anchors.

Score	Label	Anchor
5	Exceptional	Multiple specific, quantified examples. Volunteered detail. Evidence exceeds what the role requires. You would create a seat for this person.
4	Strong	Clear specific example with a result, offered without heavy prompting. Meets the requirement with room to grow.
3	Acceptable	Gave an example, but it took probing, or the result was thin. Meets the minimum bar. Manageable.
2	Concern	Generic, hypothetical, or collective answers. Could not produce a specific instance despite probing. A gap you would have to actively manage.
1	Disqualifying	Evasive, inconsistent with the record, or a clear values conflict.

The Minimum Bar

3 or higher on all four Proofs. A 2 anywhere is a no, no matter how high the other three are. The Proof you rationalize away in the interview is the one that shows up in month four.

4 or higher on Proof of Capability and Proof of Drive. These two are the load-bearing Proofs, and a 3 on either is a gap you would be coaching all year.

Weighting by tier applies to the close calls, not to the floors. The floors above are fixed for every tier. Within them: at T1 let Drive and Fit break a tie, since the task itself is teachable; at T2 weigh all four evenly; at T3–T4 let Capability and Fit break a tie, because the cost of a wrong senior hire is mostly the cost of unwinding it.

Anything less than an enthusiastic yes is a no. "I think they'd probably be fine" has a well-documented outcome and it is not fine.

14.8 Questions You May Never Ask

These are off-limits in every interview, on every call, and in every casual hallway conversation, including when the candidate volunteers the topic first. Being asked about it socially is not consented to being assessed on it. When a candidate raises one of these, acknowledge warmly and redirect to the job.

Topic	Never ask	You may ask
Sex, Sexual Orientation, Gender Identity	Anything. Sex has always been protected under Title VII, and sexual orientation and gender identity are protected under it as well following Bostock v. Clayton County (2020). Do not ask, and do not infer from pronouns, name, appearance, or a spouse's name.	Nothing.
Age	Date of birth, graduation year, "how much longer do you plan to work?"	Whether they are over the legal minimum age for the role, where relevant.
Family and Marital Status	Married? Children? Childcare arrangements? Planning a family? Pregnant?	Whether they can meet the attendance, schedule, and travel requirements of the role, asked of every candidate identically.
Disability and Medical	Any disability, condition, medication, past workers' compensation claim, or sick-day history.	Whether they can perform the essential functions of the job, with or without reasonable accommodation.
National Origin and Citizenship	Where were you born? Is English your first language? What is your citizenship?	Whether they are authorized to work in the United States. Ask this of every candidate identically. Treat any sponsorship question with care and counsel guidance, federal law prohibits discriminating on the basis of citizenship or immigration status, and using the answer to prefer or exclude workers can itself be a violation. Complete the I-9 at hire.
Religion	Religious affiliation, or availability for weekend work framed around religious observance.	Whether they can work the schedule the role requires, stated plainly and asked of everyone.
Race, Color, Ethnicity	Anything. Including proxies, neighborhood, "where are you from originally."	Nothing.
Arrests and Convictions	Arrest history. Many jurisdictions also restrict when and how you may ask about convictions at all.	Follow your state and local ban-the-box rules. Where permitted, ask about convictions only after a conditional offer, and assess individually against the role.
Salary History	What do you currently earn? What did you earn before?	What are your compensation expectations for this role? State your

Topic	Never ask	You may ask
		range first.
Genetic and Family Medical History	Family medical history of any kind.	Nothing.
Military Discharge	Type or circumstances of discharge.	Skills and training acquired in service that relate to the role.
Organizations	Clubs or associations that would reveal protected characteristics.	Professional associations and memberships relevant to the role.

Ask the same questions, in the same order, of every candidate for a role. Consistency is simultaneously the best defense if a decision is ever challenged and the only way scores mean anything when you compare them. If you deviate for one candidate, note why in the file.

14.9 Culture Plus Core 4 — Worksheet

Role	
Completed by / date	

Component One: Culture

What is our culture, stated honestly? Not the aspiration. The thing a candidate would actually walk into on their first Tuesday.

The cultural values we will interview against — and five to ten questions for each. Every candidate for this role gets the same questions in the same order.

Cultural value	Questions (5–10 each)

Component Two: The Core 4

The four duties that, if this person did not possess them, would drive you insane. Ten questions each. These four should match the scorecard outcomes in Section 6.

Core 4 duty	Questions (10 each)
Duty 1	
Duty 2	
Duty 3	
Duty 4	

15. The Second Interview

The second interview is not the first interview again. It has three jobs, in this order: **verify the work** with a real sample, **expose the candidate to the people and reality** they will live with, and **sell**, because by this point you are choosing between two good candidates and so are they.

15.1 When It Is Required

Tier	Second interview	Rationale
T1	Not required.	One structured interview plus a short practical task is sufficient and a second round costs you good candidates to faster employers. Do the practical task in or immediately after the first interview.
T2	Optional. Required if the role has unsupervised client contact, handles money, or has direct deadline authority on a file.	The exposure is what justifies the extra round. A bookkeeper and a case manager get one; a legal assistant supporting a supervised team may not need one.
T3	Required.	Licensed and professional roles carry too much client and malpractice exposure to decide in a single conversation. Include at least one interviewer from outside the department.
T4	Required, plus a presentation round.	Leadership hires should be assessed on judgment and on how they think in front of people, which only shows up when they must prepare something and defend it.

15.2 What the Round Contains

Component	How to run it
Practical Assessment	A work sample drawn from the actual job. This is the highest-value single component in the entire process. Score it against a written rubric before you discuss it. Keep it under 60 minutes; if the task must run longer, pay the candidate for their time at a fair rate and say so upfront.
Panel Conversation (45 Min)	One peer, one cross-department person, and [HIRING MANAGER]. Assign each panelist two of the Four Proofs so you are not asking the same questions three times. Panelists score independently.
Meet The Team and See the Space	Twenty minutes, unscripted, no evaluators in the room. It tells the candidate the truth about you and it tells you how they behave when they think they are off the clock. Ask your team afterward for a single reaction, and treat it as information, not a vote.
Values and Expectations Deep Dive	Walk through the scorecard outcomes line by line and ask directly: "Is this something you want to be measured on?" Their hesitation is more valuable than their agreement.
Reverse Interview	"What haven't we asked that you'd want us to know? What concerns do you still have about us?" Strong candidates use this well, and their concerns are usually accurate.

15.3 Practical assessment ideas by tier

Tier	Sample tasks
T1	Answer three simulated client calls, one of them from an upset caller. Draft a short client email from bullet notes. Data-entry accuracy check against a source document. Sort a stack of correspondence into the right files.
T2	Review a redacted file with three errors deliberately planted and report what they find. Build a case chronology from a set of records. Draft a status-update letter to a client. Reconcile a small deliberately imperfect ledger. Triage a list of eight competing tasks and defend the order.
T3	A short memo on a fact pattern from your practice area. A mock client consultation with a staff member role-playing. Review a draft pleading or demand and mark it up. Walk through how they would handle a specific ethical grey area.
T4	A 30-60-90 day plan for the role, presented to two or three people and defended. A diagnosis of an anonymized operational problem in your firm with recommendations. A staffing or budget decision case study with a written recommendation.

Rules for practical assessments

Use real work, not puzzles. The point is predicting job performance, and the best predictor of doing the job is doing the job.

Give the rubric to the scorer before the candidate submits. Grading criteria invented after you see the work will find whatever you already believed.

Never use free candidate labor. Do not ask for work you will actually use. Redact, anonymize, and use closed matters or invented fact patterns. Beyond the ethics, it destroys your reputation among exactly the people you most want to hire.

Pay for anything over an hour, at a fair rate, and offer it without being asked. It is the strongest possible signal about how you treat people.

The rubric template is Appendix F.

15.4 The Decision Meeting

Thirty minutes, scheduled in advance for a specific time, and it ends with a decision.

1. Every interviewer submits written Four Proofs scores and any rubric scores **before** the meeting starts. No exceptions and no verbal-only participants.
2. [HIRING MANAGER] reads the scorecard outcomes aloud, the actual outcomes, from Section 6, to re-anchor the room on the job rather than on the candidates.
3. Go dimension by dimension, not person by person. Compare all candidates on CAN, then all on WILL, and so on. Person-by-person invites the halo; dimension-by-dimension surfaces real differences.
4. Surface every disagreement of two points or more and resolve it with evidence, a quote from the interview, a line in the work sample, not with volume or seniority.
5. Take the vote. Anything short of an enthusiastic yes from everyone is a no.
6. If the answer is no on all candidates, say so plainly and reopen the search. **Hiring the best of a weak pool is the most expensive decision available to you,** and the pressure to make it is highest exactly when you should resist it.
7. If the answer is yes: name the lead candidate, name the backup, and set the offer in motion the same day.

16. References, Verification, and Background Checks

Two checks, in this order, and neither one is a formality. References are where you learn whether the story you were told is the story that happened. Background checks are where a specific compliance sequence has to be followed exactly.

16.1 Reference Checks

Two references minimum, and **both must be former direct supervisors**, not peers, not clients, not friends.

- Run them by phone, not email. Email references produce nothing but confirmations of employment. Tone on a phone call carries more information than any sentence in it.
- Ask the candidate's permission and tell them when you are calling. Do not contact a current employer without explicit consent, you can jeopardize their job.
- Twelve minutes each. Use the same six questions every time. The form is Appendix G.

The Reference Script

SAY *"[NAME] is a finalist for a [ROLE] position with us and gave me your name. Do you have ten minutes? I have six questions and I'll keep to them."*

ASK *"In what capacity did you work together, over what period, and what did they own?"* ***Confirms the resume.***

ASK *"What did they do better than anyone else on your team?"*

ASK *"Where did they need the most support or supervision?"* ***If the answer is "nowhere," ask again differently.*** *Every real supervisor has an answer to this.*

ASK *"How did they respond when you gave them critical feedback?"* ***The highest-value question on the list.***

ASK *"On a scale of one to ten, how would you rate their overall performance?" — then, whatever the number, "What would have made it a ten?"* ***The follow-up is where the real answer lives.***

ASK *"Would you hire them again, if you had an opening today?"* ***Then wait.***

Reading references. Reference calls skew positive, so read the deltas rather than the adjectives: hesitation, careful phrasing, a policy of "we only confirm dates," a rating of seven from someone who described them glowingly. And note whether what you hear matches the Four Proofs story you were told. Contradiction between the candidate's account and the supervisor's account is the finding you ran the check for.

16.2 Background Checks

Three separate bodies of law govern this stage, and it is worth keeping them straight. **The federal Fair Credit Reporting Act** governs how you obtain and act on a report from a third-party screening company, Steps 1, 3, and 5 below. **State and local ban-the-box law** governs when you may ask about criminal history at all, which is why Step 2 exists. **EEOC guidance and state law** drive the individualized assessment in Step 4.

1. **Disclose and authorize.** Provide a clear, standalone written disclosure that a consumer report may be obtained for employment purposes, and get written authorization. The disclosure must be its own document.
2. **Order only after a conditional offer,** and only on the finalist. Running checks on every applicant is expensive, invites problems, and in many jurisdictions is unlawful.
3. **Pre-adverse action.** Before you decide against someone based on the report, send a pre-adverse action notice with a copy of the report and the CFPB's summary of rights, and give them a reasonable window, commonly five business days, to dispute or explain.

4. **Individualized assessment.** Where a record surfaces, assess it against this specific role: what it was, how long ago, what the person has done since, and whether it genuinely bears on this job. Blanket exclusions draw scrutiny and are prohibited outright in some jurisdictions.
5. **Adverse action.** If you still decide against, send the final adverse action notice. Under FCRA it must include the screening company's name, address, and telephone number; a statement that the screening company did not make the decision and cannot explain it; notice of the right to a free copy of the report from that company within 60 days; and notice of the right to dispute its accuracy.
6. **Verify credentials separately.** Bar admission and standing, certifications, and education verify directly with the issuing body. For any licensed role, do this before the offer letter goes out, every time, without exception.

17. The Offer

Offers are lost in the gap between the decision and the conversation. Two rules govern this entire stage: **the offer is delivered by voice, by the hiring manager, the same day the decision is made**, and the written letter follows within twenty-four hours.

17.1 Pre-Offer Checklist

- Compensation approved by [APPROVER], with a defined negotiation ceiling agreed **before** the call. Decide your walk-away number in advance; deciding it live is how firms overpay.
- Two supervisor references completed and documented.
- License, certification, and education verified directly with the issuing body.
- Exempt or non-exempt classification confirmed and documented.
- Start date, schedule, and reporting line settled internally.
- Benefits eligibility dates confirmed with your carrier or broker so you can answer precisely.
- Offer letter drafted and reviewed. Any state-required wage notice prepared alongside it.
- Backup candidate identified and kept warm until the signature is in hand.

17.2 The Verbal Offer

Called by [HIRING MANAGER]. Never delegated to email. Five minutes.

SAY *"[NAME], I'm calling with good news — we'd like you to join [FIRM NAME] as our [ROLE]. I wanted to tell you myself."*

SAY *"Here are the terms: [ROLE TITLE], reporting to [MANAGER]. Compensation is $[AMOUNT] [per hour / annually], paid [FREQUENCY], and the position is [exempt / non-exempt]. [BENEFITS SUMMARY WITH ELIGIBILITY DATES]. [PTO]. We'd want you to start [DATE]."*

SAY *"The reason we chose you is [ONE SPECIFIC, TRUE THING FROM THE PROCESS]. That mattered to us."* ***Do not skip this line.*** *It is the cheapest and most durable thing you will do for retention all year.*

SAY *"I'm sending the written offer within twenty-four hours. It's contingent on [BACKGROUND CHECK / REFERENCES / LICENSE VERIFICATION / I-9]. I'd like your answer by [DATE — three business days out]. What questions do you have right now?"*

SAY *"And be straight with me, is there anything that would make you hesitate?"* ***Ask it.*** *You would far rather hear the objection now than receive a decline on Thursday.*

Handling the negotiation

Expect one. A candidate who negotiates well is usually a candidate who will advocate well for your clients.

Know your ceiling before the call, in writing. If they ask above it, say so plainly and move to the levers that are not base pay: start date, PTO, schedule flexibility, a signing bonus, a CLE or certification budget, a scheduled review at six months with defined criteria, or a title.

Never make a verbal commitment you have not cleared. "Let me confirm that and come back to you within four hours" is always available, and four hours is fast enough.

If they ask for more than the role is worth, decline cleanly and keep the relationship. Overpaying to close creates a compensation problem inside your own team that outlasts the hire.

17.3 Offer Letter Template

Have your employment counsel review this before first use and after any change in your state's law. The bracketed language is a starting point for that review, not a substitute for it. State-specific requirements, wage notices, pay-transparency statements, paid-leave disclosures, are not included here and vary significantly.

[FIRM LETTERHEAD]

[DATE]

[CANDIDATE NAME]
[ADDRESS]

Dear [FIRST NAME],

On behalf of [FIRM NAME] (the "Firm"), I am pleased to offer you the position of **[JOB TITLE]**. We were impressed by [ONE SPECIFIC THING], and we are looking forward to having you on the team.

Position and reporting.

You will serve as [JOB TITLE], reporting to [MANAGER NAME AND TITLE], working from [LOCATION / HYBRID OR REMOTE ARRANGEMENT]. Your regular schedule will be [DAYS AND HOURS]. Your duties are described in the attached job description, which may be modified by the Firm as its needs change.

Start date.

Your anticipated first day is [DATE].

Compensation.

You will be paid at the rate of $[AMOUNT] per [hour / year], paid [weekly / biweekly / semi-monthly] in accordance with the Firm's standard payroll practices and subject to all applicable withholdings. This position is classified as [exempt / non-exempt] under the Fair Labor Standards Act and applicable state law. [FOR NON-EXEMPT: You will be paid overtime at the rate required by the Fair Labor Standards Act and applicable state law for all overtime hours worked. Overtime must be approved in advance; overtime worked without advance approval will still be paid as the law requires, but may be addressed as a performance matter.]

Bonus or incentive compensation.

[DESCRIBE ANY BONUS OR INCENTIVE PLAN, ITS METRICS, ITS TIMING, AND WHETHER IT IS DISCRETIONARY. If there is none, state: You are not eligible for bonus or incentive compensation at this time.]

Benefits.

You will be eligible to participate in the Firm's benefit programs, subject to the terms of the governing plan documents, which control in all cases: [HEALTH / DENTAL / VISION, WITH FIRM CONTRIBUTION AND ELIGIBILITY DATE]; [RETIREMENT PLAN, MATCH, AND ELIGIBILITY DATE]; [PAID TIME OFF — AMOUNT, ACCRUAL, AND START]; [PAID HOLIDAYS]; [OTHER — CLE, BAR DUES, CERTIFICATION, PARKING, PHONE STIPEND]. The Firm may modify or discontinue its benefit programs at any time.

Contingencies.

This offer is contingent upon: (a) satisfactory completion of a background check conducted in accordance with applicable law; (b) satisfactory reference verification; (c) verification of [LICENSE / BAR ADMISSION AND GOOD STANDING / CERTIFICATION / EDUCATION]; (d) your completion of Form I-9 and presentation of documents establishing your identity and authorization to work in the United States within three business days of your start date; and (e) your execution of the Firm's [CONFIDENTIALITY AND CLIENT-INFORMATION AGREEMENT / CONFLICTS DISCLOSURE / EMPLOYEE HANDBOOK ACKNOWLEDGMENT]. Item (d) is completed at or immediately after the start of employment as the law requires, and is a condition of continued employment.

If any contingency is not satisfied, this offer may be withdrawn — or, if you have already begun work, your employment may end — in either case without further obligation by the Firm.

Confidentiality and professional obligations.

You acknowledge that your work will involve confidential and privileged client information, and you agree to comply with the Firm's confidentiality policies and with all applicable rules of professional conduct. You further confirm that you are not subject to any agreement or obligation that would restrict or conflict with your employment by the Firm, and that you will not bring to the Firm or use any confidential information belonging to a former employer.

At-will employment.

Your employment with the Firm is at will. This means that either you or the Firm may terminate the employment relationship at any time, with or without cause and with or without notice. Nothing in this letter, and no statement by any representative of the Firm, creates a contract of employment for any specific period or guarantees employment for any length of time. The compensation stated above is expressed as an annualized rate for convenience only and does not imply employment for any fixed term. This at-will relationship may be modified only by a written agreement signed by [FIRM PRINCIPAL TITLE].

[NOTE FOR THE DRAFTER, NOT THE CANDIDATE: at-will employment is not available in the same form in every state — Montana's Wrongful Discharge from Employment Act limits it after a probationary period. Have counsel adapt this paragraph to your state.]

Entire agreement.

This letter, together with the documents referenced in it, sets out the complete terms of our offer and supersedes any prior discussions, representations, or offers, whether written or verbal.

Accepting the offer.

If these terms are acceptable, please sign and return this letter by [DATE — three business days out]. If we do not receive it by that date, this offer will expire.

We are glad you are joining us, and we are looking forward to your first day.

Sincerely,

[NAME], [TITLE] — [FIRM NAME]

Accepted and agreed:

Signature

Printed name

Date

Confirmed start date

[ATTACH: job description · [STATE-REQUIRED WAGE NOTICE, IF APPLICABLE] · benefits summary · required agreements]

17.4 Offer Letter Cautions

- **Never omit the at-will language,** and never undercut it elsewhere in the letter with words like "permanent," "career," "job security," or "annual salary" presented as a guaranteed sum. Express pay as a rate, and say explicitly that annualizing it implies no fixed term.
- **Say "eligible to participate in" rather than promising benefits.** Plan documents govern, and a letter that promises more than the plan delivers is a problem you will meet later.
- **State the classification and be right about it.** Exempt status turns on duties and salary level, not on title or on the employee's preference. Support staff are misclassified as exempt constantly, and it is one of the most expensive routine errors in small firms.

- **Keep contingencies in the letter and order the background check only after it goes out.** A background check run before a conditional offer creates avoidable exposure under several state schemes.
- **Check your state's notice requirements.** Several states require a written wage notice at hire with specified content, and some require it to be signed and retained. Some jurisdictions also require pay-scale disclosure on request.
- **Use a real expiration date, three business days out.** Longer invites shopping; shorter reads as pressure and costs you good people.
- **Never mention anything discussed about protected characteristics,** and never reference a candidate's family, health, age, or origin anywhere in the file.

17.5 If the Offer is Declined

1. Ask why, once, warmly, and without argument. "Would you be willing to tell me what tipped it? It genuinely helps us." Log the answer, three of these in a row is a compensation or process finding, not bad luck.
2. Do not counter reflexively. Counter only if the gap is real, within your approved ceiling, and the decline was about money rather than about fit.
3. Go to your backup candidate the same day, and go with genuine enthusiasm. Nobody wants to be told they were second.
4. If there is no viable backup, reopen the search rather than lowering the bar. Then look hard at the funnel, a decline at the offer stage almost always means pay, speed, or how the process felt.
5. Keep the relationship. Add them to the bench list. A meaningful share of candidates who decline are available again within a year or two, and they already know you.

17.6 Closing Out Everyone Else

Within forty-eight hours of the acceptance, every remaining candidate gets a real message from a real person, including everyone you interviewed. Not a form letter and never silence.

- Anyone who reached a second interview gets a phone call. They spent hours on you.
- Name something specific and true you appreciated, and say whether you would welcome a future application.
- Ask the strongest two or three whether you may keep them on the bench list, and then actually keep in touch.
- Pull every posting down and stop all sponsored spend the same day.

18. Handoff to Onboarding

Your 90-day retention KPI is decided here, not at the interview. A signed offer followed by two weeks of silence is the most common cause of a first-day no-show and a large share of ninety-day failures.

18.1 Within 48 hours of signature

- A welcome message from [HIRING MANAGER], not from HR, and not automated.
- Day-one logistics: arrival time, where to park, who to ask for, what to bring, what to wear, and where lunch is coming from.
- Equipment and access ordered: computer, phone, email, case-management and document system credentials, keys or badge, business cards.
- Payroll and new-hire paperwork sent for completion before day one: W-4, state withholding, direct deposit, I-9 documentation list, handbook acknowledgment, benefits enrollment, any required state wage notice.
- Day-one and week-one schedules built and shared, with named people in named blocks.
- The internal announcement drafted, and the team told who is arriving, when, and what they will own.

18.2 The Pre-Start Touchpoints

One human contact per week between signature and start date. A two-minute message is sufficient; silence is what does the damage.

18.3 Checkpoints That Close The Loop

When	What happens
Day 1	Manager spends the first hour with them personally. Scorecard reviewed together, out loud, the same document they were hired against. No exceptions and no delegation.
Day 7	Thirty minutes: "What has surprised you? What do you need? What is unclear?"
Day 30	Formal check against the day-30 scorecard milestone. [HIRING MANAGER] records their satisfaction rating for the hiring KPI. Address any gap now, a gap named at day 30 is coachable; the same gap at day 90 is a decision.
Day 60	Progress against the day-90 outcome, with a written plan to close any distance.
Day 90	Formal review against the scorecard. Record the 90-day retention KPI and the manager satisfaction rating. **Then run the hiring post-mortem:** what did the process predict correctly, what did it miss, and which stage needs to change before the next search? Update this SOP accordingly.

19. Compliance and Records

This section is a checklist of the places where recruiting creates legal exposure in a small firm. It is not legal advice, requirements vary by state and city, and several of these areas have changed recently. Have counsel confirm each item for your jurisdiction.

19.1 Guardrails

Area	The Standard to Hold
Consistency	Same questions, same order, same scoring criteria, same process for every candidate for a given role. Document any deviation and why. Consistency is both the best evidence of a fair process and the only way scores are comparable.
Job-Related Criteria Only	Every screening criterion, interview question, and assessment must relate to the essential functions in the job description. If you cannot point to the line in the JD it comes from, remove it.
Pay Transparency	A growing number of states and cities require a good-faith compensation range in the posting itself, and some require disclosure on request. Confirm your rules and include the range.
Salary History	Prohibited in many states and municipalities. The simplest safe practice is to never ask, anywhere. Ask about expectations after stating your range.
Ban-The-Box and Conviction Inquiries	Many jurisdictions restrict when you may ask about criminal history, what you may consider, and how far back you may look. Default to asking only after a conditional offer and always assess individually.
Background Checks	Follow the FCRA sequence in Section 16 exactly: standalone disclosure, written authorization, pre-adverse action with a copy of the report and the summary of rights, a reasonable dispute window, then final adverse action.
Accommodations	Include accommodation language in every posting and grant reasonable accommodation for any part of the process, interviews, assessments, testing, when requested. Never ask what the underlying condition is.
Assessments and Tests	Use only validated, job-related instruments. Apply them identically to every candidate for the role. Never use a personality or behavioral instrument as the deciding factor, and confirm the instrument is lawful for selection use in your jurisdiction.
Classification	Determine exempt versus non-exempt on duties and salary level, and independent contractor versus employee on the applicable legal tests, not on preference or convenience. Document the basis.
I-9 and Work Authorization	The employee completes Section 1 **no later than their first day of employment,** it may be done any time after they accept the offer, but not later than day one. The employee then presents acceptable documents and the employer completes Section 2 **within three business days of the first day of employment**. Never request documents before hire, and never specify which documents the employee must present. Several states also mandate E-Verify for employers over a size threshold, check yours.
Interview Notes Are Records	Anything written during hiring is discoverable. Write only job-related observations. Never note anything about a candidate's family, health, age, origin, religion, or appearance, not even neutrally, not even as a memory aid.
Referral Programs and Diverse Pools	Referral-heavy hiring tends to reproduce the composition of the current team. Keep the referral program and pair it with at least one open channel per search.

Area	The Standard to Hold
Confidentiality	Candidate information is confidential. Restrict access to the people in the process. Do not circulate resumes firm-wide.

19.2 Records Retention

General federal guidance is below. Several states require longer periods, and any record relevant to a charge, claim, or audit must be preserved from the moment you are aware of it, regardless of these schedules. Confirm your own retention schedule with counsel and then write it down.

Record	Typical Minimum	Notes
Applications, resumes, interview notes, scorecards, and records of the decision for candidates not hired	1 year from the date of the employment action	Federal contractors are generally held to longer periods. Several states require more. Keep the whole file together, including the notes.
Job Postings and Advertisements	1 year	Keep a dated copy of every version of every ad. Useful for your own diagnosis as well as for compliance.
I-9 Forms	3 years after hire, or 1 year after separation, whichever is later	Store separately from the personnel file.
Payroll and Time Records	3 years (FLSA); supporting wage-computation records 2 years	State requirements are frequently longer.
Background Check Authorizations and Reports	Per FCRA, state law, and your vendor agreement	Store separately from the personnel file, with restricted access.
Offer Letters and Signed Agreements	Duration of employment plus the longest applicable limitations period	Counsel should set this number for your state.
Medical and Accommodation Records	Separate confidential file, always	Never in the personnel file. Access limited to those with a need to know. A supervisor may be told the work restrictions and the accommodation being provided, never the underlying condition or diagnosis.

Keep the files even when you are not required to

Beyond compliance, your archive of past applicants is the cheapest qualified pool you will ever have. The runner-up from nine months ago is frequently available, already screened, and already familiar with you.

A tracker you can search by role and by year turns every completed search into an asset for the next one.

20. Appendices — Forms

Print or duplicate these. Every one is designed to be filled in by hand or on screen and filed with the candidate record. The offer letter template lives in Section 17.3.

Appendix A: Requisition Approval Form

Role Title	
Tier (1 / 2 / 3 / 4)	
Hiring Manager	
Reason For Opening (Growth / Replacement / Restructure)	
Approved Compensation Range — Floor / Target / Ceiling	
Classification (Exempt / Non-Exempt)	
Status (Full-Time / Part-Time / Contract)	
Location and Schedule	
Target Start Date	
Approved Recruiting Spend Cap	

The Five-Question Test - Attach Written Answers (Section 5):

1. What outcome is not happening today, and what is it costing per month?
2. What process, technology, or reassignment fix did we try first?
3. What does this role produce that pays for itself?
4. Who manages this person, and do they have capacity?
5. Can we fund the loaded cost for twelve months in a slow quarter?

Approved by / date

Appendix B: Role Scorecard

Role and Tier	
Mission (Why the Seat Exists)	

Outcome 1 (Measurable, With a Date)	
Outcome 2	
Outcome 3	
Outcome 4 (Optional)	
Outcome 5 (Optional)	
Competencies (5–7 Observable Behaviors)	
Non-Negotiables (2–4 — These Are the Only Criteria That May Eliminate a Candidate)	
What This Role Is Not	
Day-30 Milestone	
Day-90 Outcome	

Appendix C: Resume Screening Sheet

Candidate: ________________________ Role: ________________________ Source: ________________________ Date reviewed: _____________

Knockouts — all must pass.

Required license, certification, or credential present and current	Yes / No	
Minimum verified years in the specific work on the scorecard	Yes / No	
Geography and schedule workable as posted	Yes / No	
Application screener questions complete and passing	Yes / No	
Application is for this role and shows evidence of having read it	Yes / No	

Score — 2 points each, 10 total.

Criterion	0	1	2	Note
Evidence of results, with numbers, not adjectives				

Criterion	0	1	2	Note
Depth of directly relevant experience				
Tenure and progression pattern				
Named systems and software relevant to the role				
Quality of writing in the resume and any cover note				

Total: ______ / 10 → **Advance** (7–10, book screening call within 48 hours) · **Hold** (5–6, decision within 14 days) · **Decline** (0–4, notify same day)

Appendix D: Screening Call Scorecard

Candidate: ________________________ Role: ________________________ Call date: _____________ Length: ______ min

Knockouts (Confirm all four)

Knockout	What they said	Pass?
Compensation: range stated, expectations confirmed		Y / N
Schedule and location		Y / N
Availability and start date		Y / N
Credential or non-negotiable experience		Y / N

Score (2 points each, 10 total)

Criterion	0	1	2	Note
Clarity and structure of communication				
Ownership language when describing current work				
Specific, role-relevant reason for applying here				
What they want matches what this seat provides				
Quality of the questions they asked				

Total: ______ / 10 → **Advance** (7+, send two interview times today) · **Hold** (5–6) · **Decline** (0–4, notify within 24 hours)

Notes and anything to verify in the first interview

Appendix E: Four Proofs Interview Scorecard

Candidate: _______________ Role: _______________ Interviewer: _______________ Date: _____________

Complete within ten minutes of the interview ending. Do not discuss the candidate with anyone before this sheet is finished and submitted.

Dimension	Evidence — quote them, in their words	Score (1–5)
Proof of Capability — can they do the job? Specific instance, first-person, quantified.		
Proof of Drive — will they do the job? Self-set standards, prioritization, response to a miss, handling of tedium.		
Proof of Fit — do they fit how we work? Coachability, behavior change after feedback, described environment vs. ours.		
Proof of Motive — why available, why us? Consistency of story, specific reason for us, comp expectations, twelve-month goal.		

Minimum bar: 3 or higher on all four Proofs. 4 or higher on Proof of Capability and Proof of Drive. A 2 anywhere is a no.

Strongest evidence for hiring this person

Strongest evidence against

What must be verified in the next round

Recommendation: Enthusiastic yes · No · Need a specific verification first (state it above)

"Probably fine" is a no. Circle one of the three.

Appendix F: Practical Assessment Rubric

Task: ________________________________ Time allotted: ______ Paid? Y / N Scorer: _______________ Date: _____________

Fill in the criteria and weights **before** the candidate submits. Score without knowing which candidate this is, where that is possible.

Criterion (define what a 5 looks like)	Weight %	Score 1–5	Weighted	Note

Criterion (define what a 5 looks like)	Weight %	Score 1–5	Weighted	Note
Total	100%			

Pass threshold: a weighted average of 3.5 or higher out of 5 — that is, 70%. Below threshold is a no regardless of interview performance — this is the only stage where you observe the work itself.

Appendix G: Reference Check Form

Candidate: _______________ Reference name and title: ________________________ Relationship and dates: ________________________

Candidate's permission confirmed: Y / N   Current employer? Y / N — **if yes, do not call without explicit written consent.**

Capacity, period, and what they owned	
What they did better than anyone on the team	
Where they needed the most support or supervision	
How they responded to critical feedback	
Overall rating 1–10: ______ What would have made it a ten?	
Would you hire them again today? (note any hesitation before the answer)	
Does this match the account the candidate gave us? Any contradiction?	

Appendix H: Recruiting Budget Worksheet

Role: ________________________ Tier: ______ First-year base: $_______________ Spend cap approved: $_______________

Line item	Budgeted	Actual	Note
Job board — sponsored / paid			
Job board — subscriptions or slots			
Association or school postings			
Assessments			
Background check and verifications			
Employee referral bonus			
Agency or recruiter fee			
Events or job fairs			
Signing bonus or relocation			
Internal time (hours × loaded rate)			
Total external			
Total internal			
Cost per hire (total ÷ hires)			
Cost per hire as % of first-year base			

Annual roll-up: total planned hires ______ × 1.3 (decline and re-open factor) = ______ budgeted searches. Always-on pipeline reserve (10–15% of the annual total): $_______________

Appendix I: Candidate Communication Templates

Application acknowledgment — automated, but written like a person

Subject: We got your application — [ROLE] at [FIRM NAME]

Hi [FIRST NAME]! Thanks for applying for the [ROLE]. A real person reviews every application here, usually within one business day, and you'll hear from us either way by [DAY]. If it's a fit, the next step is a short fifteen-minute call. — [NAME], [FIRM NAME]

Decline after resume review

Subject: Your application for [ROLE] at [FIRM NAME]

Hi [FIRST NAME], Thank you for applying for the [ROLE]. We're moving forward with candidates whose experience lines up more closely with [THE SPECIFIC NON-NEGOTIABLE], so we won't be going ahead this time. I appreciate the time you put into applying, and I'd welcome an application from you for a future opening. — [NAME], [FIRM NAME]

Decline after an interview — send within 48 hours, by phone for second-round candidates

Subject: Following up on your interview — [ROLE]

Hi [FIRST NAME], Thank you for the time you spent with us. This was a close decision and we've offered the role to another candidate. What stood out to me about you was [ONE SPECIFIC, TRUE THING]. If you're open to it, I'd like to keep in touch, we expect to be hiring for [RELATED ROLE OR TIMEFRAME] and I'd want you to know about it. — [NAME], [FIRM NAME]

Hold — keeping a candidate warm

Subject: Update on the [ROLE] at [FIRM NAME]

Hi [FIRST NAME]! I want to be straight with you rather than leave you guessing. We're in later-stage conversations with two candidates for the [ROLE], and you're someone we'd genuinely like to keep in the process. I'll have a definite answer for you by [SPECIFIC DATE]. If your situation changes before then, tell me and I'll work with it. — [NAME], [FIRM NAME]

Appendix J: Weekly Recruiting Dashboard

Week of: _____________ Roles open: ______

Role	Days open	New applicants	Qualified	Interviews	Stage

Firm-wide metric this week	Target	Actual	On track?
Hours to first response	≤ 8 business hrs		
Qualified applicant rate	≥ 20%		
Cost per qualified applicant	≤ $150 paid		
Interview no-show rate	≤ 15%		
Candidates stuck in a stage past its clock in Section 4	0		
Referral asks sent this week	≥ 1 per open role		

Biggest bottleneck this week, and who owns fixing it by when

Appendix K: Job Description Template

The internal, formal document described in Section 6.2. This is not your job ad — the ad template is in Section 7.2. Have counsel review your first two or three of these, then reuse the reviewed frame.

Job title	[THE TITLE CANDIDATES ACTUALLY SEARCH FOR]
Department / practice area	
Reports to	[ONE PERSON — TITLE]
Classification	[Exempt / Non-exempt] · [Full-time / Part-time / Contract] · Basis for the determination: [DUTIES AND SALARY LEVEL ANALYSIS — have counsel confirm]
Compensation range	$[FLOOR] – $[CEILING] [per hour / annually]. Basis: [VERIFIED EXPERIENCE / CREDENTIALS / MARKET DATA]
Location and schedule	[LOCATION] · [DAYS AND HOURS] · [ON-SITE / HYBRID / REMOTE] · [ANY COURT, ON-CALL, OR AFTER-HOURS COVERAGE]
Position summary	[TWO OR THREE SENTENCES, DRAWN FROM THE SCORECARD MISSION IN APPENDIX B.]
Essential functions	[ACTION VERB + DUTY. Estimate % of time on the top three.] […] […] [Include only what is genuinely essential — this section anchors any reasonable-accommodation analysis.]
Performance outcomes	[LIFT THE 3–5 MEASURABLE OUTCOMES STRAIGHT FROM THE SCORECARD, NUMBERS INTACT. This is what makes the JD usable at review time.]
Required qualifications	[ONLY WHAT YOU WOULD GENUINELY REJECT AN EXCELLENT CANDIDATE OVER. Each line must be defensible.]
Preferred qualifications	[THE WISH LIST — clearly labeled as preferred, never mixed into the required list.]
Systems and software	[CASE MANAGEMENT · DOCUMENT PLATFORM · PHONE SYSTEM · ACCOUNTING · ANYTHING ELSE THEY MUST USE DAILY]
Supervisory responsibility	[NUMBER OF DIRECT REPORTS, OR "NONE"]
Physical and environmental demands	[STATED FACTUALLY AND ONLY WHERE ACCURATE — e.g. lifting, sitting, driving, courthouse travel.]
Travel	[FREQUENCY AND TYPE, OR "NONE"]
What this role is not	[THE BOUNDARY — prevents scope creep and month-two disappointment.]
EEO and accommodation	[YOUR COUNSEL-APPROVED LANGUAGE]

statement	

Acknowledgment. This description outlines the general nature and level of work expected and is not an exhaustive list of all duties; duties may be modified as the Firm's needs change. It does not constitute a contract of employment.

Employee signature / date

Supervisor signature / date

Date last reviewed by counsel

Document control

Owner: [RECRUITING COORDINATOR] · Approver: [APPROVER] · Version: 1.0 · Effective: ____________ · Next review: ____________

Review this SOP after every third hire and at least annually. The day-90 post-mortem in Section 18.3 is what feeds those revisions — a process that is never edited is a process nobody is using.

The People Playbook: Book One Recruiting and Hiring · Book Two Onboarding · Book Three Developing · Book Four Retaining.