



The Hiring OS Toolkit

- Alignment Criteria
- Questions + Evidence
- Decision

ALIGNMENT CRITERIA

Define what “right” looks like for your business *before* you evaluate humans.

Create Brand Profile

Company Clarity

This defines the character someone needs to have to thrive in your company.

1. Purpose/Mission- Company's overarching reason for existing beyond making money.

This is the “why” behind everything you do—the impact you want to have on people, your industry, or your community. It acts as a long-term North Star, helping you decide which opportunities to pursue, which to decline, and how to stay grounded when the business grows or changes.

2. Values- The foundational principles that guide decision-making, behavior, and company culture.

Values define how people are expected to show up—especially under pressure. They should be described in simple, concrete language and tied to real behaviors so they can be used in hiring, recognition, feedback, and tough conversations.

3. Work Style- How work gets done within our company and overall energy, vibe, and experience of the workplace.

This covers pace (fast and scrappy vs. steady and methodical), communication (direct vs. diplomatic), structure (highly defined vs. flexible), and collaboration (team-driven vs. independent). When clearly defined, it helps you attract people who thrive in your environment and avoid friction from mismatched expectations.

4. Traits- Character & personality traits an individual needs to have to thrive in our company.

These are the qualities your best people have in common—things like ownership, curiosity, resilience, or attention to detail. Naming these traits gives you a lens for recruiting, interviews, promotions, and development so you're consistently growing the kind of people who move the business forward.

5. Non-negotiables- Behaviors or traits that will not be tolerated.

Non-negotiables draw a clear line in the sand around attitudes and behaviors that damage trust, culture, or performance (for example: gossip, dishonesty, or disrespect). Writing these down gives leaders permission to address issues early, make hard calls when needed, and protect the health of the team.

6. Differentiators- What sets us apart from competitors.

These are the real, tangible reasons someone would choose you over another option—your approach, expertise, process, results, or experience that others can't easily copy. Differentiators should be provable, not generic claims, and they should show up clearly in your messaging and operations.



Create Candidate Profile

Role Clarity

This is specific to each role you're hiring for and defines the capacity someone needs to have to excel in the role.

1. Role Responsibilities – The daily actions and functions of the position.

Don't list every minor task. Focus on the core accountabilities that keep the seat moving. Clarity here ensures the candidate knows exactly what they are signing up to manage.

2. Outcomes – The measurable results and "wins" that define success.

Responsibilities are about activity; outcomes are about achievement. This defines what "good" looks like six months in. If the person does the tasks but doesn't hit these markers, they aren't the right fit for the role.

3. Capacity to excel – The specific abilities, potential, and bandwidth required.

Define the inherent abilities someone needs to have that don't need to be coached.

4. Character to thrive – The personality traits required specifically for this environment.

Pull from your core values, work style, and traits sections of your Brand Profile.

5. Qualifications – The baseline requirements, certifications, or experience levels.

Whether it's a specific degree, industry experience, or software mastery, these act as your first-level filter to ensure the candidate has the foundational tools to do the job

6. Red flags- Role-specific warning signs.

These are the behaviors that signal future failure in this specific role.

Don't move on until both profiles are clearly defined. Everything that comes next maps back to this criteria.

Create Two Scorecards

Objective Evaluation Tools

Scorecard A to evaluate Capacity

- **The Goal:** Determine if they have the natural wiring, skills, and bandwidth to excel in the seat.
- **Where it comes from:** Pull the Abilities and Role Red Flags from your *Candidate Profile*.

Scorecard B to evaluate Character

The Goal: Determine if they share your values and have the temperament to thrive in your specific culture.

Where it comes from: Pull the Traits, Values, and Non-negotiables from your *Brand Profile*.

Scorecard Template

Objective: Determine the candidate's capacity to excel in this role OR character to thrive in our company

Candidate: _____ Date: _____

Interviewer: _____ Interview: Capacity or Character

Role:

Evidence Rubric (1-3)

1 = No evidence (vague, hypothetical, unclear role, inconsistencies, or red flag)

2 = Weak evidence (real example but thin details, unclear impact, not a pattern)

3 = Strong evidence (clear real example, specific actions + outcome, consistent under follow-up, shows repeatable pattern)

Criteria (Capacity or Character)	Score (1-3)	Evidence-based notes
	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	
	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	
	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	
	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	
	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	
	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	

Red Flags/Non-negotiables (Check All That Apply):

- Red Flag 1: _____
- Red Flag 2: _____
- Red Flag 3: _____
- Red Flag 4: _____
- Other: _____

Notes

Concerns:

Strong Positives:

Decision

- Reject – Not aligned. Evidence does not meet expectations for this role.
- Further Review – Mixed signals. More evidence needed before deciding.
- Advance – Strong alignment. Evidence supports moving forward.

Why

QUESTIONS + EVIDENCE

Gather evidence to verify capacity and character alignment.

Questions

Create two high-signal question banks that map back to criteria

1. Question Bank A maps to Capacity criteria from Candidate Profile
2. Question Bank B maps to Character criteria from Brand Profile

Questions are about depth, not quantity

- spend more time digging deeper on fewer questions.
- depth exposes claims by asking for evidence
- look for an honest answer, not a “right answer”

Start with one broad, open question

Pay attention to what happens before you ask a single follow up.

How they answer will tell you a lot.

- Do they stay safe and guarded?
- Only answer the bare minimum?
- Volunteer information?
- Do they provide specifics on their own?
- Stick to vague generalities?
- Do they pause and reflect?
- Do they spout something off immediately?
- How much do you have to prompt?

How To Ask High-Signal Questions

Level 1: Tell me about a time when...(open question)

Level 2: Tell me more about that (invite more detail)

Level 3: What does that look like in your life? (Look for evidence)

Level 4: How does that show up in other areas of your life? (Look for patterns)

Level 5: Can you give me some specific examples? (Check for consistency)

Level 6: Why does that matter to you? (Reveals the belief/thoughts that drives decisions and behavior)



Evidence

“

“Everything you need to know about an individual has been shaped by what they have lived through up until this point.”

1. Real life examples

Details, timelines, specifics- based on things that have actually happened

2. Patterns

- Show up in multiple areas- professional life + personal life
- How someone operates as a person (wiring/skills/character/values/behaviors/motivation) is the same.

3. Consistency

- Work story + life story should match the same trait
- Scripted candidates struggle to produce real-life proof

Structure

Outline your interview to facilitate connection and get candidates to actually open up.

The 2-Interview Structure

Separate the interviews into two distinct focuses. This isn't just about scheduling; it's about layering trust.

- **Interview A: Capacity (The “Can You Do It?” Check)** We start here to ensure the “wiring” is right. We focus on abilities, systems, and patterns of work. By the end of this conversation, you've built the initial rapport needed to go deeper in the next step.
- **Interview B: Character (The “Who Are You?” Check)** The candidate's guard is naturally lower so you can move into values, non-negotiables, and how they handle life's gray areas. This is where you verify if they are a “Right Person” for your company.

A rigid, formal interview feels like an interrogation, which causes candidates to stay guarded and scripted. To get real evidence, you must create a conversational environment where the candidate feels comfortable enough to be honest—even about their mistakes.

The Interview Outline

Every interview should follow a consistent flow to ensure you are setting expectations while also building a baseline for the candidate's personality.

1. **Introductions & “The Room”** Always have at least two people from your team present. This creates a conversational dynamic and allows you to banter. When the candidate sees you and your teammate joking or interacting naturally, they realize it's safe to be themselves.
2. **Establish the Baseline (Rapport Building)** Spend the first few minutes on “low-stakes” talk—hobbies, favorite teams, or what they do for fun. You are looking for their natural baseline: *How fast do they talk? Do they make jokes? Are they naturally serious?* You need this baseline to know when they later become “scripted” or “guarded” during the hard questions.
3. **The “Mini Company Pitch” (The Scare Test)** This is a 60-second summary of your Differentiators and Non-negotiables. You are essentially saying: *“This is who we are, and this is what we don't tolerate. If this isn't you, get out now.”* This excites the aligned candidate and scares off the misfit.
4. **Evidence-Based Questioning** Move into your Question Bank. Use the “Tell me about a time when...” format. Stop talking and let them fill the silence. Your job is to dig for the roots of their stories.
5. **Role Clarification & Closing** Give them space to ask you questions. This reveals their curiosity and priorities (Red Flag check: are they only asking about pay and status?). Finally, clearly define the next steps so they aren't left wondering.

Pro Tip: Keep the same people in the room for both interviews. This helps you build the trust and connection needed to lower the guard of your candidate. This helps them feel more comfortable and helps you get a glimpse into who they really are.

DECISION

Eliminate gut-feel final decisions.

Score The Evidence

1 = No evidence- Can't verify this is real or repeatable.

- Vague, hypothetical, general
- Rehearsed
- Inconsistent
- Can't give a real example
- Lacking specific details
- Contains a red flag

2 = Weak evidence- Possible signal, but not enough proof.

- Believable but light detail
- They provide an example, but it's thin or incomplete
- Reflection is generic
- Mostly "we" language; their contribution is not specific
- Behavior feels situational, not repeatable

3 = Strong evidence- Clear proof this is how they operate.

- Gives a clear, specific, believable example (context → actions → outcome)
- Their personal actions are concrete and detailed
- Follow-up questions reveal no holes in the story
- Can articulate what they learned or would do differently
- Displays repeated pattern across examples

Set The Bar

Set a numerical bar to eliminate subjectivity.

Fail: any 1s

Pass: no 1s AND $\geq 30\%$ 3s (minimum avg of 2.35)

Strong Hire: no 1s AND $\geq 50\%$ 3s (minimum avg of 2.5)

Important: Each interviewer fills out their own scorecard during the interview while the evidence is fresh. Compare notes afterward to see where the evidence aligns or where you have “mixed signals.”/

Make a Decision

1. **Reject** – Not aligned. Evidence does not meet expectations for this role.
2. **Further Review** – Mixed signals. More evidence needed before deciding.
3. **Advance**– Strong alignment. Evidence supports moving forward.

Universal Red Flags

Every company has unique red flags based on character fit and role fit that you have to define for yourself first.

But these are the red flags that tend to stand across the board—the ones I’ve seen over and over that cause problems no matter the company or role.

1. Failure to Show Up or Reschedule Properly

This is a non-negotiable deal-breaker. If a candidate no-shows without proactive communication, it indicates a lack of respect for commitments. Even with an excuse like traffic or technical issues, the failure to text or call ahead of time suggests this pattern will repeat once they are hired.

2. Failure to Accept Calendar Invitations

While not always a deal-breaker, it is a signal worth noticing. It can point to disorganization, lack of attention to detail, or low comfort with basic tools (especially for remote/hybrid roles). Small things like this often reveal bigger patterns.

3. Using AI During the Interview

In virtual settings, look for “eye drops” (reading notes on a screen) or unnatural pacing and cadence. If a candidate uses AI to script their answers, they are choosing to be deceitful rather than authentic. You want the real person, not a rehearsed bot.

4. Slow response and delayed follow-through

Responsiveness is a reliability signal. If it takes days to reply, confirm, send requested info, or complete a step, pay attention — because the hiring process is the easiest they’ll ever have it. If you’re not impressed upfront, it usually gets worse once they’re comfortable.

5. Over-focus on pay and benefits

Comp matters. But if pay/benefits becomes the *main thread* — repeatedly — it can signal that money/security is the primary driver. That often translates to “I’ll stay until something better shows up.” Not always a disqualifier, but it deserves deeper questions about motivation and priorities.

6. Over-focus on promotion and status

This can signal they may see the job as a stepping stone to validation through status. If someone is fixated on being promoted, or they frame past roles primarily through status and being overlooked, you may be hiring someone who will become resentful if their timeline isn’t met and leave for the next opportunity to improve their status.

7. Lack of strong personal relationships

Healthy relationships outside of work often correlate with healthier relationships inside of work. Friendship and family dynamics teach communication, teamwork, repair after conflict, humility, and trust. If someone seems isolated or can’t speak to meaningful relationships, it can be a signal to dig deeper.

8. Oversharing and drama

Chaos and constant emergencies can be a boundaries issue. If someone dumps overly personal details in an interview, it can signal poor discernment, weak filters, or a pattern of instability — which often spills into missed work, conflict, distraction, and emotional exhaustion for the team.

9. Overemphasis on hobbies over professional growth

You want people to have a life. You’re not looking for workaholics. But if the energy is clearly “work is just a paycheck and I’m not invested in doing excellent work,” that can be a misalignment depending on your standards and role expectations. This one is usually a “dig deeper” flag.

10. Generic, vague answers (claims without proof)

“I’m hardworking, detail-oriented, coachable” means nothing without evidence. The red flag is when they can’t provide real examples, specifics, outcomes, timelines, or trade-offs. Vague answers often signal low self-awareness, exaggeration, or lack of real experience.

11. Sugarcoating everything (no flaws, no failures, no lessons)

If every story is polished and perfect, you’re not hearing the truth. Strong people can own mistakes, talk about hard lessons, and explain how they changed. The absence of imperfection is often the biggest tell.

12. Too polished and too wordy (lots of confidence, little substance)

You ask a question and they launch into a five-minute monologue. Lots of words, lots of confidence, quick answers... but then you realize: They didn’t actually say anything. No pause. No reflection. No “Let me think about that.”

We want to ask questions that make people pause and think.

13. Blaming others for past failures

If every story is finger-pointing—bad boss, terrible coworker, clueless manager, nightmare client—and it’s never their responsibility...you’re likely dealing with low ownership, low humility, and a high likelihood of conflict. This is one of the most predictive red flags for culture damage.

14. No genuine connection in the interview

If they stay guarded, performative, or overly polished and you can’t get a glimpse of who they actually are, you can’t make a wise decision. The real person always shows up eventually — usually after the offer. If you can’t see them now, you’re guessing.

And sometimes you just don’t connect. Trust that. Because at the most basic level, you are choosing who you and your team spend 40 hours a week with.

If you don’t like them now, don’t hire them.

10 Ways To Gather More Evidence

If you're ever unsure about a candidate, just take the time to get more evidence. These 10 options take varying degrees of time and effort. But even if you did all 10, it would still be worth it—because the cost of a mis-hire is always higher.

1. Additional interview with a new perspective

Add another conversation but change the dynamic by bringing in a different person. A coworker, employee, someone with a strong read on people. A different personality and communication style will pull out things you didn't see in interviews 1 and 2.

You also get another set of eyes and a different viewpoint.

Sometimes all it takes is one new perspective to either confirm your confidence... or confirm your hesitation.

2. Off-site interview

Change the environment by getting out of the interview room. Grab coffee. Lunch. Drinks. Dinner. It's informal and you're not just listening to what they say. You're observing their behavior. Things like: social awareness, conversation ability, how they treat staff, what they do naturally in a real setting (thank you, opening doors, basic awareness).

This environment creates a different lens to look at someone through. And those little actions tell you a lot more about a person than what they choose to say in a formal interview.

3. Personality assessment

Personality assessments are another lens. I personally like the DISC, Enneagram, and StrengthsFinder. The results will tell you new information, but so will their behavior through the process. Because you're asking them to do something. Are they willing, hesitant, enthusiastic? How fast do they complete it? Do you have to follow up?

This matters because we're always analyzing this question: Does what they say about themselves match how they show up?

Actions will tell you what words won't.

4. Skills assessment or a live working session

This is one of the best ways to verify capacity. Send a skills test—or better, do a live working session (in person or screen share). Especially with AI everywhere, it's harder to verify what's organic. Watch how they think, how they solve problems, how they work under light pressure. And again, you're not just looking at the results, you're observing their behavior through this as well.

I'm a huge believer in asking candidates to do something in the interview process. We want them to put in effort beyond just showing up and interviewing well.

5. Tour

Walk them through your environment—office, operations, facilities. It helps them understand what they're saying yes to, and it gives you a ton to observe: curiosity, engagement, humility vs arrogance, what they notice, what questions they ask, how they interact with people you pass.

Even a quick 20-minute walkthrough can reveal a lot.

6. Meet and greet with your team

This might happen during a tour, but it can also be its own step. Be intentional about introducing them to your team members. And pay attention to two things:

- How do they interact with your team? Do they start conversations, ask questions, seem guarded, relax, crack jokes, feel natural?
- What do your people sense afterward? Your team has instincts—and they're the ones who will work with this person. Listen to their observations.

Sometimes it's helpful to leave the candidate alone with your team for a few minutes and step away. Because when the decision-maker isn't around, guards drop. People reveal more of what they really think, what they really say, how they really act. And then trust what your team tells you.

7. Job shadow

This takes more time and more scheduling effort, but it's one of the most valuable forms of verification and it's cheaper than onboarding a mis-hire. It can be a few hours or a full day. This gives the candidate a chance to see the real day-to-day so they have a clear understanding of what the job actually is. This also gives you real observation time: attention to detail, attitude, engagement, communication, interest, questions, connection.

One job shadow day is so much more worth it than making the offer and then investing in onboarding and training only to have it fall apart weeks or months later.

8. Google search

This is verification through public records. Google their name + location. Do articles, interviews, or situations come up that raise questions?

I once sat in on an interview where a candidate told a version of a story that made him sound like the victim. My red flags were on high alert. I wanted to believe him, but something inside me was like, "I don't feel right about this." So I did a quick Google search, found an article about him, and within the first paragraph there were inconsistencies with what he had shared. That was a deal breaker.

9. Social search

This is verification through social presence. Facebook, Instagram, LinkedIn. What are they posting? What comments are they leaving? Are they stirring the pot? Outspoken and controversial?

You're checking alignment between what they say and what you see.

10. Reference checks

Verification through other people. I recommend asking for different types: personal, professional, coworker, manager, even subordinate when applicable. Don't just get three coworker references. You want references from different facets of their life so you can verify patterns and consistency around both capacity and character.

Does what the candidate says about themselves align with what other people say?

Want this done for you in less than 30 days?

We build and implement your Hiring OS in less than 30 days.

To get started, you place a fully refundable deposit. You only pay the remaining balance after the system is successfully implemented—tools delivered, training complete, process live.

If you choose to stop before implementation, you get 100% of your deposit back.

Done for you deliverables

Everything is built for your company and the role(s) you're hiring—no generic templates.

- **Brand + Candidate Profiles** -A clear definition of what “great” looks like—and what to reject.
- **Recruiting Messaging & Job Description** - Attract more right-fit candidates and repel misfits earlier.
- **Interview Scorecards** - Objective evaluation so decisions aren't driven by gut feel.
- **High-Signal Interview Questions**- Evidence-based prompts that reveal patterns rehearsed answers can't.
- **Interview Structure + Scripts** - An interview that facilitates genuine connection and gets candidates to actually open up.
- **Decision Framework** - Clear advance/reject criteria so you hire with confidence.

Done with you implementation

- 2-hour virtual Clarity Workshop to define alignment criteria
- Live/virtual implementation training for leadership/managers
- 3x 1:1 implementation coaching calls
- Interview shadow/review (pre + post)
- Client Training Portal: 24/7 lifetime access to videos + tools
- Email support

Book a Hiring OS Qualification Call

We onboard one new client per week to protect build quality and implementation speed. We're often booked several weeks (sometimes months) in advance. Book a qualification call to reserve the next available start date (*pending fit*).

[Book A Qualification Call](#)