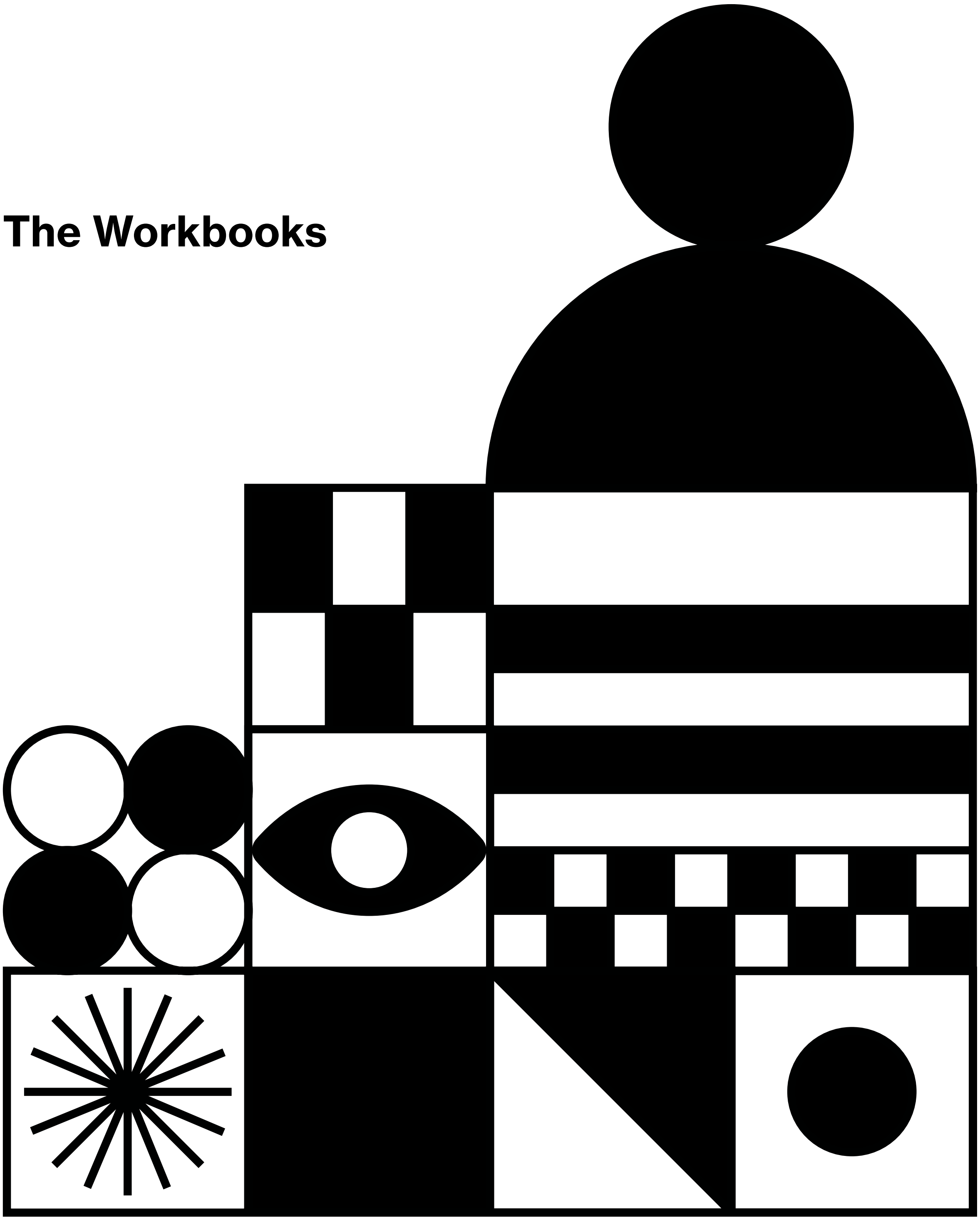
SCALING PEOPLE

Tactics for Management and Company Building

The Workbooks



Claire Hughes Johnson

Scaling People: The Workbooks

Chapter 1

Management Prerequisites Checklist

- **You are aware of your legal responsibilities as a manager in the jurisdiction in which you operate.**
- **You and individual reports:**
  - Hold regular 1:1s on a weekly or biweekly cadence, and they are rarely rescheduled.
  - Create agendas for your 1:1s that include contributions from both sides, notes, and agreed-upon actions.
  - Have quarterly goals that you track together.
  - Hold bidirectional feedback sessions with your reports every three to six months.
  - Hold more formal performance conversations every 3, 6, or 12 months (the more rapidly your company is changing, the more often these should occur) that emphasize both the results the person achieved (or didn't) and *how* the person did or did not achieve those results.
- **You and your teams:**
  - Hold weekly or biweekly meetings.
  - Show up on time for meetings and avoid rescheduling them.
  - Benefit from time together, whether aligning on plans, making decisions, or workshopping challenges to aid one another in getting the work done.
- **You and your division:**
  - Have job descriptions and an interview rubric for the roles you're hiring for.
  - Have job ladders and levels that are clearly communicated with employees.
  - Have a compensation philosophy and a clear framework for compensation that employees understand.
- **You:**
  - Understand your own job description and the function of your team.
  - Have quarterly goals that you've agreed on with your own manager.
  - Have 1:1s on a regular cadence with your own manager.
  - Can access information from your manager or leaders in your organization that provides regular context on overall company priorities and goals.

Understand Your Values

Adapted from an exercise by Stan Slap.

Here's an exercise I recommend for uncovering your values and understanding how they affect your work. This exercise is tailored to the application of your values at work, but it can apply to your personal life too.

1. Imagine yourself at 80 years old, reflecting on your career. Ask yourself: What in my work life gave me a sense of fulfillment and meaning?
2. Write down the 10 core values that are represented in your imagining of your fulfilled life (e.g., excellence, joy, balance, community, impact, learning). Check out the list of values on page 53 for examples.
3. Narrow the list down to five values.
4. Now, narrow the list down to three. If you're working with a group, discuss your three values and why you chose them.
5. Next to each value, write down the activities that give you a sense that you're working in accord with that value. For example, if your value is excellence, maybe the activity is that you never deliver a product unless you feel it is 95 percent complete.
6. Reflect on the positive outcomes of those values, then reflect on the trade-offs. For example, a positive expression of valuing excellence is that you deliver high-quality work. A trade-off is that you often miss deadlines or have trouble sacrificing quality, even when a specific situation warrants it.

Notes

Example values

Here's a small sampling of the values Stan Slap lists in ***Bury My Heart at Conference Room B***. I recommend checking out the book for the full list of 50 values.

MY VALUE	ONE DEFINITION
Accomplishment	Succeeding in reaching your goals
Advancement	Progress, promotion, improvement
Adventure	Taking risks, new experiences
Affection	Love, deep friendship
Altruism	Helping those who cannot help themselves
Balance	Calm, moderation, perspective
Commitment	Dedication to cause, satisfaction in obligation
Compassion	Empathy, tolerance, and understanding of others

Notes

You can do this exercise as a team, sharing your three key values in small groups. Individuals can then share their stories with a larger group. I've found this to be a helpful starting point for a conversation about what matters to you and how those values manifest at work. It can also be helpful to home in on three values you all share as a team, which can then become your mission.

	VALUE	WORK ACTIVITIES	POSITIVE OUTCOMES	TRADE-OFFS
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

Self-Awareness Exercises

Articulate your values

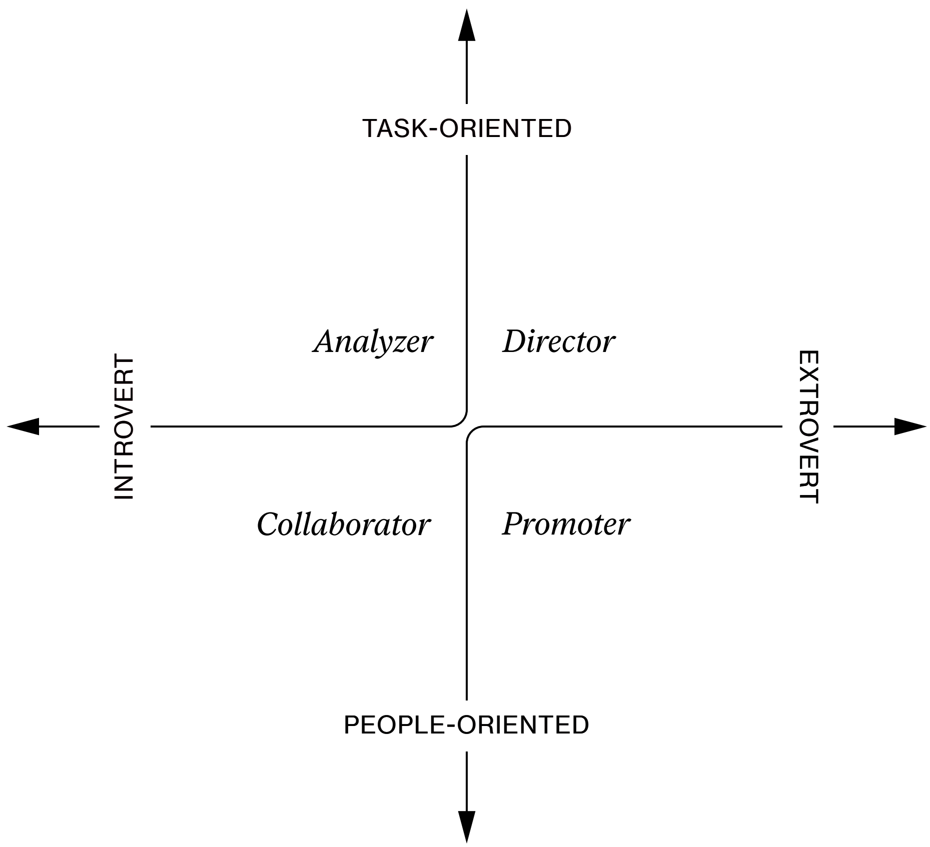
Use the following framework to map out your personal values. (You can find a few example values on the previous page.)

PERSONAL VALUE	WHY	EXAMPLE STORY
Name this value. ***Example:*** *Impact*	**Explain why this value matters to you.** ***Example:*** *I am not motivated unless I believe my work matters, both immediately and in the big picture. My parents raised me to care about the world around me.*	**Share an example of how this value appears in your life.** ***Example:*** *I decided not to attend law school when I realized that the business leaders I met had more impact and influence on economic well-being and policy.*

	PERSONAL VALUE	WHY	EXAMPLE STORY
1.			
2.			
3.			

Consider your work style preferences

Place yourself within this grid, keeping in mind the different work style types outlined on page 32. Is there a different placement for your “at-home” preferences versus your work preferences?



Identify your strengths

To more deeply understand your skills and capabilities, as well as any you may need to develop, start by listing your strengths: the things you're best at. Then, break them down into innate and acquired skills and capabilities (using the section on innate versus acquired skills and capabilities on page 34 as a guide).

STRENGTH	
Example: *Communication*	
SKILLS	
Innate	**Acquired**
Example: *Listening well and speaking clearly; fast writer*	***Example***: *Public speaking; speech and memo writing*
CAPABILITIES	
Innate	**Acquired**
Example: *Rapid information processing and analytical abilities*	***Example:*** *Ability to synthesize and summarize complex information in a simple way for broad distribution (e.g., marketing)*

Chapter 2

Stripe's Operating Principles

These were Stripe's operating principles as of December 2021:

How we work

Users first
We have a weighty obligation to the businesses built on Stripe and the everyday people they serve. Because we're so critical to our users' success, we must keep their needs front and center in all we do.

Move with urgency and focus
A bias for action speeds our learning and delights our users. Focus on what matters most, make fast initial progress, and iterate toward the best outcome.

Be meticulous in your craft
Doing things well is in Stripe's DNA. We value craftsmanship for its own sake and are fervently committed to producing surprisingly great work.

Seek feedback
We value intellectual honesty and look for other Stripes with the expertise to refine our ideas, challenge us, and deepen our understanding across the business.

Deliver outstanding results
Stripes are high achievers with a drive to succeed. We take end-to-end accountability for seeing our work through and delivering on our commitments.

Notes

Who we are

Curious
We lead with a genuine interest in people, ideas, and the unknown. We work hard to understand other points of view and prefer investigating to being right.

Resilient
Startups are tumultuous places, and the audacity of our goals will mean occasional failure. We view setbacks as opportunities to sharpen our skills.

Humble
Stripes are humble, not arrogant or complacent, and create an inclusive environment for all. We aren't wedded to how we currently do things – lots about our current practices will turn out to be wrong.

Macro-optimistic
Stripes reject cynicism, knowing that all problems can be solved with the right understanding and that progress is only inevitable through focused effort. We are believers in the long term.

Exothermic
Stripes generate an energy and warmth that is infectious across teams and throughout the company. We are genuinely excited about our work and about creating an exceptionally welcoming environment for all Stripes.

Notes

And leaders

Obsess over talent
The quality of the Stripes you attract and retain defines your team, so developing a keen talent radar can be your biggest competitive advantage. Be the person who reads and investigates every candidate packet. Push back when you sense that managers are making hires who are merely fine. Hold an equally high bar for performance! Create a culture of quickly addressing mishires, developing critical talent, and finding challenging work for your strongest performers.

Elevate ambitions
Know where your team is headed next year, in 4 years, and in 10 years, and develop a compelling vision for that future. Guide your team to redefine what's possible by expanding what's reasonable.

Set the pace and energy
Stripe is intense – we have broad ambitions and serious obligations to our users. Sign your team up for bold goals, articulate a plan to achieve them faster than expected, and focus on making this energizing, rewarding, and fulfilling for your teams.

Make decisions; be accountable
It's not always clear who should make a decision. Effective leaders embrace decision-making in cases of murky ownership, either making the call themselves or collaborating across the necessary teams to drive an outcome. They clearly communicate decisions and hold themselves and their teams accountable for results.

Lead with clarity and context
Translate chaos into a clear, compelling plan. Be deeply informed about what's happening across Stripe and create your team's plans in reference to the broader work.

Solve problems
Be a persistent force for progress. Our leaders must work with their teams and across Stripe to quickly and effectively solve problems – especially when they're hard.

Finally, while we continue to evolve, some of the guideposts we used to get here remain helpful. Though these aren't the focus of our core operating principles, we encourage you to also consider your work in reference to some of these "classic" Stripe slogans:

- We haven't won yet.
- Efficiency is leverage.
- Be meticulous about the foundations.
- Disagree and commit.
- Really, really, really care.
- Operate from first principles.
- Be politely relentless.

Team Charter

Mission

Example:

> Provide best-in-class security to all of our users and their accounts on the dashboard. This encompasses both authentication and authorization, including dashboard roles and permissioning.

Notes

Vision

Example:

> We aim to build strong trust internally and externally in our ability to provide best-in-class security for all of our users, from enterprises to small users, while avoiding overhead for our users and support team. Account takeovers will no longer be an active problem (neither as a terrible user experience nor as a financial loss). While we won't ever be able to get them to zero, we and our customers should have full faith that when they occur (e.g., through an internal bad actor on the customer side), we did everything within creative reasonability to prevent them. We will also deliver "table-stakes" security features such that we fly through user security–related discussions with new enterprise customers.

Notes

Customers

Example:

- We're responsible for the account security of every user and account, ensuring that their accounts and the sensitive data therein remain theirs alone.
- We protect the interests of all merchant accounts by enabling them to control who in their business can access what, and by protecting them from rogue actions.

Notes

Metrics

Example:

Number of accounts that have experienced a takeover in a given month

- Measuring: User experience, risk of unhappy customer leak, support burden
- Target value: [X]

Account takeover losses

- Measuring: Direct financial loss and loss of margin due to account security issues
- Target value: [X]

Percentage of all dashboard users who have adopted two-factor authentication

- Measuring: Protection of entire user base from account takeovers
- Target value: [X]

Notes

Strategic importance

Example:

> Aside from the financial benefits of reducing losses, having better account security will improve the user experience and build user trust. Strong foundations here will help prevent attacks, bad user experiences, and losses, since we will become a target if we are not world-class. A strong track record will also increase the appeal of our products to enterprise users, open up new sales conversations, and accelerate existing ones.

Notes

Major risks

Example:

- Team gets pulled into lower-priority work by audit or compliance activities
- Major security breach
- Major new attack vectors
- Death by a thousand cuts of one-off enterprise requests
- Tech debt

Notes

Provided interfaces

Example:

- Login code
- 2FA infrastructure
- Session infrastructure
- Login/email challenge
- Dashboard auditing models
- Account recovery/password reset flow

Notes

Dependent interfaces

Example:

- User registration UI
- Verificator (interface for SMS 2FA)
- User email system and team

Notes

Organizational Foundations

To test whether you have a clear operating system, fill out the table below. How easily can you complete it for an individual report on your team, for one of your teams, and for your division? Is this information documented anywhere in your division, and is it easy to find? If you're having trouble filling out this template, imagine how your teams and reports must feel!

	INDIVIDUAL	TEAM	DIVISION
Mission			
Objectives with owner (DRI)			
Key metrics			
Accountability mechanisms			
Operating cadence			

This information should be documented and easily accessible on your team's and division's internal homepages. On those same pages or at the top of your internal dashboard, if separate, be sure to include similar detail about your top objectives and metrics with targets for the year. (See the next template.)

Objectives and Metrics Checklist

It's worthwhile to scrutinize any documented objective for clarity and alignment with the team's or division's mission and plan to contribute to company success. You can use the following template to do so.

OBJECTIVE	METRIC	BASELINE	TARGET

Objectives and Metrics Checklist (Continued…)

Are your objectives:

- ☐ Inspirational?
- ☐ Actionable by your team?
- ☐ Related to your team's mission and vision?
- ☐ Related to the company's priorities and goals?

Are the objectives SMART?

- ☐ Specific
- ☐ Measurable
- ☐ Achievable
- ☐ Results-oriented
- ☐ Targeted

Also check:

- ☐ Is the metric a leading indicator?
- ☐ Does it have counterweight metrics? (For example, you could increase the number of users by giving away the product for free, but you don't want to do that! So if you have a user metric, what is your counterweight revenue metric?)
- ☐ Is there a framework to evaluate the metric (e.g., a calculation or a query)?
- ☐ Does the metric have an owner?
- ☐ Is the metric relative, not absolute? (For example, instead of "Increase the number of users by 1,000," explain the relative growth: "Increase the number of users by 20 percent, from 5,000 to 6,000.")
- ☐ Does it take into account your existing user growth? (For example, you might be able to hit your revenue target just through growth from existing users, but then you haven't done anything to earn that growth.)

Writing Good OKRs

This guide was written by Stripes on our finance and tech enablement teams in collaboration with our CTO, David Singleton.

The basics

Write: Note the top-level 3–5 objectives, with 1–5 key results per objective, that you're committed to accomplishing in the quarter. Identify which are must-hit goals. (See the next section for guidance.)

Collaborate: If you partner closely with other functions or teams, get feedback and make sure you agree on the OKRs you've set.

Publish: When you're done, change "Draft" to "On track" in the document title to signal that your OKRs are published (on the company intranet or other document-sharing method) and in progress.

Guidance on ambition

Most goals should be ambitious yet attainable. This means we expect to achieve the vast majority of them over time, while also recognizing that some will be a stretch. Overall, we should expect to score in the 70–80 percent range over the quarter.

A small number of our goals (20–30 percent for any given team in a quarter) might be hard commitments. These should be marked as "must-hit," and we expect to reach 95 percent attainment or more. If these goals are trending behind, we expect to sacrifice other goals in service of hitting them.

Good OKRs start with good objectives

Best practices for good objectives

- Objectives are clearly defined goals that answer the question "Where do I want to go?"
- Objectives should be an outcome – a description of the state of the world at the end of the quarter. They should focus on the user problem you're solving.
- Objectives should be focused on the most important work. There should be no more than 3–5 of them.
- Objectives chart intent and direction – they chart outcomes.
- Objectives are long-term and often span several quarters, even years.
- Objectives nest up and down to some degree in an organization.
- Objectives should be ambitious and can be open to (some) interpretation and debate.
- Objectives can be aspirational (70 percent) or committed (100 percent). Identify which are which!
- All objectives should matter. The best objectives are inspirational.
- Objectives can be shared across teams.

Define key results

Best practices for good key results

- Key results are concrete definitions of success. Each one determines whether the objective has been achieved or not and answers the question “How will I pace myself to see if I’m on track?”
- Key results should list outcomes, not activities. There should be 1–5 key results per objective.
- Key results are measurable and binary: Either they did or didn’t happen. They’re not open to interpretation.
- Key results flow from a theory of a plausible causal mechanism that connects the key result with the objective and with your own work.
- Key results build a shared model of reality across teams and organizations.
- Key results should compound over time, if possible.

Common pitfalls when formulating OKRs

- Using an activity or action as an outcome.
- Having a key result that can’t be measured in some way.
- Turning a roadmap directly into objectives and key results.
- Writing more than 3–5 objectives, or 1–5 key results per objective.

Notes

Notes

Iterating and Scoring

Mid-quarter scoring

At some point in the quarter, the team should get together to discuss progress to date and give it an approximate score. The easiest way to do this is a simple **green**, **yellow**, and **red** rubric accompanied by an assessment of **on track**, **off track**, or **at risk**. (If your team prefers to use percentage-based scoring, do what works best.) Items that are off track or at risk should be discussed further so that the team can find ways to redirect their energy and build in time to recover.

How to handle changes in information and priorities

If new information arises that changes an objective or key result, there should be some common practices to track and handle the changes. This could mean scoring an OKR lower or swapping it out. Do whatever makes sense for the team, but be consistent and clear. Most importantly, communicate changes to any impacted teams, and clearly document what's changed and why.

Here's some general guidance:

- If you add or drop a key result, document the decision and notify impacted teams.
- If you add an objective (e.g., due to an urgent shift in the world), document whether it resulted in deprioritizing existing work and, if so, what work was deprioritized.
- Dropping an objective should be rare. This may happen due to a change in constraints or because it truly isn't providing value to users. In these cases, it's best to stop working on it and keep it in the OKRs for scoring and discussion.

Notes

Quarterly Business Reviews (QBRs)

These QBR documents were written by Kailey Stockenbojer on the Stripe finance team in consultation with various Stripe leaders, including me.

QBR guidelines

What statements should be true after your QBR meeting

- The QBR provided clear charter (long-term) and operating (short-term) metrics, with quarterly targets looking out through the end of the year. Ask yourself: Where do we want to be in two years, and are we on track? What has to go right for us to get there? Use the metrics to comment on your trajectory.
- The QBR explained which goals we executed upon, which ones we did not, why, and how we can work together to close any gaps and get to where we planned to be (or, if plans are changing, why they're changing).
- The QBR explained how much we're investing relative to what the area is producing. Based on the results we're seeing, participants can make decisions on how much should be invested.
- Participants left with clear mutual expectations of what will be accomplished in the coming periods.
- We know what potential obstacles may come up through the end of the year.
- Leadership understands what you need to accelerate and produce outstanding results.

Delivering a stellar QBR

- **Focus on results**: We already had a plan, we took a specific action, and we can see specifically (with metrics) how execution is progressing, rather than having a winding discussion about potential plans.
- **Be candid**: The core audience is leadership. They want a candid assessment of what your team has accomplished, what it needs to do better at, and what it plans to do.
- **Be concise**: This is a six-page narrative, plus an appendix with tables and/or charts.
- **Prepare in advance**: Share the memo at least 24 hours in advance. We will also allow reading time in the meeting – the meeting will be a discussion informed by your memo.
- **Be present**: Those who join should be present in the discussion and minimize work distractions. (We recommend snoozing Slack notifications and minimizing other windows.) Even though we will consume materials digitally, we advise against linking out to supplementary materials.

Prepare for the QBR meeting

- Provide a link to your QBR document in the calendar and leadership guidebook at least 24 hours in advance of the meeting.
- If you have confidential topics to cover, add them in a separate document, set sharing settings to restricted, and add the link to the guidebook. Provide document access to your QBR attendees.
- Email the discussion materials directly to your attendees.
- Prepare an agenda of key topics you want to cover with leadership.

During the QBR meeting

- Allow time for pre-reads and announce the conclusion of pre-read time.
- Gather top-of-mind questions and topics from attendees and add them to the agenda you prepared prior to the meeting.
- If necessary, prioritize the topics to make sure you cover the most important ones first in the allotted time.
- Include metrics as a standard discussion topic.
- The QBR leader should drive the discussion based on the key topics on the agenda.
- Take comprehensive notes or arrange for someone attending the meeting to take notes. This should include action items and owners.

After the QBR meeting

- Share the notes with all QBR participants.
- Add your action items to our QBR action item tracker.
- Reflect on the quality of the QBR, including the quality of the metrics. Gather feedback from partners and leadership if it was not readily provided. What do you need to work on to have a more effective QBR? What will you change for next time?

Notes

QBR outline

Note: The suggested word count and page limits are directional, to help you stay within the six-page limit. If your content exceeds the six-page limit, the QBR leader should determine which section(s) to shorten at their discretion.

Executive summary (250 words or less)

What do you want leadership to know about your performance and strategic direction? This should be a candid assessment, not a summary of your successes.

Narrative (two pages maximum)

Write up to two pages on your team's quarterly performance and strategic direction. The narrative should speak for itself, and the "voiceover" should simply be used to focus the discussion. Your narrative should be grounded in your charter and operating metrics, including your discussion of performance against goals.

Your discussion of results should be candid. Appropriately balance your discussion based on your relative performance against your goals. If you missed your goals, the discussion should be skewed toward lowlights. (Why didn't you deliver?) If you met your goals, you should still discuss any areas that did not go well.

The narrative should discuss your quarterly results, your outlook for the remainder of the year, and longer-term strategic considerations. It's up to the leader to determine how to balance the discussion, but generally most teams should spend at least 50 percent of their discussion on strategy and outlook.

We recommend that you embed relevant visualizations of metrics in your narrative where helpful to the reader. All metrics not included in your narrative should be included in the metrics performance section of your QBR.

Notes

Example outline

We recognize that it can be useful to have examples of outlines that have helped other teams have effective discussions. You own the QBR – we encourage you to structure the narrative to best describe your team's performance and trajectory, and to only use the outline if useful.

1. **Current quarter reflection**: Explain your performance against your goals.
    - 1.1 Support your performance against goals with operating and charter metrics.
        - 1.1.1 How were metrics impacted, and how did they change over time?
        - 1.1.2 What did you do (or not do) to influence them?
    - 1.2 Discuss key ships. If you missed key ships, why?
    - 1.3 Discuss user feedback.
        - 1.3.1 Document top user asks and how well you are addressing them.
        - 1.3.2 Document user compliments in areas where you are performing well.
    - 1.4 Discuss overall velocity.
2. **Outlook**: Look forward to the next quarter and the next year.
    - 2.1 What are your top three goals in order of priority?
        - 2.1.1 Which metrics will your goals impact?
        - 2.1.2 How will user stories and pain points be impacted?
        - 2.1.3 Are you on track to meet these goals? If not, why?
    - 2.2 What keeps you up at night? (Read: What should leadership be worried about?)
3. **Other sections**: Use at your discretion, based on what is relevant for your team.
    - 3.1 Cross-functional asks.
    - 3.2 Hiring progress.
    - 3.3 Team morale.

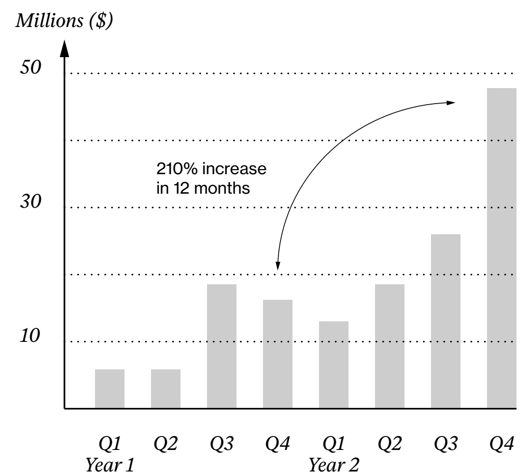
Metrics performance (two pages maximum – if you have additional metrics, please put them in the appendix)

For the most part, your metrics discussion should happen in your narrative. Use this section to briefly describe changes to the metrics you use to measure your performance (changes since last QBR or anticipated changes). Include graphs. Your metrics should cover a roughly two-year time horizon (where available), not just the current period.

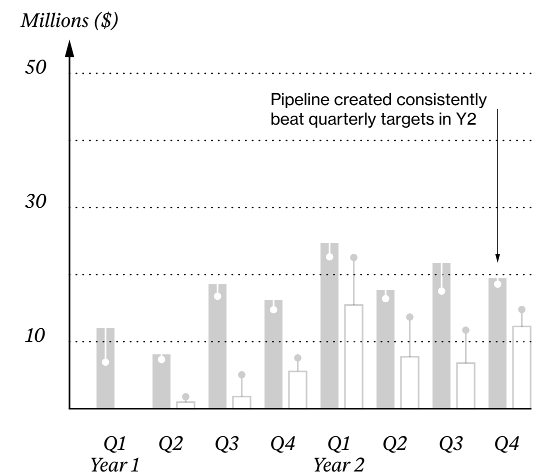
If you revised your metrics during planning, your charts (and/or commentary) should include both the original and revised target, where applicable.

Examples of key metrics

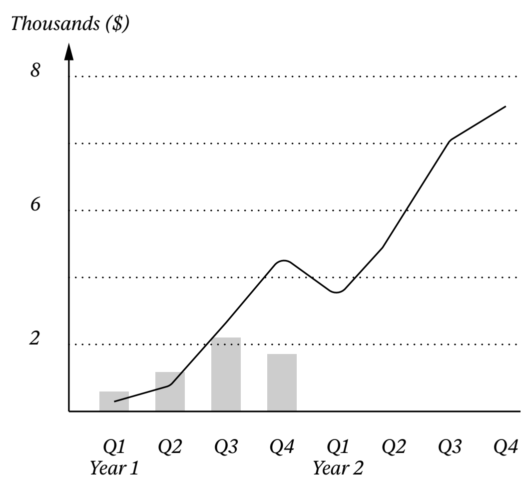
Year-over-year revenue



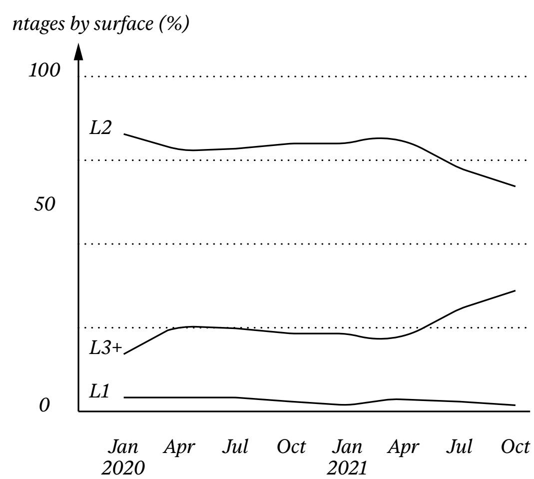
Pipeline created and deals signed



Volume: Actuals vs. budget



Unified web go-lives



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Product P&L

Product teams: In addition to your metrics, please work with finance to include your product P&L as a table in this section.

Cross-functional focus areas

In addition to your core performance and metrics, we've defined a set of focus areas that are important to the company and require engagement from business leaders to make progress on our company objectives. Please add comments on your assessment scores (e.g., what you're doing to improve the score) and include a screenshot of the output below. Reach out to the focus area DRI with questions on the assessments.

Progress on goals (one page maximum – if you wish to share additional goals, please put them in the appendix)

Select your top 5–10 goals and summarize them in the table on the next page. There is a strict one-page limit.

FOCUS AREA	DRI	QX SCORE	QY SCORE	COMMENTS
Reliability				
Security				
Efficiency				
Operations				
Product quality				

TEAM OBJECTIVE	SHIPPED	ON TRACK	OFF TRACK	AT RISK	TOTAL
Objective 1					
Objective 2					
Objective 3					
Objective 4					
Objective 5					
Total					
% of Total					100%

TEAM OBJECTIVE	GOAL	DUE DATE	GOAL STATE	QX SCORE	COMMENTS
(Optional)	(Ship and/or metric to move)				

Appendix A: Required tables

Prior QBR action items

Address the action items from your prior QBR and provide a status update on any action items you have not yet addressed.

ACTION ITEM	FOLLOW-UP STATUS/NARRATIVE	OWNER

Operating expenses (for non-product teams)

If you have not included a product P&L, your finance partner can share your operating expenses budget versus actuals to include here. Product teams can optionally include this as additional detail.

Headcount

Provide your headcount by sub-team based on how your team is organized.

SUB-TEAM				
DESCRIPTION				
CURRENT HEAD-COUNT	CURRENT ANS	YTD NET CHANGE	YEAR ENVELOPE	ROY NET HIRE CAPACITY
TOTAL HEADCOUNT				

Top asks from users

We co-create our products with our users, internal and external. What are their highest priorities? The status should be **committed**, **partially committed**, or **not committed**.

USER ASK	USER SEGMENT	STATUS	COMMENTS

Appendix B: Additional supporting materials

Use this section at your discretion to include additional supporting materials and links. Examples might include top recent ships, top upcoming ships, additional goals, etc.

Notes

Chapter 3

Interview Framework and Rubric: Recruiting for Recruiters (L2+)

Competencies being assessed:

- Collaboration
- Conscientiousness
- Willingness to be wrong
- Intrinsic motivation
- Structured thinking
- Resilience
- Accountability

Interview process:

- Recruiter screen
- Team screen and written project (run in tandem)
- Onsite interviews
  - Collaboration and conscientiousness: 45 minutes
  - Willingness to be wrong and intrinsic motivation: 45 minutes
  - Structured thinking (hiring manager roleplay): 45 minutes
- Resilience and accountability: 45 minutes

Notes

Recruiter screen

Competencies being assessed:

- Functional expertise
- Conscientiousness
- Intrinsic motivation

Who can do this interview (including backup):

- Recruiter

Interview length: 30 minutes

Background

Example talk track:

I'd love to hear a bit more about your background in recruiting. I'll have a few questions along the way, but I figure we could start there.

- What parts of the recruiting life cycle have you been involved with? (If not the full life cycle, are you open to it?)
- What has your volume looked like? What are your other responsibilities? (How do you prioritize?)
- How do you interact with the business? How do you approach the hiring manager relationship? (What's your partnership like with the business? How established was the process? Did you have to go in and create order from chaos?)
- What does success look like in your current role? How are you measured?
- Optional: How do you assess candidates for fit in the role you're hiring for, beyond the functional skill set?
- Optional: What's one thing you'd change about your current recruiting process? How would you go about implementing those changes?

Additional questions (if there's time):

- Is there a project or process improvement you're most proud of that you led recently?
- What has been an ambiguous, tough challenge at work, and how did you navigate it?

Notes

Rubric		
Poor	**Good**	**Strong**
		Good answers, plus:
Life cycle: No recent (3+ years) in-house closing experience; no desire to source as part of role.	**Life cycle:** Ideally full life cycle (FLC), or candidate is at least open to FLC; has touched both closing and sourcing in their career.	**Life cycle:** Has most recently (1+ years) been FLC.
Volume: Proud of high volume and wants to continue in that space.	**Volume:** Able to articulate current volumes, speaks to numbers, and has a bias for quality over high volume.	**Volume:** Aligns with our norm (4–6 unique searches, 7-ish hires per quarter).
Business partnership: Lack of ownership or desire to consult with the business; transactional approach to partnership.	**Business partnership:** Consultative approach, high degree of ownership, views relationship as a partnership instead of transactional.	**Business partnership:** Articulates specific examples of their partnership with the business and the importance of building or leveraging those relationships.
Success: Declines to mention metrics, expresses desire not to be measured, or focuses just on the numbers or delivery instead of the how.	**Success:** Speaks to their metrics or storytelling through data; if candidate has light exposure to data, expresses desire to dive deeper or has set up measures for themselves.	**Success:** Provides specific examples of influencing the business or process through data and evidence.
Builder mindset: Operates comfortably within the status quo; fails to express a desire or need for change.	**Builder mindset:** Highlights areas of process improvement or building they've owned or heavily influenced.	**Builder mindset:** Evidence of building aligns with similar challenges we face (scale, consistency, etc.).
Communication: Unstructured, overlong, does not pick up on interviewer cues.	**Communication:** Clear, succinct, asks clarifying questions.	**Communication:** Engaging; frames answers to add value and opinions while keeping structure and clarity.

Notes

Team screen
(run in tandem with written project)

Competencies being assessed:

- Accountability
- Structured thinking

Who can do this interview (including backup):

- List relevant team members or positions

Interview length: 45 minutes

- 35–45 minutes for questions
- 5–10 for candidate to ask questions
- Ask follow-up and probing questions if you don't get a satisfactory level of depth in the first answer. If the candidate can provide more depth after prompting, this qualifies as passing the question.

Notes

Question 1:

Acknowledging that every role and candidate is different, how do you pitch your current company against competition when closing candidates?

Follow-up questions:

- If the candidate focuses only on cultural aspects: How do you represent the financial component of the offer?
- Does your pitch change when competing against a large or small company? How and why?

RUBRIC			
POOR	**WEAK**	**GOOD**	**STRONG**
Does not discuss value proposition at all.	Unable to describe the opportunity for their company for the space they're in.	Knows the company's growth and opportunity well (but doesn't know the space well) and can explain it in relation to competitors.	Deep understanding of the value proposition of their company and how to pitch it in relation to competitors.
Doesn't close candidates; relies entirely on a script or manager to close.	Hard selling on strengths; unwilling or unable to acknowledge weaker points or areas where the company is focused on improving.	Only talks about the positives; doesn't talk about how the candidate could impact company trajectory.	Honest and forthright about strengths and weaknesses of company value proposition; able to honestly discuss upside and risk; connects a candidate's role to company success.
	Unable to identify whether requests are unreasonable or provide alternative approaches.		Able to push back on unreasonable asks from candidates; understands that different companies have different value propositions; can steer candidates away from apples-to-apples comparisons.

Question 2:

What was your toughest recent search? Why was it so challenging, and how did you pivot and adapt along the way?

Follow-up questions:

- What did you learn from that search?
- How did you partner with your hiring managers to navigate this search? What did you own? What did they own?
- How have you applied your learnings to future situations?
- If the candidate isn't specific or keeps it high-level: Were there any specific, tactical changes you had to make? What were they, and what were the results?
- What, specifically, made this search harder than other searches? Were there any stakeholders you had to involve and get buy-in from to adapt to these changes? If so, how did you go about doing that?

RUBRIC			
POOR	**WEAK**	**GOOD**	**STRONG**
Unable to give an example of a tough search or challenges they faced.	Unclear why the search was difficult; they didn't make adjustments, or their suggestions were blocked; instead of adjusting, they continued with an approach that had not been successful.	Clearly identifies why the search was challenging and how they attempted to adjust their approach to solve for those challenges.	Demonstrates a sophisticated, structured recruiting process; able to creatively influence and reach decision-makers; independently drives changes in approach that yield results (like a successful hire).
Lacks creativity to design new solutions; adaptation was driven by management or stakeholder decisions.	Unable to reflect on challenges or suggestions made to unblock for current or future situations.	Able to reflect on past challenges and why changes were necessary; gathers buy-in and partners well with other team members to unblock or pivot in strategy.	Able to go very deep into the details (shows that they did the work instead of escalating to a hiring manager or manager) and think critically throughout; strategically consults other team members, hiring manager, manager, stakeholders, etc. on changes in process, and can communicate changes effectively.

Question 3:

How do you ensure that you have diverse candidate representation in your pipeline?

Follow-up questions:

- Are there any tools or strategies you use to expand your search or candidate pool?
- What tactics have you used that have worked best? What tactics have been less successful?
- When do you typically approach the topic of diversity, equity, and inclusion with your hiring partners? How do you do this?

RUBRIC			
POOR	**WEAK**	**GOOD**	**STRONG**
Does not have a defined approach for how they ensure diverse candidate representation, or relies on others in the organization to do this.	Understands the importance of talent branding and sourcing tactics but is unable to go into detail on methods they've used or challenges they've overcome.	Able to identify several sourcing and talent branding tactics they've used to build diverse pipelines and discuss their relative merits or challenges.	Defines what "diversity" means at a role and team level, as well as at a company level.
Unable to explain tactics or approaches used to ensure there is diverse representation in their pipeline.	Lists some tactics to expand the top-of-funnel pipeline for diverse candidate representation, but is unable to expand on approaches or their importance.	Demonstrates thoughtfulness and interest in researching and pursuing multiple approaches.	Thinks about market intel and mapping and is able to speak to approaches, data, tools, etc. they've used in the past.
No accountability in approaching the topic of diversity, equity, and inclusion with their hiring partners or peers.	Does not typically approach the topic of diversity, equity, and inclusion or diversifying pipelines with hiring partners; in specific situations where they've had to do this, they have relied heavily on their manager or other stakeholders to do so.	Understands the importance of diverse representation across the company; has many internal stakeholders involved, and takes action to approach the topic of diversity, equity, and inclusion with hiring partners when necessary.	Takes action to educate their hiring teams and partners and can give clear examples of this.
			Creates inclusive job descriptions and interview criteria.

Written project
(run in tandem with team screen)

Competency being assessed:

- Written communication skills

Who can evaluate the written project:

- Recruiter and/or hiring manager, in advance of onsite

Project timeline:

- Candidates are usually given 2–3 days to submit

Context:

Request two writing samples (one internal communication and one external communication). Ideally, these are preexisting documents. However, a candidate can create something if they're no longer employed and don't have access to their company email.

- **Internal communication**: This can be a weekly or monthly update to hiring managers, a project update to stakeholders, or a shipped email. The candidate is required to remove confidential information such as names and data.
- **External communication**: Generally, this is a message to candidates. The preferred sample is interview preparation material. However, we're open to event invitations, candidate outreach, etc. We do not want to receive a template used by their team, such as a rejection email or interview availability request.

Notes

Prompt (sent via applicant tracking system)

Hi [Candidate First Name],

Thank you so much for taking the time to chat with [Team Screener] earlier! They enjoyed your conversation, and we are excited to move you forward in the process for the [Job Name] role, which includes a written project.

Since so much of what we do as recruiters is based around written work, I'd like to ask you to send along samples from each of the following categories:

- External communication to a candidate: The preferred sample is interview preparation material. However, we're open to event invitations, candidate outreach, or some other personalized candidate communication. We're not looking for templates used by your team (i.e., candidate rejection emails or interview availability requests) but rather an individual, detailed, and informative email.
- Internal communication to a hiring manager, hiring team, or stakeholders: This email can include a hiring kickoff meeting, candidate positioning, a project update (a sourcing session, an event, or another initiative would work well here), or a shipped email. Please redact confidential information such as names, contact info, and data.

We ask that this be completed within three business days, but please let me know if you need additional time. I'm happy to address questions as you have them, and please submit your work at the link below.

Thanks,

[My First Name]

RUBRIC			
AREA	**1**	**2**	**3**
STRUCTURE	Lacks concision; is confusing; does not include a call to action or stated objectives and outcomes; shows little to no focus on partnership, strategy, or collaboration; is difficult to follow and understand.	Is concise, with a passable level of detail; states a call to action with at least one objective or outcome; focuses on partnership or results; is easy to read and flows logically.	Is concise yet detailed; has a clear call to action highlighting objectives and successful outcomes in ways relevant to the stated priorities; focuses on partnership, collaboration, scalability, or other measurable results; is easy to read and flows logically.
GRAMMAR AND SYNTAX	Contains enough grammar, spelling, syntax, or punctuation errors to need a rewrite before presenting to a leader or candidate.	Has minor grammar, spelling, syntax, or punctuation errors; is ready to be presented to a leader or candidate with some revisions.	Has minimal to no grammar, spelling, syntax, or punctuation errors; is ready to be presented to a leader or candidate with no revisions.
TONE	Does not attempt to reflect a personable tone; fails to engage the intended audience; lacks personality or borders on unprofessional.	Attempts to reflect the right tone and engage the intended audience; lacks personality or proper tone (which may be a product of their current environment) but remains professional.	Reflects our preferred tone and engages the intended audience; is personable and conversational yet professional.

Grading

Grade the written project against all three categories and total the points to determine next steps.

7–9	Pass
5–6	Second set of eyes needed (recruiter or hiring manager)
3–4	Fail

Onsite interview 1: Collaboration and conscientiousness

Competencies being assessed:

- Collaboration
- Conscientiousness

Who can do this interview (including backup):

- List the relevant interviewing group or team members

Interview length: 45 minutes

Notes

Question 1:

Imagine you're working with another team, and you notice that they have a process that could be improved or operationalized. Have you had an experience like this before? If so, how did you react? If not, how would you react or respond?

Follow-up questions:

Situation:

- Did you let the team know? Did you help implement a change?
- How would you communicate what could be improved with the team?
- How would you respond if the team didn't agree with your suggestions?

Action:

- What would your first step be?
- How would you tackle this kind of scenario?
- What kind of information would you need to address the scenario?
- How would you partner with the team to make relevant changes?

Result:

- How could this situation pave the way for future changes?
- What do you think the key takeaways from this situation should be?
- How would this affect your partnerships with other teams?

RUBRIC		
POOR	**GOOD**	**STRONG**
Opts to do or say nothing about the process, regardless of how it could affect the other team; is able to flag potential issues and process breakdowns to management, but doesn't show initiative working with teams to unblock or make process improvements.	Gathers buy-in and partners well with other team members to unblock; demonstrates limited scope of intervention and assistance to the area of their involvement but is unable to explain the broader team and organizational impact of these changes or think about the future.	Demonstrates efficiency in their partnership with the other team; effectively prioritizes the suggested change within the broader goals of the org and works with the team to implement it; identifies whether the change is local or whether an org-wide adjustment is necessary.
Offers no clear direction on how they made their decision; lacks a data-driven approach.	Mentions the need to use data to inform decisions and shares 1–2 metrics used to measure the success of the change.	Quotes the metrics used to measure the success of the change and suggests future improvements based on the data.
		Exhibits desire to help others, regardless of whether it's a part of their core responsibilities.

Question 2:

How do you keep track of all of your different responsibilities, projects, tasks, etc.?

Follow-up questions:

Situation:

- What are some examples of the different things you're working on and prioritizing?

Action:

- How do you determine how you're going to prioritize?
- How do you communicate your prioritization to stakeholders?

Result:

- In juggling multiple to-dos, what have you learned about prioritization?
- How do you think you can improve your methods of prioritization?

RUBRIC		
POOR	**GOOD**	**STRONG**
Does not consider cross-functional partners; lacks a structured approach to planning and prioritizing work; takes on work items as they arise; shows poor organization and tracking skills.	Has an organized task-management philosophy but is unable to note any ways they might improve their prioritization methods; considers cross-functional partners and how various stakeholders are involved in projects and tasks; demonstrates an ability to execute a project plan on their own.	Prioritizes work in line with org and company priorities and has a structured approach to keeping track of deliverables; has a solid tool set and approach to keeping track of and reporting on work; recognizes areas of self-improvement or provides tangible ways they can continue to develop their process for prioritizing; exhibits an ability to collaborate and work through others; defines various work streams and assigns owners; speaks to how to track progress and help unblock challenges.
Does not have a way to think through the problem systematically.	Shows a structured approach to prioritization, but does not demonstrate the ability to see the big picture when assigning priorities.	Demonstrates a holistic and thorough approach to prioritization and aligns their reasoning with the overall company priorities.

Bonus question (if time allows):

When starting a new role or starting at a new company, how do you set yourself up for success?

Follow-up questions:

Situation:

- What did you do when starting your current position?

Action:

- What are the resources you find most valuable while learning?

Result:

- What was missing from your last experience of joining a company that you now know would help you be more successful in your next role?

RUBRIC		
POOR	**GOOD**	**STRONG**
Methods show little or no autonomy or self-reliance; is dependent on others.	Relies on support structures already in place but demonstrates an ability to self-start and problem-solve.	Displays autonomy, resourcefulness, and self-reliance in their methods.
When providing examples, blames others or process for poor training.	Is proactive about reaching out for support or feedback or to ask questions.	Actively seeks out additional resources that are not included in the materials provided; focuses on finding things that explain not just the what but also the why.
Is unable to provide feedback or examples of how to improve a training process.	Provides positive, thoughtful feedback that is lacking slightly in creativity or is not very actionable.	Provides clear and thoughtful feedback on how to improve their training experience; suggestions have identified clear gaps in the previous process.

Onsite interview 2: Willingness to be wrong and intrinsic motivation

Competencies being assessed:

- Willingness to be wrong
- Intrinsic motivation

Who can do this interview (including backup):

- List relevant team members and managers

Interview length: 45 minutes

Notes

Question 1:

Tell me about a time when you used feedback from other people (e.g., users, cross-functional team members, outside experts) to strongly inform the design or solution of a project you led or helped lead.

Follow-up questions:

Situation:

- Who provided the feedback?
- What were you designing or solving?

Action:

- How did you collect the feedback?
- How did you implement the feedback or take it into account?
- How did you determine that it should inform the design or solution?

Result:

- What did you learn from the experience?
- Have you applied what you learned in other situations?

RUBRIC		
POOR	**GOOD**	**STRONG**
Does not show respect for the ideas of others.	Implements feedback but does not demonstrate a robust decision-making framework for prioritizing the feedback and determining if it should inform the design or solution.	Example demonstrates how they reason clearly by prioritizing feedback with optimal impact and success.
Is unwilling to compromise their initial plan in light of new information.	Is willing to adjust their plan to incorporate feedback and new information but does so without weighing the quality of the feedback (e.g., "Hiring manager said we should do X, so I did X").	Shows an ability to distill feedback and new information and convert it into straightforward adjustments that need to be made; is able to identify stakeholders to gain diverse perspectives on changes being made and present solutions.
	Unable to share any learnings from the situation.	Shares learnings and ways they've applied them to subsequent situations.

Question 2:

What does a successful career look like to you?

Follow-up questions:

Situation:

- What motivates your career growth?
- How does this shape your career development and the opportunities you seek?

Action:

- What steps have you taken to move your career in this direction?
- How do you build goals for yourself?
- How do you hold yourself accountable for your growth and professional development?

Result:

- What have you learned from your current or past roles that has shaped your career vision?

RUBRIC		
POOR	**GOOD**	**STRONG**
Career goals are shallow and uncreative and tied to trivial goals such as job title or compensation.	Sets clear career goals but cannot elaborate on the reasoning when probed further.	Describes elements of a well-rounded career that go beyond a job title.
Is unwilling to compromise their initial plan in light of new information.	With guidance from a mentor, can relay their experiences to adjust their career plan.	Can draw upon past experiences and state how they have affected their goals.
Does not demonstrate a connection between their goals and the work or learning it takes to get there.	Shows a desire to grow through their work and develop new skills in pursuit of their goals.	Has taken clear steps to get closer to their career goals.
Does not take accountability in their career growth; continuously blames external factors for driving their career path.	Takes accountability for their career development for the most part; sometimes relies on opportunities presented to them to further their career.	Demonstrates accountability in their own development; does not solely rely on others to present them with opportunities.

Onsite interview 3: Structured thinking (roleplay)

Competency being assessed:

- Structured thinking

Who can do this interview (including backup):

- List relevant hiring managers and leaders

Interview length: 45 minutes

Format of interview: Roleplay/intake meeting

Evaluation guide:

- Evaluate the candidate's structured approach to problem-solving and ability to start with an open-ended scenario, narrow down the parameters, build a solution, and measure success.
- Evaluate whether this person will be able to form strong relationships with the teams they will be recruiting for by building trust and communicating effectively.

Context:

You're opening a role on your team (use an existing role if you have one), and this is your first meeting with a new recruiter.

- Share with the candidate that you'll tackle this in three parts:
    1. Defining the scenario or role
    2. Formulating a solution
    3. Measuring success
- Include basic information: a brief description of the team (function, roles, hierarchy, etc.) and the open role (level, location, any other relevant information).
- The candidate should lead this conversation, but you can use the questions below to probe for more detail as needed. This will be a two-way conversation, so you'd like them to lean on you for guidance by asking questions, challenging assumptions, and requesting feedback.

Notes

Task:

Walk me through the recruiting process.

Section 1:

Understand and define your situation. Questions may include but are not limited to:

- What gaps will this role fill?
- Which teams will this role partner with?
- What is the team's current state? What should its future state be?
- What hiring tactics have worked well in the past (referrals, cold sourcing, events, etc.)?
- Is this a one-off role or one of many?
- What are the must-haves for the role? What are the nice-to-haves?
- What do you know about the composition of the pipeline in terms of gender, race, and other diversity characteristics?
- What assumptions does the company have about hiring velocity?
- What is your sales pitch?

Bonus: It's a great signal if they push back on your assumptions with any evidence, data, or alternate solutions.

Section 2:

Build a solution from sourcing strategy to hire. Answers may include but are not limited to:

- Pipeline strategy: Leverage information from Section 1 to inform initial strategy.
- Job description: Do they plan to call out the must-haves? Do they mention the selling points?
- Advertising and evangelism.
- Interview criteria: How does it align with Section 1?
- Team involvement: sourcing, leveraging networks, etc.

Section 3:

Measure success. Answers may include but are not limited to:

- What data or metrics will they use to ensure they're tracking against the goal?
- What expectations do they set for communicating progress and challenges?
- What is expected of the hiring manager? What should the partnership look like?
- What does success look like?
- How do they iterate their approach? (E.g., If we aren't seeing X onsites within three weeks, should we pivot?)
- How do they benchmark criteria?
- How do they manage failure?
- How will this recruiting challenge and its success or failure inform future strategy?

RUBRIC		
POOR	**GOOD**	**STRONG**
Does not respond to feedback or prompting.	Takes coaching from the hiring manager well but relies on them to drive some aspects of the conversation.	Drives the conversation and leverages the hiring manager's existing knowledge base, knowing when and how to inform others.
Demonstrates scattered thinking or communication; is not able to talk through a solution in a structured way.	Has a good initial approach to tackling the problem, but is unable to adjust the approach when presented with new information or complexities.	Shows evidence of structured thinking and tackling the problem in an organized way when the hiring manager presents new data or complexities.
Does not encourage two-way engagement throughout the roleplay (i.e., runs through a list of questions and throws out a solution without checking in or gathering input).	Asks basic job-level questions but does not ask in-depth questions around the success of previous searches or how to understand more about the role, responsibilities, and context, for example.	Asks good questions to size up the situation; hits most of the points from the list of questions (it's a bonus if they think creatively outside of what's listed); questions go beyond tactical role specifics (top three skills, nice-to-haves, etc.) and demonstrate that the candidate thinks broadly about how to qualify a role.
Does not mention data or research when forming solutions or measuring success.	Mentions the importance of using qualitative and quantitative data to measure success, but does not reference or is unclear on how the data and insights would affect the search.	Takes advantage of both qualitative and quantitative data to inform process, strategy, and direction; can clearly explain why they are choosing the metrics that they plan on leveraging.
Insists on sticking rigidly to the plan they have laid out.	Is open to adjusting their plan but does not lay out a foundational plan for how to do so.	Intends to iterate or evaluate success along the way; says, "We'll check in after X onsites and adjust our approach if needed."

Onsite interview 4: Resilience and accountability

Competencies being assessed:

- Resilience
- Accountability

Who can do this interview (including backup):

- List relevant recruiting leader

Interview length: 45 minutes

Notes

Question 1:

Getting the job done may necessitate unusual persistence or dedication to results, especially when faced with obstacles or distractions. Tell me about a time when you were able to be very persistent in order to reach a goal.

Follow-up questions:

Situation:

- What were your goals?
- What were the obstacles you faced? What caused them?

Action:

- What are examples of your persistence?
- Who did you work with to achieve the results?

Result:

- Were you successful?
- What did you learn from the experience?

RUBRIC		
POOR	**GOOD**	**STRONG**
Relied upon the support of others because they lost the drive or motivation to continue in their efforts.	Has been persistent in the pursuit of their goals, only requiring assistance from their manager to unblock them and achieve the desired results.	Demonstrates unwavering dedication to their goals, regardless of the size or impact of the obstacles they faced.
No clear demonstration of their persistence in pursuit of their goals; does not leverage other team members when there is a clear opportunity to do so.	Can provide examples of actions they took to move toward their goal; clearly explains why they decided to work with or without other members of the team.	Clearly explains what actions they took and what impact those actions had; can thoughtfully reflect on whether they would do the same thing if they were presented with the situation again; reasoning for working or not working with others demonstrates sound judgment.
Is unable to reflect on their experience and take away key learnings; goals were vague and not measurable in any way.	Set clear goals but was unable to adjust timelines in the face of obstacles; did not define formal success factors and only relied on qualitative feedback; is able to recognize the key learnings from their experience but is unable to explain how they would avoid these obstacles if presented with the same situation again.	Set well-defined goals from the outset, including milestones that were adjusted based on obstacles encountered; implemented a framework to measure success and leverage data; can clearly explain the lessons they have taken away from the experience and put forward suggestions on how to avoid these obstacles in the future; committed to learning and developing in the process.

Question 2:

Describe a time when you had to make a difficult decision regarding your team's priorities or strategy.

Follow-up questions:

Situation:

- What was it?
- What were the options, and how did you weigh them?
- How did you consult with others on your decision?
- How did you get data or other perspectives on your decision?
- What company values did you consider in your decision-making?

Action:

- How did you communicate your decision?
- How did you respond to skepticism or questions?
- How did you defend your decision?

Result:

- What was the end result of the decision you made?
- What data would you have wanted to help with your decision-making?

Notes

RUBRIC		
POOR	**GOOD**	**STRONG**
Makes uninformed or rash decisions lacking in substantial support.	Takes a considered approach to decision-making but could have leveraged more robust data sources when making decisions.	Provides a well-rounded, informed approach to evaluating options in decision-making and uses examples of how they anchored their decision with data.
Meets opposing opinions with obstinacy or arrogance; makes the decision unilaterally, with little to no consultation with others.	Accepts the opinions of others but dismisses them when discussing how they arrived at the ultimate decision; only consults a select group of people they have existing relationships with.	Demonstrates ownership when faced with skepticism, doubt, or questions and is open to adjusting their approach when presented with questions about their strategy; consults with a wide range of people with varying opinions (or seeks out a variety of opinions), including those most affected by the decision, to solicit as much feedback as possible.
Cannot identify any company values that they took into account when making their decision, or dismisses the values themselves as non-factors.	Expresses an admiration or acknowledgment of the company values but cannot articulate how they were specifically considered in the decision-making process.	Clearly outlines how their decision-making aligns with company values and company priorities, not only their own priorities.
Unable to provide a clear explanation of the final decision; situation was left in an unclear state; cannot identify any missing data that would have aided their decision-making process.	Can provide a concise explanation of the ultimate decision reached; can identify the gaps in the data, but can’t explain how to make that data a reality.	Is able to reflect on the outcome of their decision in a thoughtful way, outlining both the benefits and drawbacks for all stakeholders involved; can provide insight into the data that they would have wanted when making the decision and how, given sufficient resources, they would be able to get that data in the future; is able to explain how they would put that data to use given a similar situation and the impact it would have on their decision-making.

Sample Interview Questions

There are a lot of sample interview questions available online. Ultimately, the key is to be consistent in what you ask and be sure to ask a range of situational ("How would you handle this scenario?"), behavioral ("Tell me about a challenge you overcame"), and strict competency ("Describe the last Excel model you built and how") questions.

With thanks to Stripe's CTO, David Singleton, for many of these questions, here are a few less commonly asked questions and what you might look for in a response:

1. Working with others

Tell me about a time you worked on something that you knew you wouldn't enjoy but which was necessary for the success of your team or company.

Follow-up question: How did you end up working on it? What did you accomplish? What would you do differently if you had another chance?

Seeking: Does the interviewee have an eager attitude and an ability to get up to speed and execute regardless of their feelings toward the work? It's a bonus if they actively volunteer to take it on.

Tell me about the lowest-morale team you've been part of.

Seeking: Did the interviewee bring levity to the group? Did they try to fix the situation? Did they run away?

When have you felt most connected to your coworkers? Tell me about a time when that connection was tested and how you adapted.

Seeking: Did the interviewee demonstrate good humor and a positive and productive attitude while in the trenches with others? Were they supportive and collaborative in difficult situations? Do they value results-oriented team achievement and learning from coworkers?

2. Getting work done

What project are you most proud of? What was your contribution?

Seeking: Do they seek out challenging work? Do they value navigating an unfamiliar experience? Did this project have a strong impact?

Tell me about a project where you've had to pull out all the stops to get it done.

Seeking: Can they discuss the specifics of the obstacles they had to overcome and how they influenced others to do excellent work?

Tell me about a project you've led that failed. What role did you play in the project's failure? What did you learn? What would you do differently if given the chance to do it over?

Seeking: Does their response demonstrate accountability, a growth mindset, an ability to self-reflect and be self-critical, resilience, learning from mistakes, and not blaming others or circumstances?

3. Personal motivation

Work can be challenging, and we know it's not the only thing on your mind. How do you approach balancing competing demands for your attention?

Seeking: Are they resilient? Can they do what's necessary to maintain focus? Do they have the ability to compartmentalize and self-awareness about how to maintain focus (e.g., exercise, therapy, a flexible work schedule)? How do they seek meaning from work? When necessary, do they work with people to plan for coverage if things are getting really tough?

Bonus: Do they help those around them do the same? Do they derive purpose from how their work helps others?

Avoid: Do they rely primarily on colleagues to carry them through tough situations? Do they lack coping mechanisms or demonstrate a lack of self-awareness ("Nothing ever bothers me")?

What's the best example of something in your current job that you don't like?

Follow-up question: How did you fix it, or have you already tried to fix it?

Seeking: Are they focused primarily on fixing things instead of complaining about them?

Tip: Let them explain the example, then assess its magnitude and whether it's meaningful and substantive.

What are you really excited about?

Seeking: Are they passionate about anything? Are they energetic and optimistic? Would they "set the room on fire" (in a good way!)?

4. Leadership

Tell me about the best leader you've worked for.

Seeking: Were they selfless, results-oriented, kind? Did they give indications of effectiveness or deliver feedback? What kind of feedback did they give?

Follow-up question: What made them a great leader?

Tip: Dig into the why behind the answer. It's not really important who the person specifically is, as long as the candidate can speak cogently about why this leader is the best they've worked with.

Follow-up question: What are that leader's weaknesses?

Tip: This is important, as it will give you a sense of what the candidate values in a leader. For example, do they value extrinsic impact, or creating a safe environment?

Tell me about a time when you personally worked super hard to get something important done quickly.

Follow-up question (engineering-specific): Tell me about the worst incident you handled and how you approached it.

Seeking: Are they willing to pull out all the stops and burn the midnight oil when needed? Are they willing to still "hold a pager" and do the work? Are they calm under pressure? Can they act as a prescriptive leader when needed?

Who was the best hire you ever made?

Tip: This should be a specific individual. Be sure to dig into the role and the hiring process.

Follow-up questions: Why exactly? What are the things that made them good for the role? What were their weaknesses? How did you convince yourself that they would be a strong performer given those qualities? How did they work out in the role? Why? What was different from what you expected?

Seeking: Is the person comfortable attracting and deciding on talent? Are they effective at hiring and building teams? Are they able to develop a good hiring process and learn from mistakes?

Notes

Written Exercise Example

Asking interviewees to complete a decent, well-constructed written exercise–be sure to provide clear instructions–is an opportunity to signal that your organization's work culture values timeliness and diligence. Whether or not an interviewee returns a high-quality response to the written exercise on time will tell you a great deal about how much they value these qualities.

Product manager written exercise

This exercise should take about three hours to complete, and your output should be no more than a few pages. Treat the deliverable as a pre-read that you would send before a meeting. We'll use your response to assess written communication, product sense, data analysis, technical reasoning and scoping, critical thinking, strategic thinking, and problem-solving.

As you work through the exercise, please make reasonable assumptions. For the purposes of this exercise, all data analysis can be completed in Excel or Google Sheets, and all data definitions are provided.

Prompt:

Users love our product, but even so, they sometimes churn. This is something that we take very seriously. Analyze this example churn data [link to data]. What is leading to churn? What are the most important takeaways from the data?

Imagine you're building a roadmap for improving retention: What projects and product changes would you prioritize to reduce churn? Make sure your response is specific enough to display your product sense and technical thinking.

Notes

Grading the written exercise

Attributes we're seeking:

- Written communication
- Data analysis and ability to translate data into actions
- Understanding the customer (customer sense)
- Product sense

Rubric

Score each candidate out of 12 total points: 3 each for written communication, data analysis, customer sense, and product sense. The total score should correlate to the following interview decisions:

RUBRIC	
POINTS (OUT OF 12)	**DECISION**
11–12	Strong yes
8–10	Yes
7	Judgment call
6 or below	No

RUBRIC			
SKILL	**POOR (1 PT)**	**GOOD (2 PTS)**	**EXCELLENT (3 PTS)**
Written communication	Hard to follow, long-winded, or sloppy.	Deliverable is easy to follow and conveys the main points. Structured, crisp, and clear.	You would feel comfortable sending this as a pre-read. Deliverable is coherently organized and well-articulated.

RUBRIC (CONTINUED)			
SKILL	**POOR (1 PT)**	**GOOD (2 PTS)**	**EXCELLENT (3 PTS)**
Data analysis, ability to translate data into actions	Only provides basic summary or is unable to pick a small number of cuts (e.g., presents pivot table of every view of the data without a clear approach for which slices are most impactful). Data barely informs the recommended set of actions, or actions are contradictory to the data analysis. Obvious errors in the data.	Conclusions drawn from the data are strong and accurate. Clarifies which data is most important and why it's worth actioning; parses the insights into "so-whats."	Picked a small number of important metrics to guide next steps and explained their impact on the business. Identifies why next steps clearly fix problems highlighted by the data.
Customer sense	Doesn't identify customer sements and their needs; fails to differentiate recommendations by customer segment. Dismisses particular customer segments as non-addressable (e.g., suggests that companies being acquired should not be considered).	Understands customer needs and provides concrete suggestions that vary by customer segment.	Carries customer insights and needs throughout many sections of the exercise, not just one.
Product sense	Unclear product ideas or inability to tie the product to user or business impact (e.g., recommends numerous "investigate why" steps but fails to articulate any product solutions).	Explains product gaps that need to be addressed. Makes a logical, balanced argument about why the company should consider these investments, but may lack a clear prioritization.	Provides creative, specific product ideas, highlighting users or strategy impact; clear prioritization of what is most important. Addresses something unique about their ideas (e.g., their go-to-market strategy would not just generically apply to any segment; calls out technical complexity or other risks associated with pursuing it, etc.). Recommendations are put in the context of the overall industry; discusses the implications for long-term business success.

Candidate Review: Decision-Making Framework

Because we often match an engineering hire with a team after they've gone through the hiring process, candidate review (CR) acts as both a hiring manager and an equity process. The committee reviews interview feedback, hire or no-hire recommendations, and leveling decisions for each candidate and provides final approval for the hire.

Step 1: Candidate submission

CR receives a candidate packet, submitted by the recruiter, containing the following information:

- A résumé
- A set of completed interview scorecards and a completed hiring committee scorecard
- A suggested outcome:
  - Yes for the company, no for my team (this outcome should be very rare and include a clear rationale)
  - Company hire
  - Team hire
  - No hire
- A suggested level

This packet of information is shared with each CR reviewer.

Notes

Step 2: Hiring committee scorecard and hiring manager rationale review

Hiring committee scorecard review:

- The scorecard provides an easily digestible picture of the candidate's performance, including a score (strong no, no, neutral, yes, strong yes) represented by a symbol for each interview.
- Each score should map directly to the interview rubric and therefore give a reasonably objective, high-level overview of the candidate's performance.
- CR reviews this feedback first to ground the review in the most objective measures: the standardized rubric items for each interview. CR will not review interview packets that do not include a completed hiring committee scorecard.

Hiring manager rationale review:

- This section can include some of the more subjective observations from the interviews and hiring committee. It should also help clarify how the committee reached its decision, especially in cases where the discussion led to a different outcome than CR would expect from the individually submitted objective scorecard output.
- Note: Inconsistencies are not bad, per se, but CR should be aware of instances in which the committee discussion differed from the scorecard outcomes. The scorecard should call those out early in the "hiring manager rationale" and/or "resolved FUD (fear, uncertainty, or doubt)" sections of the scorecard. Ideally, this will reduce the number of times CR sends packets back for additional information.
- In cases where the outcome is obvious, the hiring manager rationale can be as brief as "clear no hire" or "clear hire."
- In cases where the outcome is not obvious or does not reflect the objective scorecard outcomes, the hiring manager rationale is an opportunity for the hiring manager to state how they reached their conclusion.

Notes

Step 3: Scorecard verification

Once the hiring committee scorecard is reviewed, CR reviewers read through the individual interview scorecards and make sure that they:

- Reflect and are related to the rubric
- Are not based on subjective measures (subjective observations can be noted in the write-up and discussed in the trope, but the scorecard outcome should be based only on the rubric items for the interview)
- Are not too lenient or strict
- Are correct in that they reflect the rubric accurately

Notes

Step 4: Discussion, decision, and résumé review

At this point, reviewers should have a sense of:

- The expected CR outcome based on the objective interview outcomes in the hiring committee scorecard and the rubric items from the individual scorecards
- Any relevant subjective information from the individual scorecard write-ups and hiring manager rationale

The CR lead then begins a discussion to clarify any FUD or disagreement and identify whether any feedback should be provided to the hiring committee.

Finally, the group reviews the candidate's résumé to verify that the outcome makes sense and roughly aligns with the years-of-experience guidelines set forth in the engineering levels framework (a detailed framework we link to on our intranet).

Panel agrees and the CR lead selects one of the following outcomes:

- Hire at suggested level
- Hire at higher level
- Hire at lower level
- No hire: trope outcome overturned
- No hire: trope outcome confirmed
- TBD: sent back for additional information

Notes

Step 5: Submit CR scorecard with CR outcome

The CR admin submits a scorecard for the CR interview and emails any feedback to interviewers, recruiters, and hiring managers.

Interviewers, recruiters, and hiring managers are invited to provide feedback to CR via a feedback form to complete the feedback loop, leading to continual iteration and improvement.

Notes

Manager Transitions Guide

Here's a three-step guide for when a report is transitioning to another team within the company:

1. Current manager meets with the individual to preview the transition.

- Let the individual know about the transition and confirm the date of the formal move in the HR system (when their new manager will have access to their information and performance reviews).
- Give them a heads-up that you'll be scheduling a transition meeting with them and their new manager to discuss their current role and projects and their strengths and development plans.
- Make sure to answer or acknowledge any of the person's questions.

2. Current manager schedules a transition meeting.

Invite the person and their new manager to the meeting. Ensure that there's enough time to cover all of the relevant topics and to allow for all participants to ask questions.

Here's a template and agenda you can use when scheduling the meeting:

```
To: Employee
From: Current manager
Cc: New manager

Subject: Manager transition meeting

I'm looking forward to the transition meeting on [date]. The main goal is to make
sure [new manager] is well-informed by both of us on your work scope and work in
flight and has an overview of past performance and development conversations we've
had. Let's plan to cover the following:

    • [Employee] shares current work responsibilities and projects or goals. I'll
      add any additional info that I think might help [new manager].
    • [Employee] shares thoughts on strengths and areas for development. I'll
      chime in on what we've discussed and worked on together in this regard.
    • Discussion among the three of us on how to support [employee's] ambitions
      and development areas.
    • [Employee] provides thoughts on preferred ways of working for [new manager]
      to hear and for me to reinforce (or learn from!), plus any feedback for me
      that it might be useful for [new manager] to hear.
    • We all recap any concrete next steps that emerge from the discussion.

Let me know if you have questions. I look forward to the discussion.
```

3. New manager follows up with any action items.

Once the transition meeting is over, the new manager should follow up with any action items, since they will be owning the relationship going forward.

Notes

Working with Claire

I first wrote a version of this document in 2010, when I was managing the global online sales and operations team at Google. I shared the draft with my executive assistant at the time, Maeve, a thoughtful Irish woman with a keen eye. I figured she'd have some sharp observations on what it was like to work with me. She read it and frowned. "You forgot the most important thing!" she said. "What? Did I leave out an important meeting?" "No," she said, "you forgot to mention that you like good craic!" It took me a moment to realize that she meant I like to have a laugh at work. ("Craic" is Irish for having a good time.)

She was right. I spend a lot of my waking hours at work, and I think those hours should be fun. I've included that note at the bottom of every version of the "Working with Claire" document since, and it really sets the tone for my working relationships. It was a good reminder that sharing what gets you up in the morning on a personal level can be as important as the mechanics of working together.

Writing this document is a good exercise in self-awareness. Feel free to use a similar structure or make it your own.

Working with Claire: An unauthorized guide

First of all, I'm really excited to be working with each of you and your teams.

Operating approach

Biweekly or weekly 1:1s

- We'll try to keep the times consistent so you can plan. I'm a big fan of a joint 1:1 document to track our agendas, actions, goals, and updates.

Weekly team meetings, as appropriate

- I view these as both update and decision-making/work-review forums. I expect people to be prepared and to participate, even though we'll have to manage video conferences and time zones.

Quarterly planning sessions

- It's my hope that we can make these happen with strong pre-work and good follow-up afterward with our teams and partners (internal or external).
- It's possible that we'll have some separate business review–type meetings, and we can work hard to keep work manageable between these and planning sessions. Stay tuned.
- Speaking of 1:1s: We'll do a career session at some point in our first few months to talk about your history, why you've made the choices you've made, what your ambitions are for the future, etc. These help me know where you are in terms of your personal development interests and ambitions with respect to longer-term plans.
- Personal goals: I believe in the two of us reviewing the top 3–5 personal goals you have each quarter or so. These are the things that you personally spend your time on, not your team plans, which I know you also spend time on. We can discuss them each quarter, then create a plan for how we can make sure you get the time, space, and support to accomplish what you need to accomplish. I do these every 3–6 months and will share mine with everyone.

Your teams

- Please add me to emails or documents that might be helpful for me to see as a way to understand the team and day-to-day work. As work is ongoing or a team member does a great job on something, forward it or link to it in our 1:1 doc. I like to see work in progress, and I'm happy to meet with folks who have done great work so they can walk me through it, at your discretion.

Finally, I look forward to personally meeting everyone on your team. Let's make sure I've done that over the next few months.

Management style

Collaborative

- I'm very collaborative, which means I like to discuss decisions and options and whiteboard big stuff in a group. I will rarely get stuck in one position or opinion, but the downside is that you won't always get a quick judgment out of me – I need to talk it through and see some ideas, data, and options. Due to this bias, I can sometimes be slow to decide, so if you need a decision quickly, make sure I know it.

Hands-off

- I'm not a micromanager, and I won't sweat your details unless I think things are off track. If I do, I'll tell you my concern, and we can work together to make sure I understand and plan how to communicate better or right the situation. That said, when I'm new to a project or team, I often get into the work alongside people so I can be a better leader. I will get involved in details and be more hands-on early in a new initiative, so just be warned about that. That way, I will know how to help if you need me later.
- I expect you are making decisions a lot without me. If you come to me, I'll usually put it back on you with "What do you want to do?" or "What should you do?" and help you decide. That said, if there is a big decision brewing, I'd love to know about it, and I'm always here to talk it out. I like to know what's going on with you and your team.

Accountable and organized

- I take action items really seriously, and I expect you to know what yours are and when they are due, and to get them done. I don't like chasing them, but I do notice when things slip. It's fine to renegotiate deadlines, but I'll be annoyed if it's the day after the deadline.
- I dislike being caught last-minute with people working hard on something that we could have gotten ahead of. Please help anticipate big work efforts, and let's get in front of them together. Similarly, I want us to be ruthless in our priorities while we are resource-constrained. I need you all sane… and me too.

Data-driven…

- I like data and dashboards so that there is one (ideally) objective way to measure progress and results, but I dislike being bogged down in data and torturing the numbers. Let's review consistent information on what really matters. The goal is to use data to get insights, but not to lull ourselves into thinking that we know what's going on or to try to find answers that might involve going with our gut.
- I also like to agree on how we do things as a group, which we can then agree to change or make exceptions to, instead of everyone inventing their own processes and frameworks.

- If we're discussing something and you know of or can imagine data that would be useful to our decision, bring it up. (See the next point: Sometimes I go into intuitive mode when I should be analyzing first.)

But intuitive?!

- I'm also intuitive about people, products, and decisions, which means that I'm happy to handle situations when I don't have a lot of facts or data. You're thinking, "Uh-oh, she's going to jump to conclusions," but I've worked hard in my career not to do that. Ultimately, I think I have a good gut instinct, but I'm not wedded to it. Your job is to get my sense of something and then argue it out with me. I love a good fight to a better outcome.
- I use my intuition a lot with respect to talent management, and I've been told I'm good at reading people. Again, I work hard not to judge or jump to conclusions, but I will put forward hypotheses about your team members. Your job is to make sure I really know the people.
- I always like to know what's going on personally with people so I can see the whole picture. I am a believer that we are whole selves, not "work selves" and "home selves," and it will help me get to know you and your team better if I know context. If something difficult is going on with someone on your team, I'd love to know and be there to support you or them.

Strategic

- I try to think about where things will end up and the straightest line to get there, but I'm pretty flexible along the way. If there is swirl, I usually think to myself, "What's the big lever here? What problem are we trying to solve? Why do we need to solve it? When do we need to solve it? What information do we need and when will we get it?" I expect you to do the same. Every day, I try to ask myself, "What's the most important thing I can do?" and do that above all else. But sometimes I get buried under email and fail.
- By the way, I am often overly generous with my time and I say yes too often. If you see this, please flag it to me. Although I love meeting with people, I sometimes don't spend enough time on the strategic stuff because I am working on other things. Help keep me honest.

User-oriented

- I put this last because I think of my key leverage as being more about scale than about individual customer work, but I'm always interested in sales status, customer issues, customer stories, and meetings with users, especially when I'm traveling.

Communication

1:1s

- Use 1:1s for items better discussed verbally and topics that can wait for our weekly check-in. Email takes a ton of time, so use it wisely.
- If we don't have a 1:1 for a while, feel free to email me or reach out.

Email

- I read fast, but I have slight carpal tunnel in my left arm. I don't love writing super long emails, nor do I think they're very productive, although watch me break this rule on occasion!
- I will read every email I get in a day, but I don't always respond – just know that I have read it. I will only respond if you ask me something directly or if I have a question. Assume I did read the email within 18 hours. If you think I owe you a response, please resend the email or ask me about it. I won't be offended.

- I love FYI emails. Send me something you saw, a customer anecdote, an article, some data, or something someone on your team did. If you write “FYI” in the subject or in the forward, I’ll know it’s for my information but does not require a response or urgent reading. I’ll do the same for you. FYI = no response required.
- If you add me to a team email celebrating something that I somehow missed, I’ll know that’s the signal for me to weigh in, usually with “Yay!” Go ahead and add me to things like this, but don’t overuse it, or in my experience people will start to think it’s meaningless.

Chat

- If something is important, timely, or super short, feel free to ping me any time, even when my status is set to away.
- Short questions on chat are fine, but I might be inconsistent in my response times since I am often in meetings.
- If it’s a long topic and not time-sensitive, maybe just wait for our 1:1.

Overall, I like more communication rather than less, and I like to know what’s going on with you and your team, as that helps me do a better job for you. I don’t view that as micromanagement, but if you feel like I am too much in the weeds, please tell me.

Finally, I don’t believe I will create a lot of email volume, and I’ll be the first to recommend that we do a quick in-person sync to resolve something instead of having a long email exchange. Or, better yet, you can be the first to recommend it, and I’ll be the second.

I also like plans that are documented. I don’t care if it’s slides or docs or spreadsheets, but I expect detailed work has been done when needed. If you have work in progress, I’d love to be included early and often in development, but I’ll generally only weigh in when asked or on final review, even if I have draft access.

More about working with me

Feedback

- I like it. I like to give it and I like to receive it, particularly when it’s constructive. We’re in this to get better together. We’ll have an official review session every quarter, but I’ll try to be timely when I observe or hear something I think you should know about. Please do the same for me. I also like to know how and what your team is feeling and thinking, and I will do skip-levels, office hours, etc. Remember, whatever I hear or see, I have your back and I’ll tell you when I’m concerned. Anyone who vents to me about you is going to get my help to tell you directly.

Management and people

- I care a lot about you, your people, and everyone’s development. Please make sure that we’re touching base about your team and constantly building our skills as individuals and as teams, and that I know when there are superstars and challenges so that we can help people together.

Results

- Let’s get good ones and know we did. Measure, measure, measure.

Humor

- Finally, I like a good laugh and to have fun with the people I work with.

Hope this was helpful, and again, I look forward to working together. You are all welcome to add to this document and make it a little more “authorized”!

Working with Me Template

My role

Describe your role and goals.

About me

Describe your personality, communication preferences, and boundaries.

Operating approach

Include how you like to work, your day-to-day cadence (including 1:1s, other recurring staff meetings, and your operating cadence), what to loop you in on, longer-term strategic and planning cadence, and how you keep a pulse on your team and meet with them.

Management style

Add a few bullet points that summarize how you manage people. Are you collaborative, hands-on, or hands-off? Explain how you make decisions and give and receive feedback, context you like to get, and any principles or North Stars you reference.

Supporting you and your team

Set expectations around how you'll discuss individuals' careers, development, and goals together, as well as check in on progress. Also, indicate how you'd like to be included on teams' work, including materials and forums.

Notes

Notes

New Leader Experience

What is the New Leader Experience (NLE)?

The NLE is a program designed to help welcome and onboard new leaders to Stripe. The program consists of welcome emails, a series of prescheduled meetings and pre-reads, a leadership assessment (the Hogan Personality Inventory), and access to a coach for six months. It also suggests a series of first-month actions and provides a 360° review process at the end of the first 90 days so the leader can receive immediate feedback.

What makes for a successful NLE?

The engagement of the team involved in the spin-up and their ongoing support is paramount. This document exists to guide those involved through a set of steps to customize the experience to the division and the situation that the new leader is joining. The hiring manager, people partner, spin-up buddy (a manager or team member assigned to help answer day-to-day questions), and guide (an expert outside of the team who provides a safe space to ask questions or discuss observations), as well as everyone the new employee meets are what make this onboarding support effective.

See the next page for an example of a Stripe leader onboarding schedule.

Notes

WHO	WHAT
WHEN NEW LEADER ACCEPTS OFFER	
Recruiter	Send leadership hiring welcome/onboarding email, including: • Onboarding 101 FAQ sheet • Upcoming vacations
~2 WEEKS BEFORE START DATE	
Onboarding point person	• Confirm any unique needs for the new leader with the leadership recruiter. • Send welcome email introducing the new leader to their onboarding support team.
Hiring manager + people partner	Assign a point person to support the new leader’s onboarding (could be admin support).
Onboarding point person	Populate the new leader checklist and coordinate across their onboarding support team, including the onboarding buddy, company guide, and hiring manager. (This can be asynchronous, via Slack and/or meetings.)
Onboarding point person + new leader	Schedule meetings: • **Week 1**: Manager, onboarding buddy, company guide, and people partner (weekly for four weeks). • **Weeks 2–4**: Team deep dives, new direct reports, new skip-level reports, finance business partner, recruiting partner. Also: Add to team’s all-hands meeting. • **Week 4**: People-transition meetings with new direct reports and their former managers. Also: Possibly take Hogan assessment and review results. • **Weeks 5–8**: Key partners, other divisional leaders, and team immersion with people partner. Also: Add to company-wide leadership and manager forums, meet with leadership recruiter, add reminder to document first impressions and reflections. • **Week 9–onward**: Reminders to create personal development plan and “Working with Me” document, share 90-day reflections.
~1 WEEK BEFORE START DATE	
Hiring manager	Send introduction/welcome email introducing the new leader to the company.

WHO	WHAT
FIRST WEEK (NOTE THAT LEADER JOINS COMPANY-WIDE SPIN-UP/ONBOARDING SESSIONS)	
People partner or onboarding point person	Send the leader their welcome doc, which typically includes their onboarding support team, this checklist, important 1:1s, team deep dives, suggested reading (company and division level), and suggested comms channels (e.g., Slack channels and email groups to join).
~3 MONTHS IN	
People partner	Conduct 360° review interviews, synthesize findings, and discuss and identify goals for coaching.
Org dev	Complete coach-matching process.
Coach	Schedule first coaching session.

Notes

Chapter 4

Career Conversations

Duration

60 minutes (30–45 minutes if the person just graduated from school)

Approach

Pre-conversation

1. If you're working with a new team, take a moment in one of your first team meetings to let team members know that you're planning on having a career conversation with each of them over the next few weeks, and share the context and goals of the conversation. If you're working with just one new person, you can mention the career chat in an email or an early 1:1.

   Script:
   Over the next few weeks, I'm going to schedule a one-off, 60-minute 1:1 with each of you to better understand your past career moves and start working with you on your future development goals. I call these chats career conversations, but they're really get-to-know-you conversations. There's no pre-work required other than being ready to talk through a bit of your life and career history. If you like, you can bring a résumé to refer to, but it's not required. These are some of my favorite conversations, and they help me understand your career narrative. I'm looking forward to them!

2. Send a reminder outlining the goals for the conversation the day before you meet. There's no need to do it earlier — otherwise, people might feel like they have to prepare more than they should.

   Script:
   Thanks for taking the time to walk me through a bit of your life history and career in our session tomorrow. Mostly, I want to get to know you better. In particular, I'd like to learn more about the choices you've made so far and what motivated you to make them. If you like, we can talk a bit about where you grew up, your family, and why you chose to attend the school you did. We'll focus most of the time on the learning and career steps you've taken and why. If it's useful, feel free to share or bring a copy of your résumé.

   Toward the end of the conversation, I'd love to project out five years and have you consider where you think you'll find yourself in your career. Not a title or specific role, but where you see yourself generally and what your day-to-day might look like. All of this is laying the groundwork for us to make sure that we keep the bigger picture in mind when we talk about your development. When you're facing a choice about a project or even a new role, it will likely be useful for us to reflect on your career arc and make sure whatever you choose fits with the path you've outlined. Don't worry — no one is holding anyone to any five-year career plans, but it will be a helpful reference point as we continue to work together.

Conversation

You'll want to avoid over-scripting this conversation, so I'll just share some guidelines and sample questions here.

The conversation takes a "walk me through your history" approach. The most important thing to do is actively listen, take notes that you can refer to in future conversations, and ask "why" a lot. You're trying to understand what motivates the person and why they made the choices they did, and to help them reflect on those choices. What do they think about those decisions now? How did those decisions influence their thinking? What have they not explored? What do they want to return to?

Tell me about where you grew up.

Some people launch into a fair amount of detail about their childhood, parents, parents' occupations, and schooling. Others will share one step at a time. I don't pry on family topics, but I also remain open and listen closely if people do want to share. I'm a firm believer that family life and family patterns manifest in our work selves and that it's good to be aware of them. If people are reluctant to share, I try to emphasize that I'm looking to lay out some facts on location, schooling, and early interests. I find most people don't mind sharing more.

Tell me about where you went to school.

I get the person talking about what interested them in school, why they chose their college, if applicable, and why they chose their course of study.

What did you do right after college? Why did you make that decision?

These questions help you understand why your report made the choices they did after graduating. Did they know what they wanted? If not, what were their inklings? Why did they end up choosing what they did? Where did they think they would end up? Have they ended up there? Why or why not? Post-school decisions give you insight into a person's early motivations, which they often hold on to later in life.

Tell me about your favorite job. Tell me about your least favorite job. How and why did you make the decisions you made when choosing what roles you wanted to pursue?

Focus on the roles your report has had and the choices they made within companies. I try to get a sense of their path and their choices, especially the why. I also try to get a sense of the learnings they took away from their previous roles, especially about what work they're good at and enjoy doing and what work they find harder and why. Work your way up to the present and dive in if there's an interesting or telling nugget. Really dig into their motivations in this section and see if you can both surface some patterns.

What sort of work do you see yourself doing in the future? Who are the people you'll be working with? Where will you be living?

This is the forward-looking part of the conversation, and it's much more exploratory than the first four sections. Probe on any thoughts the person has about their future, no matter how abstract.

Focus more on what their future work or role looks like and less on a particular title or position. You're trying to figure out what type of work they want to be doing (management, research, execution, leadership, communication, analytics, advanced problem-solving, consulting, etc.) and dig into what they want to get exposure to in order to get there. Eventually, this conversation can support a discussion about career development plans, but the point is to align on opportunities you should both look out for to help the person start developing those skills or opportunities. Use some of the themes from the last four sections—how they make decisions, what was important to them—to guide the discussion here.

This section ends up being useful to reference in 1:1s because people often face choices that could benefit from a refresher on their longer-term goals. (For example: Which project should I pick? What parts of my role should I try to delegate?)

Wrap-up

Recap the conversation, share any notes you took, and write down two or three development goals to keep an eye on together.

Notes

Planning and Running Your Offsite

Planning checklist

Date of offsite:

1+ month before offsite

- ☐ Set goals and objectives.
- ☐ Schedule date, time, and length.
- ☐ Start brainstorming the agenda with your team.
- ☐ Book space.

1 month before

- ☐ Order food and beverages.
- ☐ Finalize the agenda and assign each section to a DRI.
- ☐ Share rough pre-work templates with DRIs.

1 week before

- ☐ Finalize materials.
- ☐ Run through the agenda and content with DRIs.
- ☐ Send the agenda, pre-reads, and any pre-work to the team.
- ☐ Check that all meals are scheduled and confirm your headcount.
- ☐ Confirm venue setup and any materials needed with the offsite space.
- ☐ Determine how to enter the space (e.g., do you need an entrance.code, or does someone need to let you in?).
- ☐ Duplicate the session template for each planned session.
- ☐ Duplicate the icebreaker template for each planned icebreaker.

1 day before

- ☐ Send a welcome email to the team; include the venue location, how to get there, and how to enter the space, and remind the team about pre-reads and pre-work.
- ☐ Confirm details with vendors.
- ☐ Collect supplies you'll need from the office (e.g., pens, markers, sticky notes, flip charts, chargers, AV equipment).

Day of offsite

- ☐ Have your team check-in, then follow the agenda for the rest of the day.

After offsite

- ☐ Send notes and action items to assigned DRIs.
- ☐ Send a feedback form to all participants and ask them to rate the offsite.
- ☐ Track all action items until complete.

Day-of-offsite templates

Offsite structure

1. Offsite welcome
2. Check-in exercise
3. Icebreaker
4. Session
5. Check-out exercise

Offsite welcome email

```
Welcome to the [offsite name]!

To get started, I'll share a bit more context about why we've gotten this group together and how we'll be using the time. And don't worry—we've got plenty of scheduled breaks and social time.

Purpose

We're here because [explain the purpose of the offsite].

Logistics

[Ahead of the offsite, share documentation and directions and tell participants what they should bring. On the day of the offsite, share information like the Wi-Fi access code, directions to the restroom, where you'll be eating lunch, etc.]
```

Notes

Agenda

Session	What we'll be doing	Time	Length	Facilitator
Check-in	Share expectations for the day	9:30 a.m.	30 minutes	Cheryl Davis
Session 1	Work style assessment discussion	10 a.m.	1 hour	Bethel Musa
Break	Take a stretch	11 a.m.	15 minutes	
Session 2	Last year results retrospective	11:15 a.m.	1 hour	Lola Aisca
Lunch	Eat!	12:15 p.m.	1 hour	
Post-lunch exercise	Big-picture brainstorm	1:15 p.m.	30 minutes	Alan Chowansky
Session 3	Decide on strategic pillars for this year (note: pre-reads required)	1:45 p.m.	1 hour	Maria Marquis
Break	Check some emails	2:45 p.m.	15 minutes	
Session 4	Finalize goals for the quarter and DRIs	3 p.m.	1 hour	Fang Li
Wrap-up and check-out	How did we do?	4 p.m.	1 hour	Cheryl Davis
Social	Social time and team-building cooking lesson	5 p.m.		Felix Marlin

Leadership Team Snippets and Updates

Please update by 10 p.m. on the Sunday night before the meeting.

Date:

Actions status: Link to action-tracking spreadsheet

Actions

- Name, action, due date

Discussion topics

- Actions (5 mins)
- User guest (10 mins)
- Metrics review: shortform (30 mins)

  Note: Metrics review alternates weeks with launch review, in which we review upcoming launches and overall roadmap status
- Leadership recruiting weekly update (10 mins)
- Internal audit quarterly update (10 mins)
- Topic from CEO (10 mins)
- Review top goals and strategic priorities (60–120 mins)

Standing questions

- QBR reflections from the past week
- Are there any snippets to share with the wider leadership team or company-wide?
- Are there any topics discussed that anyone objects to being passed down in staff meetings?
- What decisions were made? Is there anything we should clearly communicate to the wider leadership team?

Customer issues

- Short summary of key customer issue, actions, and owner

Customer wins

- Short summary of key customer wins and contributors

Snippets

Executive team member name:

- Assigned action item updates – also in tracker
- General updates (e.g., whereabouts, travel plans, offsites)
- Potential topics for discussion and why they should be discussed
- Major company or product initiative status and learnings or customer contract negotiation status and learnings
- Top-level notes from a customer meeting or external event
- Launch, event, or PR plans in flight
- Info on top talent

Notes

Stripe's Unblocking Process

David Singleton, Stripe's CTO, created this process to help unblock a decision when individuals, groups, or teams are unable to agree on a path forward and have already tried to find a solution collaboratively.

First, try to solve locally

Stripes make thousands of decisions every day, and the vast majority are reversible or tunable. For these kinds of decisions, we should optimize for speed: Make the decision and iterate quickly.

If you find yourself involved in a disagreement over a reversible decision, ask if it really matters. If we iterate over time, will we get to an optimal endpoint either way? If so, maybe this decision isn't a big deal. Second, ask yourself if it's truly important. Can the folks who will do the majority of the work move forward on a path that any dissenters can commit to supporting, even if those who disagree might have chosen another path if they were doing the bulk of the work?

If you're making a multi-constituency decision that is important and is not easily reversed, taking some time to debate makes sense. If that doesn't quickly result in a decision, kick off the unblocking process!

Unblocking is not bad. Slow, unclear, or bad decisions are bad. For meaningful, irreversible decisions, we'd rather involve people responsible from "both sides" than hinder forward progress, move in the wrong direction, or hurt trust between teams and individuals.

We experience a real cost—both in lost productivity and in diminished happiness—when teams don't agree and can't move forward without resolving a decision. Therefore, if you find yourself in a position where you're blocked by the lack of a resolved decision, it's your duty to instigate this process. We request that once you have identified an area of misalignment, you work with your coworker(s) and commit to resolving it within five business days of kicking off the unblocking process. (In cases bound by a lack of data, the commitment is to align on how to answer within five days of the data being available.)

Notes

How to unblock

1. Document the disagreement together. This document can be extremely short. Half a page is fine. Outline:
    1.1 The problem to be solved (ideally described as the goal of the joint enterprise in the voice of the user).
    1.2 The options considered.
    1.3 The trade-offs both parties see between the options. Highlight the trade-offs that could not be resolved without further help.
2. Sometimes producing this document will result in agreement. If so, great! But if it doesn't, email it to your managers.
    2.1 If the authors report to different managers, the document should be sent to both managers.
    2.2 The managers might decide to call a meeting.
    2.3 If escalating to a single manager, the expectation is that they'll make a decision. If escalating to multiple managers, they'll hopefully decide together. But if they can't reach an agreement, they should raise the issue with their respective managers recursively (possibly adding more context to the unblocking doc) until a decision is reached (or the stack overflows).

Unblocking should be bilateral but can be unilateral

1. If one of the parties declines to unblock jointly, the other person should inform them that they'll do it alone and invite the other party once again to bring the matter "up" together.
2. If the reluctant party continues to refuse, the other may then unblock unilaterally, with the other party copied on cc.

Is this a request to unblock?

If you're raising an issue with a manager and you might then present their feedback as a decision to an individual or group that you know or suspect disagrees with your stance, that is a request to unblock. The other party should be present for the discussion.

What to do if you get a unilateral request to unblock

To support this process, all managers must refuse to listen to any argument brought to them unilaterally unless they obtain an affirmative answer to the following questions:

1. Have you and your colleague tried to resolve this problem using constructive negotiation? If the answer is no, please try that first.
2. Have you tried to use the unblocking process, and have you written an unblocking document with your colleague? If the answer is no, please do that first.
3. Have you tried Step 2 and told your colleague that if they didn't use the unblocking process, you would bring the problem to me alone? If the answer is no, please tell them first.

If the manager gets three yeses, they should message the missing colleague and ask them to attend. This sets a cultural norm: It's not acceptable to refuse to unblock jointly.

Example

The details of this example are fictional.

Charlie works on the widget product team and Alice works on the storage team. Charlie and Alice have different managers, Chun and Aiden, respectively. Chun and Aiden both share the same manager, Bharath.

Charlie is implementing a new set of features that require the storage of mass-market end user personally identifiable information (PII) and has received guidance from product counsel that this data should be encrypted at rest. Charlie consults with Alice to get her opinion on how to store this PII, and Alice advises that the current storage systems do not do encryption at rest. However, it's on the team's roadmap, and Charlie should wait until it's supported. Alice offers to expedite the development of this feature so it could be available for Charlie to try out in a few months' time.

Charlie says that's a problem, as the widget team wants to launch an internal alpha no later than two months from today. He proposes instead that the product team stand up a new storage system and build their own encryption at rest support. Alice thinks this is a bad idea and shares concerns about how this would be supported and maintained in the long term. Alice also thinks the amount of work it would take to build the key management system and integrate with the systems that the storage team has built around personal data deletion and compliance is being underestimated. Charlie and Alice do not reach an agreement on the best path forward.

Charlie brings up the need to build a new storage system supporting encryption at rest to his direct manager, Chun, mentioning that it will speed up development significantly. He notes that Alice was pushing for another path and that they have failed to agree on the way forward.

Chun asks Charlie if he has tried to resolve the disagreement using constructive negotiation with Alice. Because Charlie has tried that already, Chun then asks Charlie to use the escalation process described in this document.

Charlie and Alice write the following cosigned document. In writing the document, they collaboratively ask themselves, "What are we really trying to do?" and manage to frame the discussion in terms of a goal, the crux of the decision sought, and the trade-offs inherent in each path.

Notes

Fictional example document

Stripe alignment model

Authors

Alice, Storage

Charlie, Widget

Date: May 31

Goal

Deploy a widget system that meets encryption at rest needs in a timely fashion.

Decision sought

Whether to build and deploy a new storage system supporting encryption at rest in time for widget's internal trial in July.

Options considered

A. Wait for the storage team to deploy encryption at rest on their existing system, which will push the widget trial to September at the earliest.

B. Deploy a new instance of MySQL Enterprise with transparent data encryption, to be maintained by the widget team.

Trade-offs

Option A:

- Explanation of why the widget trial's July deadline is important.
- Link to docs for planned encryption at rest feature on the storage team's stack rank.

Option B:

- Explanation of how MySQL Enterprise would be deployed (mostly provided by Charlie, but Alice agrees that it captures the state accurately).
- List of the key management, maintenance, and systems integration tasks of concern (mostly provided by Alice, but Charlie and Alice agree on listing them).

Charlie and Alice jointly email the doc to both of their managers. Chun, Charlie's manager, suggests meeting in person to resolve the disagreement.

Charlie, Alice, Chun, and Aiden meet and review the document together. Both Chun and Aiden ask clarifying questions and make some live edits to the document for completeness. Ultimately, they don't agree on the best path forward after this brief discussion, so they agree to take the escalation to their manager, Bharath. (This scenario, with the mutual managers escalating to their shared manager, is expected to be an exception rather than the norm. It's detailed here for illustrative purposes.)

Chun sends the document via email to Bharath with Charlie, Alice, and Aiden on cc. Bharath reviews the document and decides that the widget team should not stand up a new storage system and Option A should be chosen. Bharath documents the rationale in reply to the escalation email. The group moves forward with this decision, and Chun and Charlie commit to following this course.

Notes

Chapter 5

Performance Review Template

This template is meant to help managers create an outline for a written performance review. It will also help them prepare for calibration conversations. Consider including links to guidance on job ladder expectations and how to set performance designations for managers to consult.

Name:

Current level:

Start date in role:

How long they were here during the review period:
(Note whether the review period was less than a half-year and consider any time on leave.)

Proposed designation:

Proposed promotion (yes or no):

In one sentence, why did you not choose a higher designation? (N/A for "greatly exceeds")

In one sentence, why did you not choose a lower designation? (N/A for "does not meet")

In one sentence, summarize the takeaway you want to deliver to this person with this half's designation and review: (You should communicate this to the person during their review.)

Impact

Using the template questions below, describe the 2–3 projects or areas where the person had the most impact this half. Keep in mind that company-building work, including mentorship, recruiting, and diversity, equity, and inclusion, should be included here if they made significant contributions.

Area for impact 1: Describe briefly here.

Name/description of project/area, including relevant context (e.g., size of project, level of difficulty, etc.).

- What was the duration of their contribution?
- Who were the key collaborators or stakeholders?
- What was their role and expectation for impact in this area?
- What was the resulting impact, and were expectations met? If not, why not? Include relevant metrics if possible.

Area for impact 2: Describe briefly here.

Name/description of project/area, including relevant context (e.g., size of project, level of difficulty, etc.).

- What was the duration of their contribution?

- Who were the key collaborators or stakeholders?

- What was their role and expectation for impact in this area?

- What was the resulting impact, and were expectations met? If not, why not? Include relevant metrics if possible.

Area for impact 3: Describe briefly here.

Name/description of project/area, including relevant context (e.g., size of project, level of difficulty, etc.).

- What was the duration of their contribution?
- Who were the key collaborators or stakeholders?
- What was their role and expectation for impact in this area?
- What was the resulting impact, and were expectations met? If not, why not? Include relevant metrics if possible.

Strengths

Describe which 1–2 strengths this person demonstrated during the review period and provide an approximate designation for that strength relative to their current level. In identifying strengths, consider, but don't feel limited to, the core capabilities of the role.

For each strength, provide a short summary referencing 1–2 supporting examples. If the person is a people manager, consider the manager ladder and principles in your assessment.

Strength 1: Describe briefly here.

- Approximate designation (partially meets, successfully meets, etc.) for this strength
- Summary, including 1–2 examples

Strength 2: Describe briefly here.

- Approximate designation for this strength
- Summary, including 1–2 examples

Development areas

Describe which 1–2 development areas this person demonstrated during the review period and provide an approximate designation for that development area relative to their current level. If a person did well overall, development areas may be all "successfully" or even "exceeds" or "greatly exceeds"; if they did not, they may be "partially" or "does not meet" relative to their current level. In identifying development areas, consider, but don't feel limited to, the core capabilities of the role.

For each development area, provide a short summary referencing 1–2 supporting examples. If the person is a people manager, consider the manager ladder and manager principles in your assessment.

Development area 1: Describe briefly here.

- Approximate designation for this development area
- Summary, including 1–2 examples
- Ideas for how to improve

Development area 2: Describe briefly here.

- Approximate designation for this development area
- Summary, including 1–2 examples
- Ideas for how to improve

Promotion proposal: yes or no

If no:

- When might they be ready to uplevel (H1, H2, or later)?
- Briefly, what do they need to do for promotion in the future or, for higher levels, to grow in their career?

If yes:

- How long has the person been demonstrating next-level capabilities and behaviors?
- Provide 1–2 examples of how this person has been demonstrating next-level capabilities and behaviors.
- In 1–2 sentences, what is the primary area for development at the next level? (This is not meant to prevent upleveling but to proactively identify next steps in the person's career development.)

Compensation Conversations Preparation and Guide

Compensation conversations link pay to performance and influence individuals' sense of trust and fairness. They are among the most critical discussions a manager has. The purpose of this document is to help you prepare, especially for what may be tougher conversations.

Timeline and resources

Outline your company timeline and link to any important resources, such as fact pages about your compensation program and manager education guides.

Preparation

Be sure you understand and can explain the compensation philosophy.

Prepare at the individual level:

- Think through each person's story, including their current career stage, date of last uplevel, and the size of their last salary increase.
- Try to gauge what the person may be expecting based on this data and anticipate how any compensation changes may align with or disappoint those expectations.

Be prepared to own the message:

- Be ready to move flexibly with the conversation. This may include a blend of teaching, active listening, congratulating, or working through a tough message.
- If the person received a promotion or increase: Celebrate! Recognize the person and reinforce the impact and behaviors they've demonstrated. However, do not set the expectation that they will receive the same total increase moving forward.
- If a misalignment of expectations arises: Be ready for a reaction. Money affects people personally, so it can be an emotional subject. Own the results, even if the message is difficult or disappointing. Empathize and listen, but be careful not to apologize or make promises about a future outcome you can't guarantee. Consider tying the outcome to performance or another rationale, as needed.
- Other tips: Remember to communicate even if there is no change in compensation. If you don't know the answer to a question, say that and offer to circle back once you've gathered more information.

Outline of a compensation discussion

Check for understanding:

- Ask the person if they've reviewed and understand our philosophy. If the answer is no, take a moment to explain it to them and refer them to resources.
- Answer any questions they have. If you're not sure of the answer, commit to coming back with an answer at a later date.

Describe the outcome of the process:

- Remind them of their current compensation.
- Share or affirm their base salary for the coming year. If there has been an increase, celebrate it! Point to the critical work the person delivered and talk about their positive trajectory. Highlight the areas for further development you're working on together. If there is no change, refer back to the program design and, if appropriate, tie the compensation outcomes to performance and the development areas you're working on together.
- Share their target bonus for the coming year. If there's a change, highlight it.

Open it up for discussion:

- Create space for questions.
- Move with the conversation (congratulations, working through concerns, etc.).
- Reinforce that you value their contributions to the company and the team.

Notes

Performance Improvement Documentation Templates

Initial documentation of feedback after meeting

(1:1 and/or performance review of "partially meets expectations")

[Name],

I wanted to recap what we discussed [yesterday/over the past few weeks] in our [1:1/performance review].

We talked about you not currently meeting the expectations for [area of development]. You have [summarize performance relative to expectation]. A few examples that we discussed related to these areas were:

- [Example of not meeting expectations: the situation, the observable behaviors, and the impact they had]
- [Additional example of not meeting expectations]

In order to improve on the areas identified above and bring your performance in line with the company's expectations of you, you will need to work on:

- [Performance expectation expressed as an actionable next step]
- [Additional performance expectation expressed as an actionable next step]

If you focus your effort on these areas, I think you can quickly make the necessary improvements. We'll start checking in on these goals weekly for the next [X] weeks, to make sure you're continuing to improve in these areas.

As your manager, I'm here to support you—please let me know how I can help. My goal is to see you get back on track and succeed in your role here!

Progress update

[Name],

I'm following up to summarize what we discussed in our 1:1 yesterday with regard to the areas of improvement to get you back on track.

[Restate performance expectation from initial feedback.]

You have [describe performance relative to expectation and provide progress assessment]. Specifically, a few examples that demonstrate progress are:

- [Example related to progress: the situation, the observable behaviors, and they impact they had]
- [Additional example related to progress]

You should continue [doing X] and also [examples of what else they can do].

[Restate performance expectation from initial feedback.]

As we discussed, [area of development] still needs to improve.

- [Example of what behavior needs to change: the situation, the observable behaviors, and the impact they had]
- [Additional example of what behavior needs to change]

Please note again that [area of improvement] is a part of your core role, and it is critical that you demonstrate this in order to meet expectations of [ladder and level].

For both of these areas of development, we'll continue to check in over the next few weeks.

Employee getting back on track

[Name],

Over the past [time period], we have talked about you improving your performance in [area of development]. You have [summarize performance relative to expectation]. A few recent examples related to these areas were:

- [Example of meeting expectations: the situation, the observable behaviors, and the impact they had]
- [Additional example of meeting expectations]

You have been demonstrating good progress, and I can confirm that you are meeting performance expectations for your role and level. I expect you to sustain this performance, and we'll continue to monitor these areas in our 1:1s.

It's great to see you're back on track!

Insufficient progress (after a reasonable period)

[Name],

Over the past [time period], we have talked about you not currently meeting the expectations for [area of development]. You have [summarize performance relative to expectation and the impact]. A few recent examples related to these areas were:

- [Example of not meeting expectations: the situation, the observable behaviors, and the impact they had]
- [Additional example of not meeting expectations]

I recognize that you have been putting in some additional effort. However, I am concerned that these examples are further indication that the feedback we've been discussing for the last several weeks has not been addressed.

At our next 1:1, I think we should realistically discuss whether you are going to be able to meet performance expectations for [ladder and level]. I know this is difficult to hear, but I want to make sure that you understand the situation.

Notes

Performance Improvement Plan Template

Note: This template may need to be adapted for different geographical jurisdictions.

A performance improvement plan (PIP) is a signed, standalone document that outlines clear performance expectations for a person, identifying areas in need of development and setting deadlines to measure success. The duration of a PIP should provide a reasonable amount of time to fairly assess a person's performance against set metrics (typically four to six weeks). By the end of a PIP, the person is either successfully meeting performance expectations for their role and level or is likely transitioning out.

A PIP should not be the first time a person receives performance feedback. You should have already had several documented conversations identifying areas needing development, including providing examples of the person's performance gaps and offering support to empower them to meet expectations.

Notes

Performance improvement plan

Name:

Manager:

Date:

As we have previously discussed, and as outlined below, your performance has not met expectations for your role and level. The goal of this performance improvement plan is to identify areas for development and provide you with the opportunity to improve your performance. We want you to have the tools and resources you need to perform at your best and succeed.

Role expectations

You are expected to know, understand, and meet the performance standards of your role. As a [role], we expect you to [main goal of role and impact]. In order to achieve this, the following duties are an imperative part of your success:

- [Include 3–5 points summarizing key expectations for the role based on job description, level, and ladder. These should specifically relate to areas in need of improvement.]

Areas for improvement

Although you meet some of the skills and abilities of your role, there are specific areas where you are not consistently meeting expectations. Specifically, the following areas require immediate improvement:

Area of improvement 1

- Description of expected standard and how this standard relates to the company; consider operating principles
- Description of gap or deficiency in relation to expectation (where is the person falling short?) and what the impact is on the project or team
- Examples: Share specific, demonstrable examples of where the employee has not met the expectation, including dates

1/4

Area of improvement 2

- Description of expected standard
- Description of gap or deficiency
- Examples

Area of improvement 3

- Description of expected standard
- Description of gap or deficiency
- Examples

Improvement goals and targets

To help you form an action plan to improve your performance in the areas listed above, I've created specific goals and targets that I expect you to meet during the course of this PIP. In order to pass this PIP, you must accomplish the following goals:

Area of improvement 1

- Goal and time frame: What do you want to see the person accomplish and when? What does success look like?
- Deliverable: What is the expectation for improvement? How will the person demonstrate that they have accomplished this goal?

Area of improvement 2

- Goal and time frame
- Deliverable

Area of improvement 3

- Goal and time frame
- Deliverable

Milestones

In the PIP period, I expect you to complete the following projects within the deadlines provided:

- [Project 1] by [deadline]
- [Project 2] by [deadline]
- [Project 3] by [deadline]

Resources

We are committed to helping you achieve these improvement goals and targets, meet expectations, and pass this PIP.

I am available to help you prioritize and remove or navigate any blockers that you encounter during the PIP. Please note that while there are a variety of resources available to you, you are expected to take initiative and demonstrate self-direction when pursuing the goals set out in this PIP.

If you feel that you need additional support or training in a particular area during the PIP, please raise this with me so that we can discuss the best way forward. I encourage you to take advantage of educational resources such as [insert relevant links] to build your skill set. Please also feel free to reach out to your HR partner, [name], if you need additional support or guidance.

Progress checks and evaluation

We will meet every week to discuss your progress against the PIP. Please keep notes and records of your accomplishments and any blockers so that we can discuss them.

We will evaluate your success in the PIP in [X] weeks, at the conclusion of this PIP on [date]. Please note, however, that I may terminate the PIP at any time prior to its conclusion. The fact that you have entered into a PIP for [X] weeks in no way guarantees employment for that period of time. This PIP does not change the at-will nature of your employment, meaning that you or the company may terminate your employment at any time for any reason, with or without notice.

3/4

Given the duration and seriousness of your performance deficiencies, failure to successfully meet the expectations outlined in this PIP may result in termination of your employment. If you successfully complete the PIP, please note that you must maintain this level of performance moving forward, and further underperformance may result in termination of your employment without a further PIP.

Summary

This performance improvement plan is an important time for you to focus on your areas for development and demonstrate that you are able to meet all of the performance expectations for your role. I am committed to being clear in my feedback and guidance to you in order to provide you with the best opportunity for success at this company. Please feel free to reach out to me at any time with questions you have about the process.

I have read this performance improvement plan, discussed it with my manager, and understand the information and expectations it includes.

Employee signature

Manager signature

Notes

Managing Out Checklist

- [ ] Provide feedback on performance issues.
- [ ] Document the feedback.
- [ ] If relevant, run a formal performance improvement process.
- [ ] Familiarize yourself with local employment regulations.
- [ ] Inform your manager and your HR partner, if you have one.
- [ ] Hold the coaching-out conversation with your report.
- [ ] Agree on the timeline for leaving and the communication plan.
- [ ] Announce the departure to your team or organization and any transition plan details if their role requires immediate coverage.

Stripe Press

Ideas for progress
South San Francisco, California
press.stripe.com