



New Dynamics

Policies and practice

Recruitment and selection: a structured process

Define role requirements, assess candidates consistently and document a fair hiring process.

Practical guidance · Worked examples · Printable worksheet

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Inside this guide

Start with the work the role must do	3
Make the assessment consistent	3
Decide using evidence and documented reasons	3
Worked example: a customer-support hire	3
Hiring decision worksheet	4
Review the candidate experience	4
Put the guide into practice	4
Frequently asked questions	5
Review the first cycle	6
About New Dynamics	6
Your working worksheet	7

Read in order for the full approach, or use the linked contents to find a section. The final worksheet gives you space to record decisions and next steps.

Define role requirements, assess candidates consistently and document a fair hiring process. This practical guide to recruitment and selection brings together a step-by-step approach, illustrative examples, a reusable worksheet and answers to common questions. Start with the section closest to your current challenge, then use the working session to turn the guidance into a clear next action.

Start with the work the role must do

Describe the outcomes and capabilities the role requires before writing an advertisement. Separate essential requirements from skills that can be learned. Challenge criteria inherited from a previous job description if they do not predict the work the person will actually perform.

Agree the hiring manager, interview panel, decision process and approval route. Check local requirements for advertising, candidate information, screening, adjustments and record retention. This guide is a process framework, not a jurisdiction-specific hiring policy.

Make the assessment consistent

Choose a small set of criteria and define what evidence would meet each one. Use job-relevant questions and, where suitable, a proportionate work sample. Tell candidates what to expect and provide an accessible way to request an adjustment or alternative arrangement.

Ask the core questions consistently while allowing clarification. Interviewers should record their evidence before discussing candidates together. This reduces the chance that the first confident opinion determines everyone else's assessment.

Decide using evidence and documented reasons

Compare each candidate with the agreed criteria. Avoid replacing those criteria with an unexplained judgement about "culture fit." Distinguish lack of evidence from evidence that a requirement is not met.

Record material disagreement and how it was resolved. Keep candidate information available only to the people who need it. Reference checks, verification and background screening should follow approved local processes and be proportionate to the role.

Worked example: a customer-support hire

Illustrative scenario: the role requires explaining a difficult process to a customer. Candidates receive the same fictional customer question and a short reference document. The exercise assesses accuracy, clarity and acknowledgement of uncertainty.

The panel does not reward an answer merely for sounding polished. It checks whether the candidate understood the supplied information and explained the next step. Candidates are

told how the exercise works and can request an appropriate adjustment through a named route.

Hiring decision worksheet

- **Role outcome:** What must the successful candidate be able to deliver?
- **Criterion:** Which essential capability supports that outcome?
- **Assessment:** What question or exercise provides relevant evidence?
- **Evidence:** What did the candidate actually demonstrate?
- **Uncertainty:** What was not assessed or needs clarification?
- **Decision:** How did the panel apply the criteria and resolve disagreement?
- **Communication:** Who informs the candidate and closes the process?

Calibrate the worksheet on fictional examples before interviews. Define rating anchors if scores are used; a number without an explanation is difficult to review.

Review the candidate experience

Check delays, withdrawal points, accessibility issues and the usefulness of assessments. Evaluate whether requirements excluded people unnecessarily and whether interviewers followed the agreed process. Use controlled aggregate reporting and appropriate local advice for equality analysis.

If AI supports drafting or administration, keep the purpose explicit and review outputs. The [AI recruitment guide](#) sets out a bounded approach. The [EEOC employer resources](#) provide a US starting point for equality responsibilities.

Put the guide into practice

Set aside a working session with the people who own this process and one or two people who experience it. Use a fictional or appropriately authorised case, so the discussion can be specific without sharing unnecessary personal information. The purpose is to leave with a usable decision or document, not just agreement that the topic matters.

Prepare the case

Choose a fictional vacancy and identify the outcomes the role must deliver. Write essential criteria and challenge any requirement that is not connected to the work. Ask how a candidate could demonstrate each capability through an interview, work sample or other appropriate evidence. Keep the assessment proportionate to the role.

Write the starting assumptions down before discussing solutions. If the group disagrees on what happened, identify the information needed to resolve that difference rather than building a plan on an untested story.

Work through the decision

Have interviewers independently assess a fictional answer using the proposed criteria. Compare the evidence they recorded before discussing scores. Where interpretations differ, improve the question or rating anchors. Avoid resolving every difference by accepting the most senior person's view without examining the actual response.

Ask each participant to explain the proposed decision in their own words. Differences in interpretation often reveal an unclear criterion, a missing responsibility or an instruction that will be difficult to follow.

Test an exception

Test a candidate who needs an accessible format or whose career history does not follow the expected pattern. Check whether the assessment still measures the relevant capability. Decide how missing evidence is clarified and how requests for support are handled without unnecessarily disclosing personal information to the whole panel.

Record what changes in this situation and what remains the same. An exception should lead to a clear next step, with an owner, rather than an informal workaround that nobody can explain later.

Agree the handoff

Prepare the decision record and candidate communication. Confirm who approves the offer, checks any required conditions and closes the process for other candidates. The handoff should preserve the evidence and reasoning needed for the approved record, while following the organisation's privacy and retention arrangements.

Finish by confirming the owner, the next action and the date when the result will be reviewed. Give the person receiving the work enough context to continue without repeating the whole discussion.

Frequently asked questions

Why use structured interviews?

A shared set of job-related questions and clear criteria makes it easier to compare relevant evidence. Structure does not mean ignoring clarification or treating candidates mechanically. It means deciding what matters before hearing the answers and documenting how those answers support the decision. Interviewers still need preparation, appropriate judgement and a way to handle accessibility needs or unusual circumstances.

Should a work sample be part of every hiring process?

Only when it provides relevant evidence proportionately. Consider the task, time burden, accessibility and whether candidates need information or tools to complete it fairly. Avoid asking for substantial unpaid work that the organisation intends to use commercially. Explain what is being assessed and how the result will be reviewed. Other methods may be more suitable for some roles.

How should a panel resolve disagreement?

Return to the agreed criteria and the evidence each interviewer recorded. Identify whether the disagreement concerns facts, interpretation or missing information. Clarify where appropriate through the approved process, then record the reason for the decision. Do not rely on an unexplained impression of fit or a vote that conceals material concerns about how the criteria were applied.

Review the first cycle

Review whether the process produced useful job-related evidence and whether candidates understood what was expected. Examine delays, repeated questions and inconsistent panel records. Improve the assessment where it creates burden without helping the decision, and check that changes remain aligned with the role and applicable requirements.

Keep a brief record of what was tried, what participants found useful and what needs to change. Compare the result with the original problem rather than judging success only by completion. If the process created extra work without improving clarity, quality or support, simplify it and test again. Share the agreed change with the people who will use it, and name the person responsible for keeping the guidance current.

About New Dynamics

[New Dynamics](#) connects goals, feedback, recognition and reviews around the way organisations work. This guide is published by the New Dynamics Editorial Team as part of our practical library for HR leaders, managers and People teams.

Use the examples and worksheets to structure your own discussions and adapt them to your organisation. Illustrative scenarios are not customer case studies. Policy and employment guidance needs appropriate local review before adoption.

For questions about this guide, corrections or a conversation about your performance management process, email contact@new-dynamics.com. Explore the complete [guide library](#) for related resources.

Your working worksheet

Use the prompts from this guide to prepare one real conversation or decision. Keep personal or sensitive information in your organisation's approved records. This page is for your own working notes.

Role outcome: What must the successful candidate be able to deliver?

Criterion: Which essential capability supports that outcome?

Assessment: What question or exercise provides relevant evidence?

Evidence: What did the candidate actually demonstrate?

Uncertainty: What was not assessed or needs clarification?

Decision: How did the panel apply the criteria and resolve disagreement?

Communication: Who informs the candidate and closes the process?

Discuss your next step with New Dynamics: contact@new-dynamics.com