KNOWLEDGEVAULT RESOURCES | CHECKLISTS & ASSESSMENT TOOLS

Recruitment Preparation Checklist

A practical, printable guide to help HR professionals and hiring managers prepare for a recruitment exercise before the vacancy is advertised.

USE THIS CHECKLIST TO GET READY

Work through the sections before advertising a vacancy or inviting applications. Mark each item when it is complete, and record any action that still needs an owner or approval.

Prepared for: HR professionals, recruiters, line managers and small-business owners

Format: Printable working checklist

Workplace Intelligence for professionals who want to move forward with clarity.

How to use this checklist

Complete the checklist with the person responsible for the vacancy. If an item does not apply, mark it “N/A” and briefly note why; if it is incomplete, record the next action and who will take it.

Recruitment details

Role / job title		**Department / team**	
Hiring manager		**Checklist date**	
Planned advert date		**Recruitment reference**	

A QUICK NOTE

This checklist supports preparation. It does not replace your organisation’s recruitment policy, approval process, employment law obligations or any required safeguarding and data-protection procedures.

1. Confirm the vacancy

- ■ The reason for recruiting is clear (for example, replacement, growth or a new role).
- ■ The need for the role has been discussed with the relevant manager.
- ■ The proposed role fits the team’s current responsibilities and structure.
- ■ Any internal options, such as redistribution of work or internal recruitment, have been considered where appropriate.
- ■ The expected start date and urgency of the appointment are understood.

2. Obtain the necessary approval

- ■ The vacancy has been approved by the person or team with authority to recruit.
- ■ The position is included in the approved staffing plan, or an exception has been authorised.
- ■ The salary range or pay arrangements have been confirmed with the appropriate person.
- ■ The budget for recruitment costs, if applicable, has been checked.
- ■ Any required finance, HR or senior-management approval has been recorded.

3. Define the role and requirements

- ■ The job description is current and reflects the work the successful candidate will actually do.
- ■ The main duties and expected outcomes are clearly stated.
- ■ Essential requirements are separated from desirable requirements.
- ■ Required qualifications, licences, experience or technical skills have been verified as necessary for the role.
- ■ The reporting line, work location, working pattern and employment type are clear.
- ■ The role requirements are relevant to the job and do not introduce unjustified barriers.

4. Prepare the vacancy advert

- [ ] The advert uses a clear and accurate job title.
- [ ] The duties, essential criteria and application instructions match the approved role information.
- [ ] The salary or pay information is included where required or appropriate.
- [ ] The advert explains the location, working arrangement and closing date.
- [ ] The application route and contact point for queries are correct.
- [ ] The advert has been checked for clarity, accuracy, inclusive language and avoidable errors.

5. Plan the selection process

- [ ] The selection stages have been agreed before applications are reviewed.
- [ ] The shortlisting criteria are linked to the essential and desirable role requirements.
- [ ] The people responsible for shortlisting and interviewing have been identified.
- [ ] Interview questions or assessment tasks will test relevant job requirements.
- [ ] A consistent scoring or evaluation method has been agreed.
- [ ] Any reasonable adjustments candidates may request can be considered through a clear process.

6. Confirm people, time and resources

- [ ] The recruitment team knows its responsibilities and deadlines.
- [ ] Time has been set aside for application review, interviews and decision-making.
- [ ] Interview rooms, online meeting links or assessment facilities can be arranged if needed.
- [ ] Any recruitment system, application mailbox or file location is ready for use.
- [ ] The people involved know how to handle candidate information confidentially and securely.

7. Check fairness, compliance and records

- [ ] The recruitment process follows the organisation’s current recruitment policy.
- [ ] Relevant employment, equal-opportunity, safeguarding or professional requirements have been checked where applicable.
- [ ] Any conflicts of interest among decision-makers have been identified and managed.
- [ ] Candidate information will be collected, accessed, retained and disposed of in line with applicable data-protection rules.
- [ ] The required approvals and key decisions will be documented.

Final readiness check

Before the vacancy is advertised, review the points below with the hiring manager or authorised approver.

- ■ The vacancy and any required budget or staffing approvals are confirmed.
- ■ The job description and advert are accurate and consistent.
- ■ The selection criteria, stages and evaluation approach are agreed.
- ■ The people, time and resources needed for recruitment are available.
- ■ The recruitment team understands the process and how candidate information will be handled.
- ■ The vacancy is approved for release.

Outstanding actions

Use this table to capture anything that must be resolved before the advert goes live.

Outstanding item	Action required	Owner	Due date

Prepared by		**Date**	
Approved by		**Date**	

READY TO ADVERTISE?

If any essential approval, role information or selection arrangement is still missing, resolve it before the vacancy is published. Record any exception according to your organisation's procedures.

About KnowledgeVault Resources

KnowledgeVault Resources provides workplace intelligence for professionals who want to move forward with clarity, including practical resources on Training and Quality Management, Workplace Navigation and Career Strategy.

This checklist is a general planning aid. Adapt it to the role, organisation and applicable local requirements before use.