

How to Use the Candidate Alignment Evaluation

Hiring isn't just about who *can* do the job on paper. It's about who will **thrive** in your environment, live out your values, and make your team stronger.

Most hiring problems aren't about talent.

They're about expectations that haven't been defined, communicated, or upheld.

People can't meet expectations that haven't been defined.

They can't align with standards that haven't been communicated.

And they can't be held accountable to things that only exist in the owner's head.

That's why this is built around three core pillars:

- **Clarity** – You'll define what your business actually stands for—how your team works, what you expect, and what you won't tolerate.
- **Alignment** – Once your standards are clear, you can attract people who are a natural fit—and coach or correct when they're not.
- **Accountability** – You'll have a reference point to lead from. It won't be personal—it'll be the standard. That's how consistency and trust are built.

This **Candidate Alignment Evaluation** helps you move beyond gut feel and resumes so you can consistently assess whether a candidate truly aligns with your culture and has the capacity to excel in the specific role you're hiring for. You'll evaluate five key areas:

1. Natural **capacity** to excel in the role
2. Alignment with your company **core values**
3. Alignment with your company **work style**
4. Winning **traits** that make people successful in this role
5. Your **non-negotiables**

Use this form during the interview to capture a clear, objective picture of how well the candidate aligns with what you actually need.

Important Notes

To get the most out of this tool, complete the “Expectation” columns **before** you start interviewing:

- Decide what success looks like in this role.
- Clarify the core values, work style, traits, and non-negotiables that matter most.
- Fill in each “Expectation” box with your own language based on your company standards.

This ensures every interviewer is evaluating candidates against the **same** criteria, not their own personal preferences.

Have each interviewer complete their own form independently, then compare notes. Look for patterns, not just one person’s opinion.

Ask questions that will give you the answers you need. Defining each of these elements and using this evaluation form keeps you away from generic and canned questions and gives you the information you need to make a confident hiring decision.

Keep this form in the candidate’s file. If you hire them, you can refer back to it to confirm they’re showing up the way you expected.

Section-by-Section Guide

1. Natural Capacity to Excel in Job Role Functions

What this is:

This section helps you assess whether the candidate has the natural capacity, strengths, and wiring to perform the actual day-to-day functions of the role—not just whether they *say* they can do it.

Capacity to thrive in the role consists of three main components:

1. **Abilities**- Inherent skills, talents, strengths
2. **Potential**- Ability to learn, grow, develop
3. **Bandwidth**, including:
 - a. **Mental** – Clarity, focus, decision-making space
 - b. **Emotional** – Stress tolerance, relational capacity
 - c. **Spiritual** – Inner peace, sense of purpose

- d. **Physical** – Energy, rest, and health
- e. **Time & Resources** – infrastructure, support, and systems

How to use it:

- In the **Job Function Expectation** rows, list 3–4 key responsibilities for the role (e.g., “Proactively follow up with leads,” “Manage multiple jobs at once,” “Accurately process orders,” “Handle customer issues calmly”).
- During the interview, ask role-specific and situational questions to see how they’ve handled similar responsibilities in the past.
- In **Assessment**, rate alignment based on whether their examples indicate natural capacity for the role.
- Use **Comments** to capture concrete examples (not just “good vibe”).

You’re looking for a **natural fit** between how they think and operate, and what this role demands every day.

2. Alignment with Company Core Values

What this is:

This section evaluates whether the candidate’s mindset, decisions, and behavior line up with your company’s core values.

How to use it:

- In the **Core Value Expectation** rows, list your core values and (ideally) a short behavior-based description (e.g., “We Do the Right Thing – tells the truth even when it’s costly”).
- Ask values-based questions and for real stories: “Tell me about a time you…”
- In **Assessment**, rate their alignment with each value based on what they share and how they show up in the conversation.
- Use **Comments** to note any strong evidence *for* or *against* each value.

If a candidate is a mismatch on values, that’s a major red flag—even if they’re strong technically.

3. Alignment with Company Work Style

What this is:

This section measures whether the candidate's preferred way of working fits how your company actually operates.

Key dimensions of work style include:

- **Pace** – The overall speed and urgency of how work gets done.
- **Structure** – The amount of organization, systems, and process control in daily work.
- **Collaboration** – The level of teamwork and shared decision-making expected.
- **Autonomy** – The degree of freedom and ownership individuals have in how they work.
- **Communication** – How information is shared, discussed, and resolved.
- **Decision-Making** – How choices are made and who has authority.

How to use it:

- In the **Work Style Expectation** rows, describe what's required to thrive in your environment (e.g., "Fast-paced and deadline-driven," "High collaboration with field teams," "Independent, minimal supervision," "Comfortable with change and ambiguity").
- Ask about how they like to work, their ideal environment, and past experiences (onsite/remote, structure vs autonomy, pace, communication habits).
- In **Assessment**, rate alignment based on how closely their work style matches your reality—not the ideal they wish they had.
- Add **Comments** to note anything that will either help or hinder them in your day-to-day environment.

Even great people can fail in the wrong work environment. This section helps you see that ahead of time.

4. Winning Traits

What this is:

These are the personality and character traits your top performers share—the things that make someone truly successful in this role and on your team.

How to use it:

- In the **Personality/Character Trait** rows, list the traits that matter most (e.g., “Humble and coachable,” “Resourceful problem-solver,” “Calm under pressure,” “Takes ownership,” “Relational and kind”).
- Listen for examples in their stories that show or contradict these traits.
- In **Assessment**, rate alignment to the degree to which they consistently demonstrate each trait.
- Use **Comments** to record specific behaviors or quotes that stood out.

This section helps you avoid hiring someone who “looks great on paper” but doesn’t show up the way your best people do.

5. Non-Negotiables

What this is:

Your non-negotiables are the behaviors, attitudes, or work habits that, if present in an employee, disrupt team dynamics, lower morale, or negatively impact performance.

How to use it:

- In the **Non-negotiables** rows, list your key dealbreakers (e.g., “Lack of accountability,” “Chronic negativity,” “Dishonesty,” “Entitlement,” “Resistance to feedback”).
- Confirm each non-negotiable clearly in the interview—don’t assume.
- In **Assessment**, rate alignment based on any evidence of red flags.
- Use **Comments** to capture specific stories, phrases, or reactions that signal either a green light or a red flag.

Generally, a ● here should heavily weigh toward a **Pass**. If you compromise on your non-negotiables now, you’ll pay for it later.

Candidate Alignment Evaluation

Candidate Name: _____

Interviewer Name: _____

Date: _____

Role: _____

Instructions:

Use this assessment to evaluate whether a candidate aligns with the company's values, work style, traits, non-negotiables, and role expectations. Rate each category based on their responses and overall impression.

Rating Criteria:

 **Not a fit** – The candidate does not meet expectations in this area and demonstrates significant misalignment with company values, work style, or job requirements.

 **Somewhat a fit** – The candidate meets some expectations but has noticeable gaps or inconsistencies that may require development, coaching, or further assessment.

 **Strong fit** – The candidate consistently aligns with expectations, excels in this area, and demonstrates strong potential to contribute positively to the team and company.

1. Natural Capacity to Excel In Job Role Functions

Job Function Expectation	Assessment	Comments
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	

2. Alignment with Company Core Values

Core Value Expectation	Assessment	Comments
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	

3. Alignment with Company Work Style

Work Style Expectation	Assessment	Comments
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	

4. Winning Traits

Personality/Character Trait	Assessment	Comments
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	

5. Non-negotiables

Non-negotiables	Assessment	Comments
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	
	<input type="checkbox"/> Not a Fit <input type="checkbox"/> Somewhat a Fit <input type="checkbox"/> Strong Fit	

Final Hiring Decision

Based on the assessment, select the option that best describes the candidate's overall alignment with the company's **core values, work style, winning traits, non-negotiables, and job role requirements.**

Pass – The candidate does not demonstrate the necessary alignment with company values, work style, or role expectations. Their skills, mindset, or approach are not a fit for the team, and they are unlikely to succeed in this environment. Moving forward with this hire would pose long-term challenges.

Further Review – The candidate shows some alignment but has inconsistencies that raise concerns. With additional assessment, clarification, or coaching, they may be able to meet expectations. Further discussion is needed before making a final decision.

Next Steps And/Or Offer – The candidate strongly aligns with the company's values, work style, and role expectations. They bring the right skills, mindset, and personality traits to contribute positively to the team. Moving forward with next steps or extending an offer is recommended.

Interviewer Signature: _____