Guide to Hiring Plan

Requisition Best Practices
For Super Admins

Hiring Plan Basics

Hiring Plan enables the use of requisitions, which hold details and notes about hires you want to make. Store job information, perform budget forecasting and keep stakeholders aligned on recruitment needs.

Contents

1. Hiring Plan workflow

When using Hiring Plan, we recommend following this general workflow:

- View, create and take action with requisitions from the **Hiring Plan page**.
- **Create a requisition** for every hire you plan to make. One req per hire, even if multiple people will be hired for the same job.
- Send reqs for **approval**. Assigned approvers can reject or accept the req details.
- **A Requisition Owner opens** the req and publishes the job when recruiting begins.
- The Requisition Owner and a Hiring Manager **conduct the hiring process**.
- **The Hiring Manager fills the req** by moving the Candidate to the Hired step in Workable and inputting salary and start date details. (Alternatively, the Requisition Owner can do this.)

Throughout your hiring, reports and forecasting tools enable your organization to keep track of your hiring budget and new hire start dates.

This guide will walk you through setup options for your requisition users and workflows and take you through the process of filling a req.

Requisition	Department	Location	Hiring manager	Salary	Plan date	Status
3 Finance Manager	Finance		Natalie Sung	$60,000.00/year	August 2019	
1 Account executive	Sales		Natalie Sung	$60,000.00/year	August 2019	OPEN
10 Lead UI Designer	Engineering		Eduardo Vallente	$63,000.00/year	August 2019	FILLED
2 Head of Account Management	Sales		Eduardo Vallente	$60,000.00/year	September 2019	APPROVED
5 Lead UI Designer	Engineering		Eduardo Vallente	$60,000.00/year	October 2019	REJECTED

Add a draft requisition

2a. Setup access rights

Ensure that people who will approve or manage reqs have been invited to Workable with the right permissions.

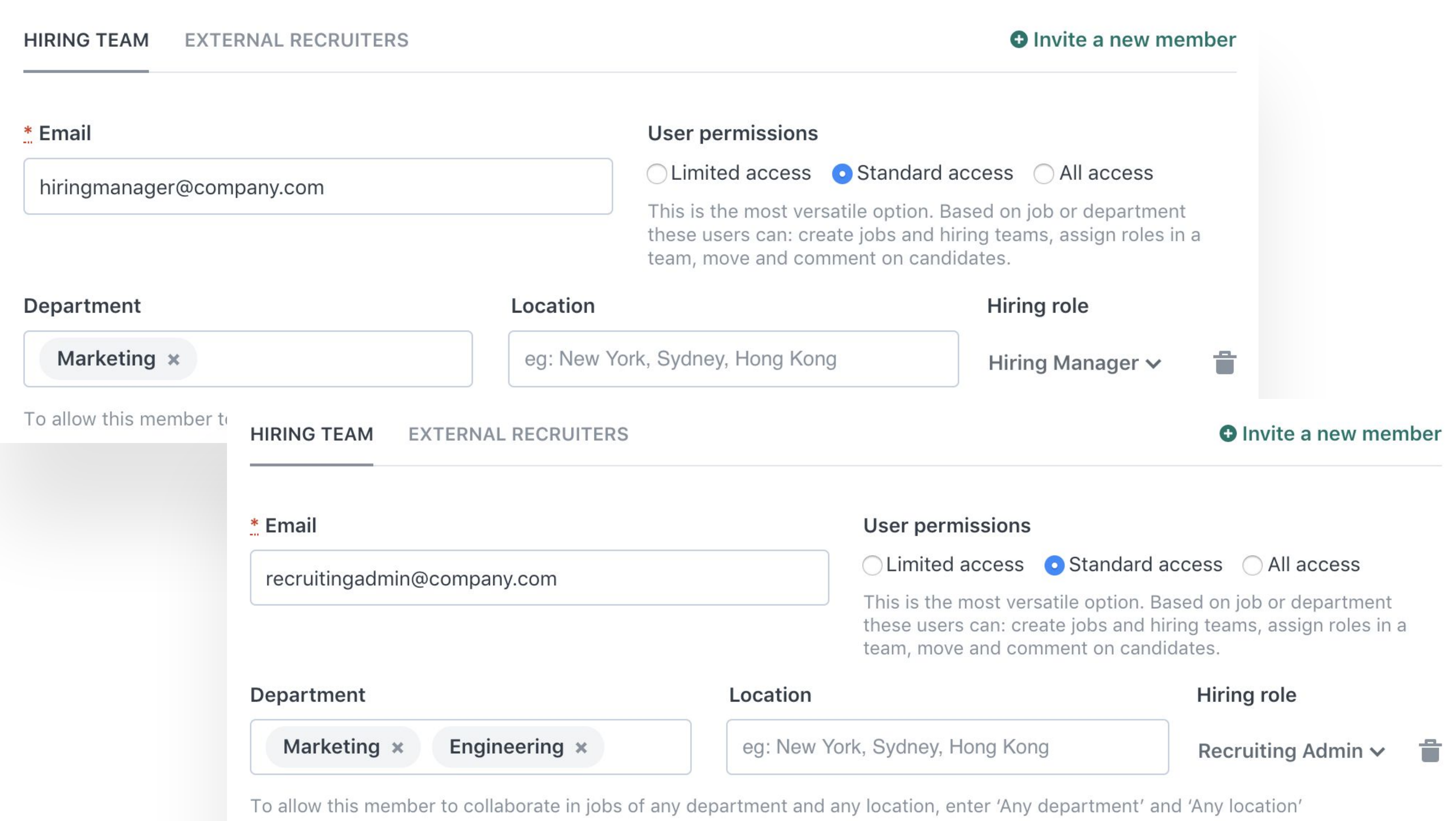
Users need the right permission level and account role to take on requisition roles like Requisition Owner or Hiring Manager.

- A Requisition Owner: Opens the req and publishes the job.
- A Hiring Manager: Makes the hiring decision and marks the req as ‘filled.’

Go to your Account Members settings to invite or edit users.

For each user, set their user permission level, department(s)/location(s) and hiring role. This will lead to easier and faster req creation.

Requisition roles are set later, during req creation.



2b. Setup access rights

Users who need full account access and data visibility

These people are often Recruiting/HR leads, Finance team members or senior execs. They will be able to see all data in Workable.

- Permission Level: All Access
- Account Role: Super Admin
- Requisition Roles: Creator, Requisition Owner, Hiring Manager, Approver

Users who will manage reqs and publish jobs, but shouldn't have full account visibility

These people are often Recruiting/HR staff. They will publish jobs and open requisitions, but can only see data for their department/location.

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- Permission Level: Standard Access
- Account Role: Recruiting Admin
- Requisition Roles: Creator, Requisition Owner, Hiring Manager, Approver

Hiring decision makers

These people are often hiring managers. They will be able to see req details like salary and mark reqs as filled.

- Permission Level: Standard Access
- Account Role: Hiring Manager
- Requisition Roles: Creator, Hiring Manager, Approver

Requisition approvers

These people are often staff who only approve or reject req details. They might be executives who are not generally involved with hiring.

- Permission Level: Limited Access
- Account Role: Reviewer
- Requisition Role: Approver

3. Workflow setup

Define the detail

Capturing rich, standardized data for every req leads to powerful end-to-end reporting. It also makes it easier for requisitions to be approved.

Click your user icon and go to your Hiring Plan settings to set up a requisition form that must be filled out each time a req is created.

Turn the default fields on or off and create your own fields based on your organization's process. The same form is used for all reqs and the fields can be adjusted, renamed or disabled at any time.

ON Automatically generate requisition codes

WBL | 1

Generated codes will look like this: WBL1, WBL2, WBL3...

Field	Type
Job title	Short text
Department	Dropdown
Location	Dropdown
Hiring manager	Dropdown
Requisition owner	Dropdown
Plan date	Date
Reason	Dropdown
Employment type	Dropdown
Experience	Dropdown

Establish workflow

Without approval, requisitions can't be officially opened. Eliminate bottlenecks by assigning named approvers—or groups of approvers—to review requisition details and provide sign-off.

Go to Settings in your user icon, then Hiring Plan. Choose:

- A default workflow to assign one or more approvers to all reqs
- Custom workflows to assign approvers according to departments and/or locations

Approvers are notified via email when a req is created and can review all req details. They must be users in Workable (but do not require special permissions). They can approve the req details or reject with a note, explaining what should be updated.

Natalie Sung · Bookkeeper · less than a minute ago
Natalie Sung asked you to approve the requisition for a Bookkeeper in Berlin

REQUISITION DETAILS

Code	WBL1
Job title	Bookkeeper
Department	Finance
Location	Berlin, Berlin, Germany
Hiring manager	Sophie Bell
Requisition owner	Natalie Sung
Plan date	October 2019
Reason	New Hire
Employment type	Full-time
Experience	Associate
Salary range	£30,000.00 - £40,000.00 per year
Approvers	Must be approved by: Eduardo Vallente

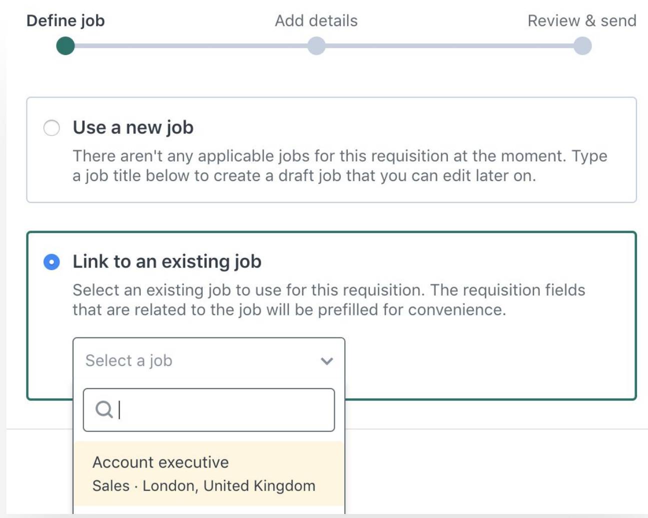
4. Add requisitions

Requisitions need to be created and linked to a job to be included in your hiring plan. You can create requisitions for jobs you're currently hiring for and for future roles. Including future reqs will help to pin down approval early on so you can get moving fast to advertise and hire when the time's right. It also helps with financial forecasting.

Create requisition

Go to the Hiring Plan tab on your Jobs page and select 'Create a new requisition'. You'll then be prompted to associate your requisition with a job.

One requisition is required for every hire you plan to make. If you plan to hire 5 Sales Associates, create 1 Sales Associate job and 5 requisitions (use the Clone function on the Hiring Plan to quickly reproduce a req).

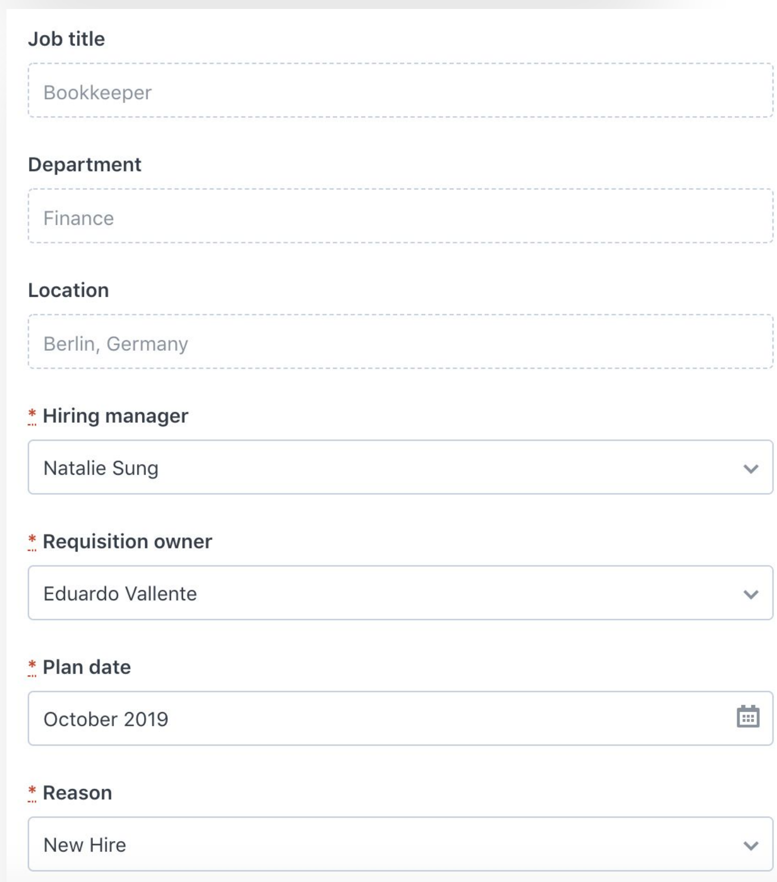


Define the job

Already got the job setup in Workable? Select 'Link to an existing job' and choose from the dropdown.

Need to create a job in Workable? Select 'Use a new job' and type in a job title (this creates a draft job, which can be edited and published at a later stage as soon as your req's approved).

Remember! One job can have many requisitions (for example, you might be hiring 4 people for the same role). If so, one req must be created for each opening, all attached to the same job. This ensures reporting is accurate.



Add the detail

The person creating the requisition needs to add in the associated details (Requisition Owner, salary range, start date, etc.) and submit the req for approval.

The Requisition Owner will be the person responsible for 'opening' the req and posting the job (one of the Super or Recruiting Admins set up earlier).

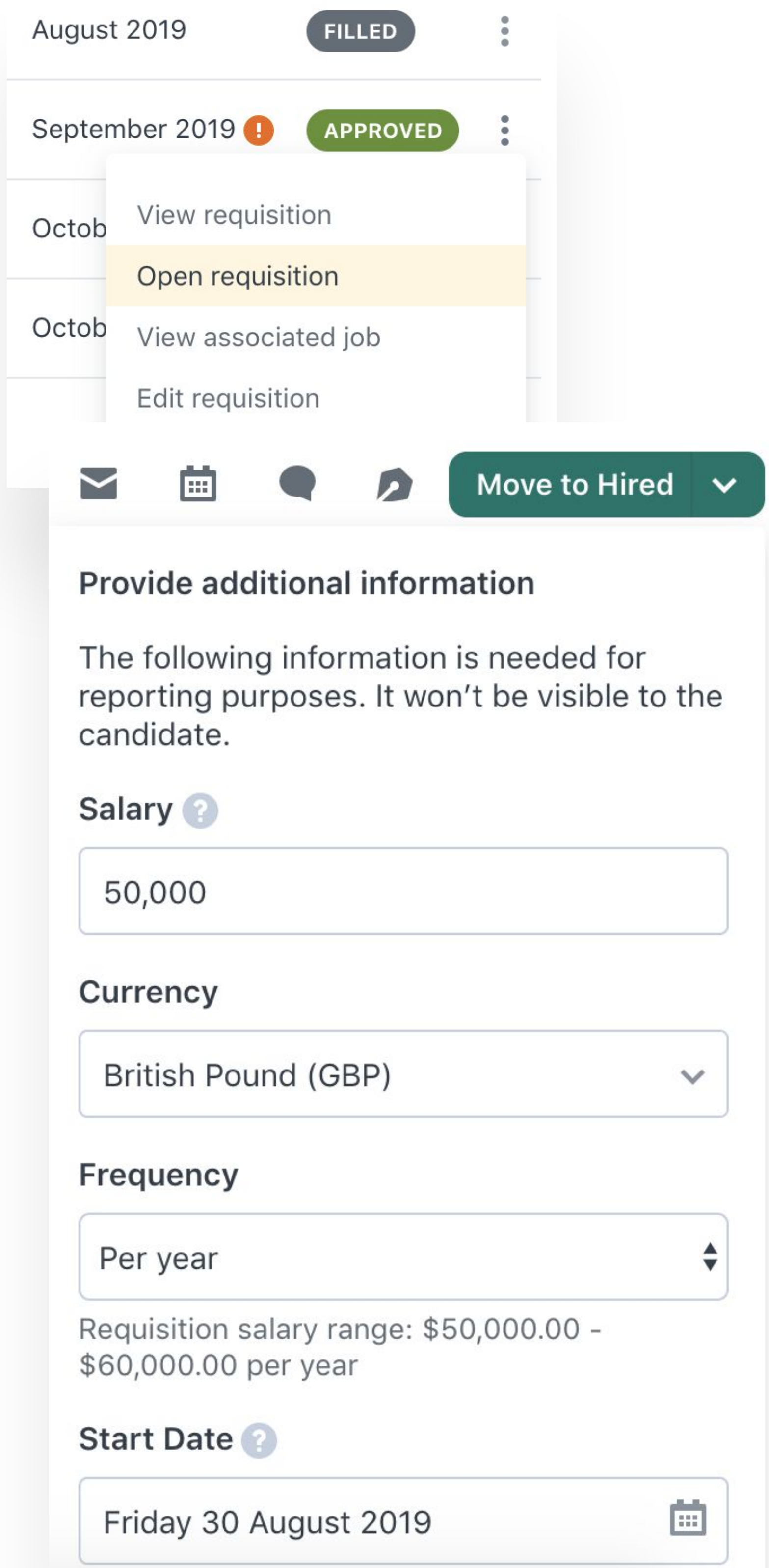
5. Open and fill requisitions

When you start the recruitment process, the requisition needs to be opened. This is so that 'time to fill' can be accurately tracked.

The Requisition Owner should go to the Hiring Plan page and open the requisition by clicking the settings cog. This indicates that recruitment has begun. If you plan to advertise publicly for the job, this is the best time to publish the job as well.

The hiring team should follow the recruiting process as normal, interviewing and assessing candidates.

A requisition is filled when a candidate moves from the ‘Offer’ pipeline stage to ‘Hired’. When updating this status, the user who moves the candidate will be prompted to enter the agreed salary and start date. This data feeds back into your reporting page.



6. Report and plan

Reporting on past and present plans makes it easier to plan and action future strategy. Sharing data also promotes better engagement and strategic support from stakeholders.

Hiring Plan

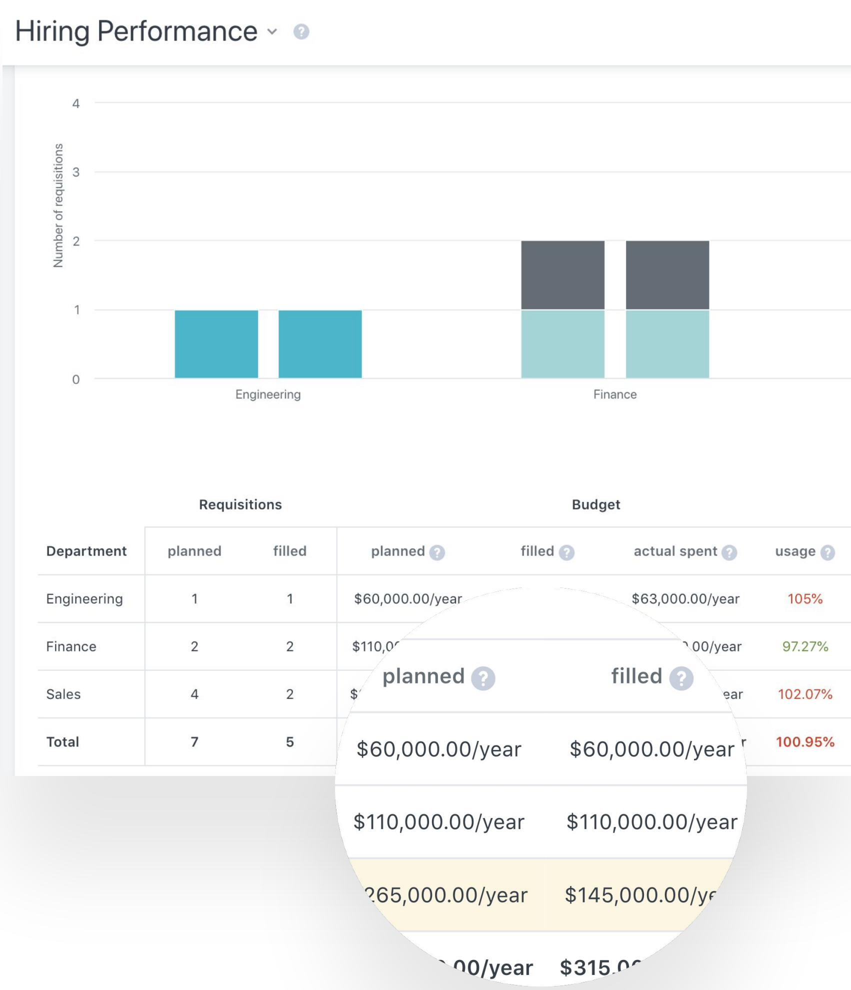
The Hiring Plan report shows the planned and used budget for your requisitions. It also calculates average time to fill a requisition (the time from when the req is opened to when a candidate is hired).

Use this report for budget forecasting.

Hiring Performance

The Hiring Performance report shows key budgeting details by department and calculates the average time for candidates to start.

Use this report for tracking budget and hiring goals.



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