Workable Hiring Leader Playbook

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Getting Started

Logging in and Setting Up Your Profile

1. Go to [Workable.com]() and log in.
    a. To do so you will need to use Single Sign-On (SSO) option and use middleburycollege as the domain (see image below).
2. Click on the user menu (your initials) in the top right corner of the page.
3. Click on Settings.
4. Click the "[Your Profile"]()section.
    a. Customize your display name (full name), job title, and time zone.
    b. Upload your photo in the image section.
5. In Your Profile, scroll to the Credentials section and connect to your LinkedIn and Microsoft Accounts.

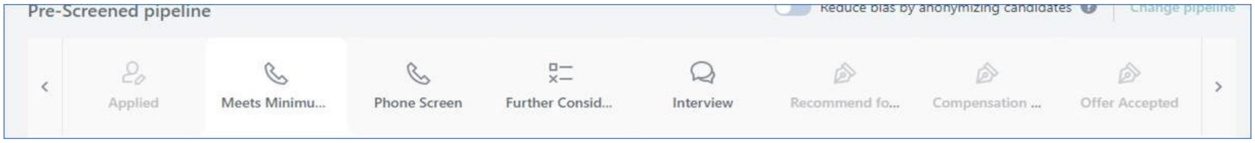
    The Office365 integration will allow you to schedule and invite candidates to interviews within the Workable app using your MS Outlook calendar.

Updating Your Preferences

- Go to [Workable.com]() and log in.
- Click on the user menu (your initials or photo) in the top right corner of the page.
- Click on Settings.
- Click on Your Preferences
    - Enter a custom email signature. This will save you time when sending emails to candidates via Workable.
    - Choose which notifications you wish to receive.
    - Choose interview availability standard days and times.

Workable Terms & Navigation

Candidate Pipeline Explained



- The candidate pipeline captures the various stages within the recruitment process.
- Hiring leaders move candidates through the pipeline to indicate the hiring stage for each candidate. To move a candidate through the pipeline, click on the drop-down on the top right of the candidate's profile and select "move to…"
    - Each stage of the pipeline is tied to reporting metrics and therefore it is important to make sure you move candidates to the appropriate bucket.
- If you are not interested in pursuing a candidate further, use the red hand on the top right of the candidate profile to "disqualify" the candidate. Choose a reason (selecting "Other" will provide a list of more reasons to choose from.)
    - Middlebury has requirements for reporting on our recruitment and hiring decisions, therefore it is very important that you disqualify candidates in the system. Please do so thoughtfully and by using the preapproved reasons if possible.

Stages of the Candidate Pipeline

Sourced: These are candidates that have been identified via Workable or HR as being potential matches for the open position. These candidates have not applied for the position. When reaching out to sourced candidates please use one of the standard templates (Contact Sourced Position).

Applied: These are the candidates that have actually applied for the position you posted. Candidates that meet the minimum qualifications of the job should be moved from this bucket into the Phone Screen bucket.

Meets Minimum Qualifications: Candidates who meet the minimum qualifications (required education/licensure, and experience) as stated in the position description are moved to this stage. Note: this stage does not necessarily mean the candidate has the desired additional qualifications listed in the job description.

Phone Screen: A phone screen is a quick standardized phone call with the candidate to ensure that they understand the position and would be qualified for the role before moving to a more formal interview. Consistency is important so please think through your questions prior to calling and record your answers.

Assessments: Work with your HR Business Partner to develop consistent assessments for the position so that you can fairly and accurately grade your candidates. Assessments will not be applicable to all positions and are an optional part of the candidate pipeline: More from Workable on Assessments.

Interview Stages: Depending on the type of position and the department interviewing there may be many different types of interviews conducted. Work with your HR Business Partner to make sure that your pipeline matches your practice when it comes to interviews. You and your search committee members can comment on candidates.

Compensation Review: Candidates should be placed in this bucket when they have been identified as a finalist for the position. Your HR Business Partner will reach out to you (or you can @tag your HR Business Partner) to start the discussion on Skills Matrix Placement for the candidate.

Offer Approved/Offer Accepted: These buckets are for candidates that you have been approved to make an offer on. Once a candidate accepts an offer please move them to Offer Accepted. Disqualify all remaining candidates.

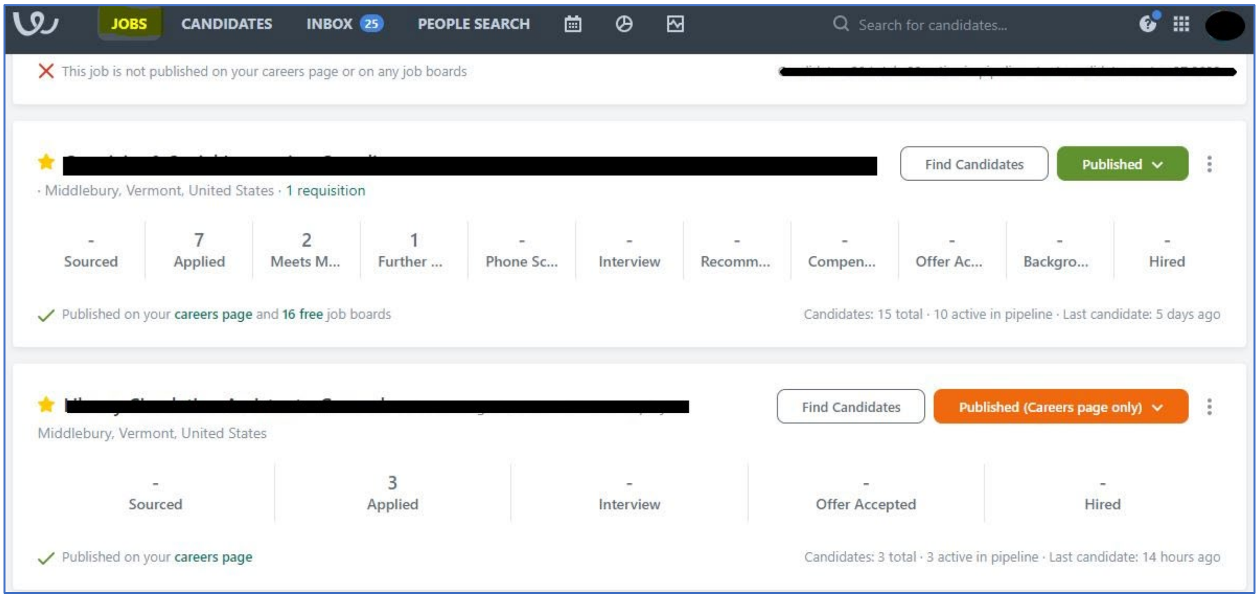
Student Hired: This bucket is for student employee(s) that you have hired. Disqualify any students you do not wish to hire.

Background Check: Workable integrates directly with Checkr our new background check provider. Please indicate whether the position requires any additional checks (Motor Vehicle Records check, Employee Credit Check, Education Verification Check).

Hired: HR will move the candidate to Hired once a salary and start date has been confirmed. You may also be asked to confirm whether this is a driving position, whether the position will be remote/hybrid/on campus, the manager for the position or position code, if you have not already done so. Once set to the hired status the candidate information will be uploaded to Oracle

How to Hire Staff/Student Employees

- Log in to Workable
- Click on “Jobs” from the top toolbar
- You will see a list of positions that are posted along with the associated candidate pipeline.



This job is not published on your careers page or on any job boards [redacted]

[redacted]

· Middlebury, Vermont, United States · 1 requisition

Sourced	Applied	Meets M...	Further ...	Phone Sc...	Interview	Recomm...	Compen...	Offer Ac...	Backgro...	Hired
-	7	2	1	-	-	-	-	-	-	-

Published on your careers page and 16 free job boards

Candidates: 15 total · 10 active in pipeline · Last candidate: 5 days ago

[redacted]

Middlebury, Vermont, United States

Sourced	Applied	Interview	Offer Accepted	Hired
-	3	-	-	-

Published on your careers page

Candidates: 3 total · 3 active in pipeline · Last candidate: 14 hours ago

Job Statuses

- **Published:** This means the position is published on the Middlebury Career page and free job boards that are integrated with Workable (e.g. Indeed, Glassdoor, etc.)
- **Published (Careers Page Only):** This means the position is only published on the Middlebury Career Page. This is commonly used for student employee jobs.
- **Used Internally:** This means the position is active but not published on the Middlebury Career page or any other job boards. This is most often used when a candidate is in the final stages of the hiring process and /or the hiring leader does not wish to receive additional applications. This is also used for “private” postings for student employment jobs.
    - See the Referring Candidates section of this document to find instructions for student employees/internal staff to apply to internal postings.

Search Committee Members

- Search committee members can be added to positions by your HR Business Partner or the Recruiting Coordinator.
- Search committee members are added as “reviewers” (with limited access) to jobs.
- In the candidate profile navigation bar, use the thumbs up/thumps down button to provide a quick assessment of the candidate. This can be used to get a pulse from search committee members regarding who should move forward in the interview process.

View Applicants (Staff & Student)

- Click on the name of the position to view applicants.

    - Alternatively: if you wish to only see the applicants in a specific stage of the pipeline, click on the number in that stage. (In the image above, if I wished to see the 2 individuals who are in the Meets Minimum Qualifications stage, I would click on the number 2 above the stage name.)

Move Applicants Through the Pipeline (hiring process)

- Use the green button in the top right of the candidate profile to move an applicant to the next stage in the pipeline.
- To skip a stage, use the arrow on the right side of that button to select the appropriate stage.

Disqualify Applicants

- When an applicant is no longer under consideration or when a hire is made, use the red hand to "disqualify" the candidate(s).
    - Choose a reason (selecting "Other" will provide a list of more reasons to choose from.)
- It is important for reporting purposes that we move candidates through the pipeline as they proceed and that we disqualify candidates (and provide a reason for disqualification).
- Each stage of the pipeline will present you with different disqualification reasons.
- Applicants that have been disqualified from a job will continue to be visible and can be reverted to active candidates at a later date.
- When a staff/adjunct candidate is moved to "disqualified" they will receive an auto-generated email:

> *Thank you for your interest in employment at Middlebury and for applying to the XX position. We have completed our initial evaluation of candidates for this position and have decided not to pursue your candidacy at this time. We encourage you to review other employment opportunities with Middlebury.*

- When a student is moved to "disqualified" they will receive an auto-generated email:

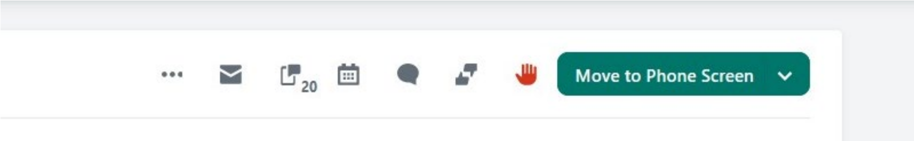
> *Thank you for your interest in the XX student employment opening. The hiring department has filled this position at this time. We encourage you to review other student employment opportunities.*

Bulk Actions –disqualify, email, or move to a stage in the pipeline for multiple candidates/students

Use bulk actions to disqualify multiple candidates at the same time *for the same reason*.

1. Click on the name of the job.
2. On the left-hand side of the screen there will be a list of the applicants. Click on the check box next to all applicants you wish to disqualify.
3. Click on the "bulk actions" drop-down menu above the list of applicants, click disqualify candidates.
4. Choose a reason and then click "disqualify candidates" (or "cancel & return" if you do not wish to proceed).

Use the Navigation Bar in the Candidate Profile



Comments:

- Workable was modeled in part on social media and as such it uses @tags to notify users in the system of a comment directed to them.
- Click the icon that looks like a speech bubble to add comments within the candidate profile.
- You can @tag a member of HR or your search committee members if you want them to receive an email notification (and an in-app notification).
- You and your search committee can communicate about the candidate and this information will be saved into the candidate profile timeline.
- **Applicants are not able to see comments that are made.**

Email Applicants and Use Templates:

- Click the envelope icon to email a candidate directly.
- Click on the Templates drop-down menu to see available email templates for communicating with Candidates.
  - Note: All of the templates from PeopleAdmin have been copied over to Workable with the same titles.
- Workable has the additional functionality of being able to build templates for specific departments or jobs. Please work with HR Business Partner to develop appropriate templates for your area.

Texting Applicants:

- Click the texting icon (“conversations”) to send a text message to applicants.
- Text message communications are retained within the candidate profile.
- Texting guidelines: As with any communication with applicants, please use appropriate language and judgment. Please use the email feature for lengthy conversations.

Scheduling Interviews with Applicants

- Workable is directly integrated with our Office365 calendars.
- Click the calendar icon to schedule an interview directly into your calendar via Workable.
- Use a “Self Schedule Link” to allow candidates to schedule time directly with you (update your preferences in your user menu settings to indicate available days and times for self-scheduling). More from Workable on Scheduling.

Make an Offer – Staff/Adjunct Faculty

1. Move the candidate to the “Compensation Review” stage in the Pipeline.
2. Scroll to the Hiring Details section at the bottom of the candidate profile.
   a. Enter grade
   b. Enter skill matrix assessment
3. Add a comment to the candidate profile and tag (using the @ symbol) your HR Business Partner.

4. The HR Business Partner or Compensation Specialist will add an approved hiring range to the Hiring Details section of the candidate profile.
5. Make offer to candidate.
6. If candidate accepts the offer, move the candidate to the “Offer Accepted” stage in the pipeline.
7. Scroll to the Hiring Details section of the candidate profile and complete the following:
    a. Requested start date
    b. Department
    c. Final Offer Accepted
    d. Position Title
    e. Who will approve the time card
    f. Work location
    g. Weekly working hours
    h. Is this a driving position
    i. Will the position need IT equipment (note: this does **not** send a notice to IT to order equipment)
    j. If working from home, is the individual working from a state other than their department location
    k. If term appointment, start and end dates of the assignment.
8. Add a comment to the candidate profile and tag (using the @ symbol) your HR Business Partner to notify them that the hiring details are complete.
9. The HR Business Partner will complete the remaining steps in the hiring process for the candidate that you are hiring.
    a. Don’t forget to disqualify other candidates who are still active in the pipeline.

Make an Offer – Student Employee

- Move the student to the “Student Hired” stage in the pipeline.
- Scroll to the Hiring Details section of the candidate profile and complete the following:
    - Requested start date
    - Who will approve the time card
    - Work location
    - Weekly working hours
- Add a comment to the candidate profile and tag (using the @ symbol) your HR Business Partner to notify them that the hiring details are complete.
- The HR Business Partner will complete the remaining steps in the hiring process for the candidate that you are hiring.

Other Workable Features:

Referring Candidates (used for both general referrals and Internal-Only Student/Staff postings):

- To refer a staff/student to an internal only position, send them an email and ask them to apply by following these instructions:
    1. Log into Workable
    2. Click on the square next to your name (or photo) and click “Workable Referrals”
    3. Click on all departments on the top right to filter. This is helpful to filter to the student employment postings.

    4. Find the posting you wish to apply to and click “apply.”
    5. Complete your application.

- If you know someone who you think would be a good fit for a position at Middlebury, feel free to refer them, you can do so directly via email or social media via our Referrals website or new Careers page.

Appointment Letters:

1. Appointment letters templates are built into Workable and tied to specific locations, departments or jobs. HR manages the Appointment Letter templates but please let us know if there are specific requirements.

Finding Position Descriptions:

2. Workable is not a position management solution and does not house Job Descriptions. HR is developing solutions for storing and displaying our position descriptions but in the meantime all positions can be found in the position description library.
3. Ask your HR Business Partner if you want an editable word document version of a position description.