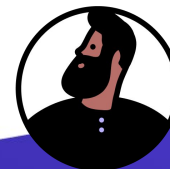


ContactOut 



# Mastering Intake Meetings & Job Intake Forms

The Definitive Guide



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We plan to update this resource regularly. Share your feedback or suggestion [here!](#)

# Introduction



## What's this all about?

Ever found yourself nodding in an intake meeting, secretly lost? We've all had those "Wait, what?" moments. This guide's goal is to make those times a thing of the past — we'll get into mastering intake meetings and designing effective Job Intake Forms.



## What will you learn at the end of this guide?

- A clear understanding of what an intake meeting really is and why it's a game-changer in recruitment.
- The know-how to design a Job Intake Form that genuinely works.



## Why's this a big deal?

Time's precious, especially in the recruitment world. Misunderstandings? They eat that time up.

Nail your intake meetings, and you've just cleared the path for a smoother, faster recruitment journey. It's about creating that harmony between you and hiring managers.



## 1. Understanding the Intake Meeting

### The Heartbeat:

This meeting is the pulse check. It's where visions align, expectations are set, and the candidate persona is envisioned. Yeah, it's a biggie.

#### Real-World Scenario

Think of a startup scouting for a software engineer. The recruiter might be thinking of looking for a tech-savvy all-rounder, but the hiring manager might dream of a Python pro. This meet-up? It's the bridge between those two visions and gets everyone on the same page.

## 2. The Intake Meeting Prep Work

### Your Homework:

Coming in cold? That's a no-go. Arm yourself with data, insights, and some smart questions.

- Research on: salary benchmarks, skills, qualifications, and previous hire sources.
- Set a timeframe considering yield ratios, time-to-hire, and time-to-fill and adjust accordingly.

#### Real-World Scenario

Say you're prepping for a "Content Strategist" meeting. Dive into the company's past hires, local salary stats, trending skills, and peek into competitor hires. You might find, for example, that local industry standards demand a salary higher than the initial budget, or that most content strategists in the area specialize in video content. That's great, you want to bring that information into the meeting to discuss.



## 3. Conducting the Intake Meeting

### The Playbook:

Like we mentioned before, the intake meeting is your chance to understand who the main stakeholders are, what the deal breakers are, salary range, assessment methods, career path, and so on.

- **DO:** Ask pointed questions that will help you shape the profile of the candidate.
- **DON'T:** Ask vague questions

#### Real-World Scenario

Let's imagine you're in deep discussion about a "Product Manager" role. Instead of a broad "What do they do?", zoom in with,

- "How does this role weave into our 5-year plan?" or,
- "Which teams will they work closest with?"

These questions can help narrow down whether the company needs someone with a software background, a physical product background, or perhaps someone with extensive user experience understanding.

#### Real-World Scenario

For a "Graphic Designer" role, a vague answer for the required skills would be "Experience with design software." That's ambiguous. Instead, you should look for something specific like:

- "Experience with Adobe Creative Suite, especially Illustrator and Photoshop."

## 4. Post-Meeting Actions

### The Heartbeat:

You might end up with a long list of skills and requirements. It's good to help the hiring manager differentiate between the must-haves and the nice-to-haves.

Turn those meeting insights into an irresistible job ad. But remember, two eyes are better than one. Get that hiring manager to greenlight it.

Set up regular cadences with them to create an efficient and agile recruitment process.

# Questions to ask during the intake meeting:

- 1 What primary duties will the person in this position undertake?
  - 2 How would you describe the purpose of this role within the organization?
  - 3 How does this position fit into and interact with other business segments?
  - 4 Can you detail the current team composition and who this role will directly answer to?
  - 5 Will there be any team members reporting directly to this new position?
  - 6 What critical milestones would you expect the individual to achieve within their initial 3 to 4 months?
  - 7 What are the essential qualifications and credentials you're looking for in potential candidates?
  - 8 Are there any preferred skills or experiences that would be beneficial for this role?
  - 9 Why might specific industry experience be beneficial, or can it be overlooked?
- 10 Which software expertise is crucial for this role?
  - 11 What are the absolute non-negotiables when considering candidates?
  - 12 Could you provide an estimate on the salary range for this role?
  - 13 Aside from the standard benefits, are there any unique perks or bonuses tied to this position?
  - 14 What does a typical work week look like for this role?
  - 15 Is there an ideal start date in mind for the new member?
  - 16 How will candidates be evaluated during the selection process? Will there be any task or project-based assessments?
  - 17 What future job opportunities might come from this position?
  - 18 How would you define your department's contribution to the broader company mission?
  - 19 Are there any additional advantages or perks unique to this role, aside from the general employee package?

### Real-World Scenario

You've wrapped a meeting for an "HR Specialist" role. You realize that while a certification is nice, it's actually more important for the candidate to have a hands-on track record with diversity initiatives.

That'll be your star highlight in the job ad, setting the tone for what you're really after.



## 5. Crafting the Job Intake Form

### The Blueprint:

This isn't another form; it's THE form. It's the backbone of your recruitment process, which you would refer back to at multiple points of the recruitment process.

You can bring this form with you into the intake meeting, or send it straight to your hiring manager to fill out asynchronously.

Now, let's walk through how to create an intake form. We'll go through 2 templates (spoiler: the second one is one that we use ourselves!).

# Template 1 — By Madeleine Nguyen

1

## Starting with the basics

The job title, hiring manager, a quick overview of the role and who the role reports to.

### Intake Form

**JOB TITLE:**

**HIRING MANAGER:**

**Role Overview:** This is a [Name of Role] role that requires [a deep understanding of our product, and ability to design solutions that allow our clients to meet their business objectives.]

**Current Team:** This role reports to....

**Target Candidate:** Remember to also explore diverse channels and backgrounds! The ideal candidate looks like:

- Seniority: [2+ years of experience in a closing role (esp. in B2B tech sales)]
- Hard skills: [Managing and growing a sales pipeline, strategic prospecting into key accounts and verticals]
- Soft skills: [Strong relationship building skills, empathy]
- Pedigree: [MBA from top business school preferred]
- Specific kinds of industry experience: [Startups, B2B, SaaS sales experience]
- Compensation range: [discuss compensation range with hiring managers and leadership at your company]

Sample ideal candidate profiles:

- Link to profiles from LinkedIn

**Sourcing Strategy:**

- Target candidates from [top SaaS companies like: Atlassian, Figma, GitLab, Expensify, Copper, Zoom, HubSpot]
- Specific keywords on LinkedIn/resumes: [SaaS, B2B, tech sales, Account Executive, Strategic Account, Biz Dev, Analyst]
- Titles on LinkedIn/resumes: [Account Executive, Mid Market Account Executive, Sr Account Executive]
- What industry-specific job sites would be good to post on:

2

## 5W1H

When in doubt, think back to the 5W1H — What, Where, Who, When, Why, How.

Next could be what the target candidate looks like.

In an ideal world, what kind of person would the candidate be?

You could also find and include sample profiles on LinkedIn to get clear on the exact kind of candidate you're looking for.

# Template 1 – By Madeleine Nguyen

3

## Sourcing Strategy

Talk a little bit about the sourcing strategy you're planning to use. What kind of companies should they have worked at?

Any specific keywords to look out for? Where are you going to source them from?

### Sourcing Strategy:

- Target candidates from [top SaaS companies like: Atlassian, Figma, GitLab, Expensify, Copper, Zoom, HubSpot]
- Specific keywords on LinkedIn/resumes: [SaaS, B2B, tech sales, Account Executive, Strategic Account, Biz Dev, Analyst]
- Titles on LinkedIn/resumes: [Account Executive, Mid Market Account Executive, Sr Account Executive]
- What industry-specific job sites would be good to post on:
  - Glassdoor
  - SimplyHired
  - CareerBuilder
  - Indeed
  - ZipRecruiter
  - Adzuna
  - JuJu
  - Startuper
  - AngelList

## Expectations

- Target close / hire date:
- Confirm budget for role: \$\$
- **Standard process:**
  - Pipeline & calibration
  - Recruiter screen (30m)
  - Phone interview with hiring manager (30m) - what will be covered?
  - Exercise: give an account to the candidate and ask for a plan: Who would they target, What would the messaging be for the outbound? How would they manage outreach?
  - Pre-brief

4

## Expectations

Next, another big one: setting expectations. When should the hire be closed and onboarded? What is the set budget for this role?

Also talk through any other processes that you already have in place.



# Template 1 — By Madeleine Nguyen

5

## Next Steps

And last but not least, next steps and action items. Get clear on this together with the hiring manager so you can jump right into it after your meeting.

### Expectations

- Target close / hire date:
- Confirm budget for role: \$\$
- **Standard process:**
  - Pipeline & calibration
  - Recruiter screen (30m)
  - Phone interview with hiring manager (30m) - what will be covered?
  - Exercise: give an account to the candidate and ask for a plan: Who would they target, What would the messaging be for the outbound? How would they manage outreach?
  - Pre-brief
  - Onsite interview: 4 hours
  - Debrief with team
  - Offer
  - Reference checks
  - Handoff

### Next steps and action items

- Calibration: recruiter will gather 10 profiles or resumes within 1 week to share for feedback
- Recruiter will provide 7 top applicants for hiring manager to screen for interview invites within 2 weeks
- All notes will be maintained on applicant profiles in Lever

# Template 2 — ContactOut's Intake Form

1

## Starting with the basics

As we mentioned above, this is one that we personally use at ContactOut!

Starting off strong once again with the basics: hiring status, seniority level, target fill date, monthly budget and timezone requirements (especially useful if you're hiring remotely).

2

## What's the problem to solve?

A useful question to ask is: "What gaps in the business are they meant to solve?". This will help you and the hiring manager understand how the role relates to the business' short and long term goals.

3

## Day-to-day role

Next up, some details on their day-to-day. This is especially useful for helping you and the candidate visualize what it would like to take on the role.

Questions	Role title:
Hiring status	<input type="checkbox"/> New role <input type="checkbox"/> Backfill for: <input type="checkbox"/> Limited or part-time engagement <input type="checkbox"/> Other:
Level (subject to further probing)	<input type="checkbox"/> Junior level: 0-3 years' experience is necessary. Extensive training and guidance will be provided <input type="checkbox"/> Mid-level: 3-5 years' experience is necessary. Some form of training and guidance will be provided. <input type="checkbox"/> Senior-level: 5-8 ++ years' experience is necessary. Minimal form of training and guidance is provided. <input type="checkbox"/> Other:
Target fill date	<input type="checkbox"/> Immediately <input type="checkbox"/> Within the month <input type="checkbox"/> Within the quarter <input type="checkbox"/> Other:
Monthly Budget (USD)	
Timezone requirements	(e.g. EST overlap is required with U.S. counterparts)
What gaps in the business are they meant to solve?	(i.e. answers the question of "why does the role exist and how does it help the organization fulfill its objectives?")
Who will they work closely with?	(e.g. name key stakeholders and/or team)
Who will they report to?	
What does their day-to-day life look like?	
What are their core responsibilities and accountabilities?	Please keep the following in mind: <ul style="list-style-type: none"><li>● Be outcome-focused, rather than process focused</li><li>● List should be ordered in importance and/or frequency</li><li>● Start with a verb (e.g. prepare, coordinate, manage, lead)</li></ul>
What does "good" look like in:	(i.e. What are the key goals and milestones that the new hire should meet in 3-6-12 months' time?)
3 months	

# Template 2 — ContactOut's Intake Form

4

## Core Responsibilities

Of course, you can't miss core responsibilities. This translates nicely to a "What You'll Do" section in a job description.

5

## Goals & Milestones

You could also clarify what "good" looks like in a 3 month, 6 month, 9 month timeframe. This helps you with measuring quality of hire down the line, and also allows the candidate to have a good picture of what will be expected of them going into the role.

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## Knowledge & Skills

To top it off, gather insights on what knowledge, skills and attributes the candidate should have. This is where the list can get long — so be sure to clarify which ones are absolutely crucial (must-haves) and which aren't (nice-to-haves).

7

## Next Steps

And once again, additional notes and next steps to wrap things up.

<i>What are their core responsibilities and accountabilities?</i>	Please keep the following in mind: <ul style="list-style-type: none"><li>● Be outcome-focused, rather than process focused</li><li>● List should be ordered in importance and/or frequency</li><li>● Start with a verb (e.g. prepare, coordinate, manage, lead)</li></ul>
<i>What does "good" look like in:</i>	(i.e. What are the key goals and milestones that the new hire should meet in 3-6-12 months' time?)
3 months	
6 months	
9 months	
<i>What knowledge, skills, and abilities should the right candidate possess?</i>	
<i>Knowledge</i>	Knowledge refers to a person's understanding and familiarity with information, facts, concepts, and principles related to a particular field of study or area of expertise (e.g. extensive knowledge of data structures and algorithms)
<i>Skills</i>	Skills refer to the practical abilities and competencies that a person possesses, which enable them to perform specific tasks, solve problems, or carry out activities effectively. (e.g. soft skills: strong communication skills, both written and verbal or hard skills: Java, PHP, and/or Python)
<i>Attributes</i>	Attributes, or personal qualities, refer to the inherent characteristics, traits, and attitudes that a person possesses, which influence their behavior, interactions with others, and overall performance. Attributes may include things like honesty, integrity, empathy, resilience, adaptability, and a positive attitude.
<i>Additional Notes</i>	(e.g. tools and technologies used)
<i>Next steps and action items</i>	

# Intake Form in Action (1/2)

We've gone ahead and reverse-engineered [this job ad](#) to give you an example of what a filled in intake form would look like.

Once the masterpiece (aka the form) is ready: It's review time! Loop in your hiring manager for a fresh perspective. Revise, refine, and then? It's time to begin your recruitment process (whew!).

Questions	Role title:
Hiring status	<input checked="" type="checkbox"/> New-role <input type="checkbox"/> Backfill for: <input type="checkbox"/> Limited or part-time engagement <input type="checkbox"/> Other:
Level (subject to further probing)	<input type="checkbox"/> <b>Junior level:</b> 0-3 years' experience is necessary. Extensive training and guidance will be provided <input checked="" type="checkbox"/> <b>Mid-level:</b> 3-5 years' experience is necessary. Some form of training and guidance will be provided. <input type="checkbox"/> <b>Senior-level:</b> 5-8 ++ years' experience is necessary. Minimal form of training and guidance is provided. <input type="checkbox"/> Other:
Target fill date	<input type="checkbox"/> Immediately <input type="checkbox"/> Within the month <input checked="" type="checkbox"/> Within the quarter <input type="checkbox"/> Other:
Monthly Budget (USD)	\$80-100k/annually
Timezone requirements	EST or PST overlap required
What gaps in the business are they meant to solve?	<ul style="list-style-type: none"> <li>The need for a new marketing program to broaden outreach and brand awareness.</li> <li>The need to communicate the state of the healthcare system and how COMPANY X is attempting to address its shortcomings.</li> <li>The need for a consistent voice and brand identity across various platforms.</li> </ul>
Who will they work closely with?	<ul style="list-style-type: none"> <li>Medical lead.</li> <li>One of the cofounders.</li> <li>PR agency</li> </ul>
Who will they report to?	<ul style="list-style-type: none"> <li>Co-founder with a dotted line to the Medical Lead</li> </ul>
What does their <u>day-to-day</u> look like?	<ul style="list-style-type: none"> <li>Crafting marketing messages and developing brand identity.</li> <li>Coordinating the production of marketing assets (videos, explainers, memes).</li> <li>Collaborating with various teams and agencies for marketing campaigns and product launches.</li> <li>Engaging with various social media platforms to drive engagement and awareness.</li> </ul>
What are their core responsibilities and accountabilities?	<ul style="list-style-type: none"> <li>Building a new marketing program across multiple channels.</li> <li>Crafting a message and brand identity for the company.</li> <li>Coordinating asset production for marketing.</li> <li>Collaborating with a PR agency for product launches and media placements.</li> </ul>
What does "good" look like in:	(i.e. What are the key goals and milestones that the new hire should meet in 3-6-9 months' time?)
3 months	Successful establishment or groundwork of the new marketing program, with

# Intake Form in Action (2/2)

We've gone ahead and reverse-engineered [this job ad](#) to give you an example of what a filled in intake form would look like.

Once the masterpiece (aka the form) is ready: It's review time! Loop in your hiring manager for a fresh perspective. Revise, refine, and then? It's time to begin your recruitment process (whew!).

	<ul style="list-style-type: none"> <li>• Coordinating asset production for marketing.</li> <li>• Collaborating with a PR agency for product launches and media placements.</li> </ul>
<i>What does "good" look like in:</i>	(i.e. What are the key goals and milestones that the new hire should meet in 3-6-9 months' time?)
<i>3 months</i>	Successful establishment or groundwork of the new marketing program, with noticeable traction in engagement metrics.
<i>6 months</i>	A clear and recognizable brand voice established across platforms, consistent engagement, and growth in the audience base.
<i>9 months</i>	Successful PR collaborations, increased media placements, and potentially a successful major product launch.
<i>What knowledge, skills, and abilities should the right candidate possess?</i>	
<i>Knowledge</i>	Familiarity with platforms like Youtube, TikTok, Instagram, etc., and email marketing tools like Iterable or MailChimp.
<i>Skills</i>	Excellent verbal and written communication, social media marketing, and potentially web design.
<i>Attributes</i>	Creative, organized, curious, and flexible

<i>Additional Notes</i>	<p>Tools of the trade from the most important to least:</p> <ol style="list-style-type: none"> <li>1) Social media platform know-how: TikTok, Instagram, LinkedIn, YouTube, Twitter</li> <li>2) Mailchimp</li> <li>3) Asset creation tools: Adobe Premiere Pro, Adobe Photoshop, Canva</li> <li>4) Project Management tools: Trello, Asana or Notion</li> </ol> <p>Existing hiring process:</p> <ol style="list-style-type: none"> <li>1) Recruiter screening (30m)</li> <li>2) Virtual interview with the hiring manager (45m)</li> <li>3) Live case study with the marketing team (1hr)</li> <li>4) Final interview with Cofounder</li> <li>5) Offer</li> <li>6) Reference checks</li> </ol>
<i>Next steps and action items</i>	<ul style="list-style-type: none"> <li>• Calibration: recruiter will gather 10 quality profiles within 1 week to share for feedback</li> <li>• Recruiter will provide 7 top applicants for hiring manager to screen for interview invites within 2 weeks</li> <li>• All notes will be maintained on applicant profiles ATS</li> </ul>

# Key Takeaways

## Get alignment

Alignment is your best friend; getting everyone on the same page will make your life 10x easier.

## Do your research

Research? It's your secret weapon. Use it generously.

## Ask the right questions


A form is only as good as its clarity. Make every question count.



# Further Resources

 **Hiring Manager-Recruiter Intake Meeting Questions**

 **ContactOut's Job Intake Form** (Our own template!)

 **Recruiting Intake Form Template**: Here's the basics. Turn it into your own

 **Template: Intake form by TalentDrop**