HIRE. RETAIN. BETTER.

The Ultimate Reference Check Template

CROSSCHQ

Planning is key to quality reference check feedback

Like most desired business outcomes, teams don't achieve success without proper preparation and strategy. Recruiters need to hire quickly, and with confidence, with the ultimate goal of continuously improving Quality of Hire (Quality of Hire represents longer than average retention and better than average performance).

Reference checking is an invaluable step in the hiring process when done well, but can be a waste of time when done poorly. As such, it requires careful planning. Before a reference check is conducted, the entire hiring team needs to be aligned on the ultimate goal and how to get there.

Getting honest, actionable feedback from references can be tricky for several reasons, including the fact that most references are handpicked by the candidate because they know their reference will give them a glowing review. To get useful information on a candidate in a meaningful way, and elicit useful feedback directly from references, a hiring team needs to deeply understand the culture and team dynamic first, so they can focus on mining for those skills and competencies that will lead to success with the new hire.

Start with these internal questions

- **What is the company culture?**
  What type of personality and skill set will best fit and thrive in the organization, department and team?

- **What are the top reasons for voluntary churn?**
  Is there anything to learn from previous employees leaving the company, or in this department or under this hiring manager?

- **What type of manager will the new hire report to?**
  What is the manager's working style and what attributes in a new hire will best lead to good communication and productive workflows?

- **What skills & competencies are most important for this role?**
  Review goals, workload, working styles, team dynamics, and any other relevant pieces of the puzzle.

- **What soft skills are required for this role?**
  What personal skills will lead to successful interactions with the manager and colleagues?

Tips for conducting meaningful reference checks

Frame the reference call as a chance to help set up the candidate for success in their potential new role. It's paramount a recruiter and hiring manager be aligned, understanding the environment and culture so they can ensure the new hire will have the personality, skills and competencies to thrive in the organization, not just that the candidate has the technical requirements of the job.

Strategize together what questions need to be asked about a candidate to ensure a higher Quality of Hire. You can get actionable insights and meaningful candidate intelligence from a reference by consistently asking the right questions that get to the heart of the needs of a role.

Follow these tips and use Crosschq's reference survey template to get the most out of your reference checks

- **Conduct a thorough and consistent reference survey** versus having an open-ended conversation about the candidate. Surveys keep the reference call concise and efficient, focusing on the specific questions that need to be answered.

- **For each role, give all references the same survey,** without fail. This will decrease the risk of unconscious bias and make it easier to consolidate feedback and compare results.

- **Don't try to personally interpret qualitative feedback.** Transcribe responses to open questions, if any, verbatim if possible. Don't guess what a reference's tone implies, or what a pause before an answer infers. Your own bias could easily skew results.

- **Recruiters and hiring managers work together to build the reference questions.** Recruiters will know what technical skills are required and have a good handle on company culture, while the hiring manager will understand the team's dynamic, the role's responsibilities and their own managing style..

- **Check references earlier in the process.** Don't wait until after interviews to check the box of a quick reference check. When the right questions are asked, you can gather information that could help form earlier opinions on the candidate's chance for success.

Don't fall prey to messy notes.

Use our template for a more fair, organized reference checking process.
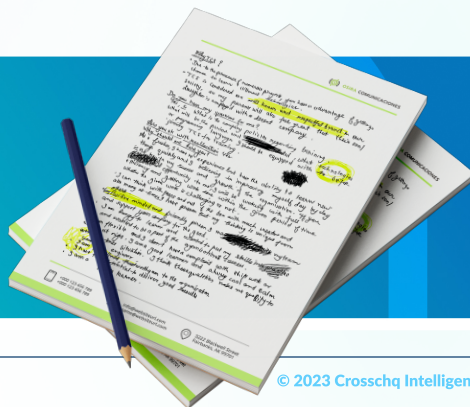
Reference Checking Template

Candidate Name:

Job Title:

Department:

Hiring Manager:

Recruiter/ HR Team Member: *(Person conducting the reference check)*

TABLE STAKES REFERENCE QUESTIONS	REF. 1	REF. 2	REF. 3	REF. 4	REF. 5	AVG
Describe the role, then ask... On a 1-5 scale, do you think the candidate would be a fit for the role?						
On a 1-5 scale, would you say the candidate is an ethical person?						

ON A 1-5 SCALE PLEASE RATE THE CANDIDATE'S ATTRIBUTES AND BEHAVIORS.						1 LOW - 5 BEST
EMPLOYEE ATTRIBUTES	REF. 1	REF. 2	REF. 3	REF. 4	REF. 5	AVG
Enjoyable to work with						
Optimism						
Handles stress well						
Willingness to go above and beyond						
Attention to detail						
Adaptability or Add your own						
Creative thinking or Add your own						

ON A 1-5 SCALE PLEASE RATE THE CANDIDATE'S SOFT SKILLS.						1 LOW - 5 BEST
SOFT SKILLS	REF. 1	REF. 2	REF. 3	REF. 4	REF. 5	AVG
Project management						
Presentation skills						
Written communication skills						
Lead cross-functional team						
Working within a team						
Conflict managment or Add your own						
Process development or Add your own						

ON A 1-5 SCALE PLEASE RATE THE CANDIDATE'S TEAM SKILLS.						1 LOW - 5 BEST
TEAM MEMBER ATTRIBUTES	REF. 1	REF. 2	REF. 3	REF. 4	REF. 5	AVG
Work effectively with little direction						
Self-starter						
Takes feedback well						
Provides feedback in a positive way						
Listening to others						
Delegating or Add your own						
Time management or Add your own						

Reference Checking Template

Candidate Name:

Job Title:

Department:

Hiring Manager:

Recruiter/ HR Team Member: *(Person conducting the reference check)*

ON A 1-5 SCALE PLEASE RATE THE CANDIDATE'S ROLE SPECIFIC SKILL.						1 LOW - 5 BEST
JOB SKILLS	REF. 1	REF. 2	REF. 3	REF. 4	REF. 5	AVG
Ability to create a product story SAMPLE QUESTION FOR A PRODUCT MARKETER						
Consistent quota attainment SAMPLE QUESTION FOR A SALES REP						
High customer satisfaction score SAMPLE QUESTION FOR A CUSTOMER SUCCESS MANAGER						
Job site safety record SAMPLE QUESTION FOR A CONSTRUCTION MANAGER						
Experience with Java SAMPLE QUESTION FOR A SOFTWARE DEVELOPER						
Ability to tie KPIs to business outcomes SAMPLE QUESTION FOR A DATA ANALYST						
Consistent delivery of quality candidates SAMPLE QUESTION FOR A RECRUITER						

IN 3 WORDS OR SHORT PHRASES, PLEASE DESCRIBE THE CANDIDATE'S GREATEST STRENGTHS.						
STRENGTHS (QUALITATIVE)	REF. 1	REF. 2	REF. 3	REF. 4	REF. 5	AVG
Strength 1						
Strength 2						
Strength 3						

IN 3 WORDS OR SHORT PHRASES, PLEASE DESCRIBE THE CANDIDATE'S AREAS FOR IMPROVEMENT.						
TEAM MEMBER ATTRIBUTES	REF. 1	REF. 2	REF. 3	REF. 4	REF. 5	AVG
Needs improvement 1						
Needs improvement 2						
Needs improvement 3						

ANY ADDITIONAL FEEDBACK YOU WANT TO SHARE? (ONLY OPEN ENDED QUESTION)						
ADDITIONAL FEEDBACK	REF. 1	REF. 2	REF. 3	REF. 4	REF. 5	AVG
Qualitative feedback						

Automate your reference checks with Crosschq

With Crosschq's cloud-based, automated reference checking solution you can gather candidate insights faster while ensuring a perfect skills, competency and culture match with every new hire.

- Get access to quickstart libraries of role and title specific surveys
- Share detailed reports with comprehensive, data-driven candidate insights
- Build new talent sources from candidates' references.
- Integrate easily with ATS and HRIS partners

Integrations and Partnerships

icims

greenhouse

workday.

slack

bambooHR®

SAP SuccessFactors

LEVER

Bullhorn

JazzHR

goodtime

SmartRecruiters

JOBVITE

*"Crosschq provides real data, quickly enabling **more informed decision making.**"*

Yoni Lateiner
RECRUITING LEAD, NERDWALLET

High Performer
Enterprise
SPRING 2023

Fastest Implementation
SPRING 2023

Leader
SPRING 2023

Best Est. ROI
SPRING 2023

Easiest Setup
SPRING 2023

Deliver a Great Candidate Experience

#1 Reference Checking Solution

Ensure skills, competency and culture match with every new hire by getting comprehensive 360 candidate insights.

95% Faster than Traditional Checks

Save valuable time and money freeing your recruiters and hiring managers up to do other important tasks.

Create New Candidate Pools

Quickly build new diverse talent sources from your candidates' references.

✕ CROSSCHQ

From outdated, manual reference check notes to data-rich, digital reference reports in minutes

✕ CROSSCHQ 360
Automated, Digital Pre-hire Data Solution

Traditional Reference Checks

	✕ CROSSCHQ 360	Traditional Reference Checks
TIME TO CONDUCT	Minutes in app — 95% FASTER THAN TRADITIONAL CHECKS	3++ hours on phone
TIME TO COMPLETE	Reduce Time to Hire and complete check in just 2 business days	8-10 business days, or more
CANDIDATE DATA	Insightful data and reports with skills and competencies ratings	None. Notes not integrated or shared
AVERAGE COST	$4 - $8 per candidate	$144 per candidate
LEVEL OF INSIGHTS	Holistic view with detailed, 360 feedback	From basic to none due to guarded yes/no answers
LEVEL OF BIAS	Mitigate bias with preset questions and scoring	Significant risk of unconscious bias
IMPACT ON DIVERSITY	Increase diversity hiring by 32%	Negative impact on diversity
CANDIDATE EXPERIENCE	Candidate friendly, easy to use	No visibility into progress, adds longer wait time
ADDITIONAL USES	Conduct smarter interviews, onboard new hires better and 2x faster	No organized, applicable takeaways

Reference Checks Reimagined

Crosschq 360 is the fastest, candidate-friendly way to gather verified 360 pre-hire insights.

- 95% faster than traditional checks
- Get comprehensive candidate reports
- Takes minutes to start a check
- Build new talent pools automatically
- 100% digital, secure and compliant

SCHEDULE A DEMO

Get a customized demo from a team expert today.

Key Attributes	Self	References
Handles stress well	4.0	4.0
Communication skills	3.0	4.0
Consistent delivery of quality work	4.0	3.5
Optimism	4.0	5.0
Willingness to go above and beyond	4.0	4.0
Attention to detail	4.0	4.5
Takes feedback well	3.0	3.0
Enjoyable to work with	5.0	

Key Skills and Areas for Improvement

SKILLS MASTERED
Coachability	3 out of 5 references
Conflict management	2 out of 5 references
Project management	2 out of 5 references
Working within a team	3 out of 5 references

Projected QoH 86 — Candidate B

Recommendation for Rehire	100%
Reference Rating	4.2
Culture Fit	4.5
Quota Attainment	TOP 5%
Leadership Style	DEMOCRATIC