

Candidate Interview & Evaluation

By Checklist

☐ Prepare the interview

Prepare the role-specific criteria and questions before interviewing. Use one agreed revision for candidates in the same interview round. Change the reusable template before starting a run; keep real candidate information out of the template.

☐ Record the role's success criteria

Write the essential job outcomes, capabilities and expected level for this role. Separate must-have requirements from skills that can be learned after joining. Use observable job-related criteria, not personality, similarity to the team or personal background.

☐ Record the questions and scoring anchors

Confirm the core questions and describe what evidence would meet the expected level for each competency. Use the same questions and anchors across this interview round. Starter scale: 1 = relevant evidence falls below the role requirement; 2 = partly meets it with specific gaps; 3 = meets it; 4 = exceeds it with clear examples. Choose Not enough information when the question was not assessed or the evidence cannot support a rating. Missing evidence is not a score of 1.

☐ Identify the criteria and question-set revision

Record the version or approval date so evaluations can be traced to the same criteria. If the criteria change during a hiring round, agree with the hiring lead how earlier candidates will be assessed consistently.

☐ Review the candidate's application

Review the CV, application and relevant work samples. Note any job-related points that need clarification.

☐ Prepare relevant follow-up questions

Follow-ups may clarify a candidate's answer, but should remain relevant to the role and the competency being assessed.

☐ Align the interview panel

Agree who asks each question and how to cover the role criteria. Each interviewer records an independent evaluation before reading others' assessments. For a solo interview, confirm your own coverage plan.

☐ Record interview details

Use a fresh run for each candidate, role and interviewer. Keep only the information needed for this evaluation and store it through the organization's approved hiring process.

☐ Candidate name or application reference

Use the minimum identifier needed to match the approved application record. Do not paste the candidate's full application or sensitive personal information here.

☐ Role

☐ Interview date

☐ Interviewer

Record the evaluator responsible for this assessment. Panel members should use separate runs for independent evaluations.

☐ Run the structured interview

Ask the agreed core questions, then relevant follow-ups about the situation, the candidate's own action and the result. Keep assessments limited to the role criteria. Each evidence field needs either specific examples or an explanation of what is missing; do not invent evidence to complete the form.

☐ Role understanding

Question: What attracted you to this role, and what do you think success in it looks like?

Assess understanding of the actual responsibilities and expected outcomes. Do not rate enthusiasm, confidence, personal similarity or interview polish as a substitute for job-related evidence.

☐ Record evidence or explain the gap

Record the situation, the candidate's own actions and the result, then relate them to the agreed criterion. Separate what the candidate reported from what was independently verified. If the question was not covered or the answer is insufficient, state what is missing and what follow-up would resolve it.

☐ Score role understanding

Apply the agreed role-specific anchors to the evidence above. Use Not enough information if this competency was not assessed or the evidence cannot support a rating; missing evidence must not become a low score.

☐ **Job-specific capability**

****Starter question:**** Tell me about the work or experience that best demonstrates your ability to handle the core responsibilities of this role. What did you personally do, and what was the result?

Before interviewing, rename or duplicate this group for each essential capability and replace the starter question. Examples to adapt: a support role handling an escalated customer issue; an analyst checking a data-quality problem; an operations role resolving a delivery failure. Keep the same questions and criteria for the same interview round.

☐ **Record evidence or explain the gap**

Record the situation, the candidate's own actions and the result, then relate them to the agreed criterion. Separate what the candidate reported from what was independently verified. If the question was not covered or the answer is insufficient, state what is missing and what follow-up would resolve it.

☐ **Score job-specific capability**

Apply the agreed role-specific anchors to the evidence above. Use Not enough information if this competency was not assessed or the evidence cannot support a rating; missing evidence must not become a low score.

☐ **Problem solving & judgment**

****Question:**** Tell me about a difficult problem you had to solve. What was the situation, what options did you consider, what did you do, and what happened?

☐ **Record evidence or explain the gap**

Record the situation, the candidate's own actions and the result, then relate them to the agreed criterion. Separate what the candidate reported from what was independently verified. If the question was not covered or the answer is insufficient, state what is missing and what follow-up would resolve it.

☐ **Score problem solving & judgment**

Apply the agreed role-specific anchors to the evidence above. Use Not enough information if this competency was not assessed or the evidence cannot support a rating; missing evidence must not become a low score.

☐ **Collaboration & communication**

****Question:**** Tell me about a time you had to work with someone whose priorities or approach differed from yours. How did you handle it?

☐ **Record evidence or explain the gap**

Record the situation, the candidate's own actions and the result, then relate them to the agreed criterion. Separate what the candidate reported from what was independently verified. If the question was not covered or the answer is insufficient, state what is missing and what follow-up would resolve it.

☐ **Score collaboration & communication**

Apply the agreed role-specific anchors to the evidence above. Use Not enough information if this competency was not assessed or the evidence cannot support a rating; missing evidence must not become a low score.

☐ **Learning & adaptability**

****Question:**** Tell me about a time you had to learn something important quickly or adapt to a significant change. What did you do?

☐ **Record evidence or explain the gap**

Record the situation, the candidate's own actions and the result, then relate them to the agreed criterion. Separate what the candidate reported from what was independently verified. If the question was not covered or the answer is insufficient, state what is missing and what follow-up would resolve it.

☐ **Score learning & adaptability**

Apply the agreed role-specific anchors to the evidence above. Use Not enough information if this competency was not assessed or the evidence cannot support a rating; missing evidence must not become a low score.

☐ **Candidate questions**

Leave enough time for the candidate to understand the role, team and organisation.

☐ **Invite the candidate to ask questions**

Give the candidate time to ask about the role, team, organisation, expectations or hiring process.

☐ **Record candidate questions or concerns**

Record job or process questions that need an answer. Avoid recording unrelated personal details or sensitive disclosures; route necessary support requests through the approved HR process.

☐ **Explain the next step**

Explain the next assessment or decision stage and the expected update date agreed with the hiring lead. Do not promise an offer or outcome you are not authorized to confirm.

☐ **Complete the evaluation**

Record your own evidence, ratings and rationale before the hiring discussion. This form captures an interviewer's job-related assessment; it does not calculate a hiring decision, reject a candidate or send a message.

☐ **Record key strengths**

Identify the strongest evidence and the role criterion it supports. Avoid unsupported descriptions such as 'great fit'.

☐ **Record concerns or evidence gaps**

Record unresolved questions and specific role-related gaps. Distinguish evidence of a capability gap from a question that was not assessed.

☐ **Record overall recommendation**

Record your human recommendation against the documented role criteria. Choose Not enough information when key evidence is missing. A recommendation is input to the authorized hiring decision, not a decision made by this checklist.

☐ **Explain the recommendation**

Explain how the evidence supports your recommendation, referring to the role criteria. If there is not enough information, identify the unanswered criterion and the next assessment needed. Do not use a score total as an automatic pass/fail threshold.

☐ **Record follow-up or verification needed**

List each unresolved criterion and the proportionate follow-up needed, such as an approved work sample or clarification. Record an owner and target date for each action using the task controls or an approved hiring-system reference. Follow the organization's consent and verification process.

☐ **Complete your evaluation before the hiring discussion**

Record your evidence, scores and recommendation before reviewing other interviewers' opinions.

☐ **Choose the next step**

Record the next step agreed with the authorized hiring lead. Select Further assessment or Hold while material evidence is unresolved. This selection does not send a candidate message or authorize an offer or rejection.

☐ **Complete the agreed follow-up checks**

If follow-up is needed, duplicate this task for each check and assign its owner and due date. Record the result in the approved hiring record and reassess the affected criterion before closing the action. If no follow-up is needed, note that and close the task.

☐ **Send the agreed candidate update**

Assign the approved hiring contact and promised update date. Send only the outcome or status authorized by the hiring lead through the organization's normal channel, then record the send date or communication reference. Do not mark complete just because an update has been planned.