



# Hiring Toolkit

## Financial Manager

**Customizable, Ready-To-Use Resources**

### **Included in this toolkit:**

- **An inclusive, skills-based job posting**
- **Sourcing channels to reach a more diverse set of candidates**
- **Resume screening guide**
- **Skills-based interview guide and evaluation rubric**
- **Interviewee selection tool**
- **Onboarding plan**

The Rework America Alliance has developed resources to help employers adopt more inclusive, skills-based talent management practices, helping employers to remove bias from the hiring process, better recognize the capabilities of candidates, increase diversity, and support their local communities.

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## About the Rework America Alliance

The **Rework America Alliance** is a nationwide partnership of civil rights groups, nonprofits, private sector employers, labor unions, educators, and others. Alliance partners are working together to get people without a college degree into better-paying jobs that provide opportunities for career growth. In particular, the Alliance is working to support Black and Latino workers who face some of the most challenging barriers to economic mobility.

## What are Inclusive, Skills-Based Practices?

Rather than relying on education, credentials, past experience, and other proxies for ability, a skills-based strategy recognizes that there are many ways to acquire knowledge and ability. Skills-based practices help employers identify and articulate the skills needed in a role and build processes for assessing and validating those skills.

Implementing inclusive skills-based hiring practices can help employers reduce bias and increase diversity, identify and articulate the skills needed in a role, fill skill gaps, support career development, reduce turnover rates, and open the door to more skilled employees from various backgrounds and industries.

Research has shown that hiring based on skills is 5x more predictive of future performance than hiring for education and 2.5x more predictive than hiring for work experience.

### What is Included in the Toolkit

This toolkit has customizable, ready-to-use resources to help you take a skills-based approach to sourcing and hiring talent.

- **Skills-Based Job Posting:** Customizable job postings highlighting role-specific skills with inclusive language. Designed to engage candidates and attract a diverse talent pool.
- **Resume Screening Guide:** A candidate selection rubric containing role-specific skills, focusing on the skills new hires need. Helps to remove bias in the screening process.
- **Interview Guide and Evaluation Rubric:** Questions specifically designed to assess skills, with a rubric for evaluating responses. Asking all candidates the same skills-based questions reduces bias and makes it easier to compare candidate responses.
- **Interviewee Selection Tool:** An interview question comparison guide enabling hiring teams to assess interviewee scores across skill areas. The tool focuses conversations on candidate skills and abilities.
- **Onboarding Plan:** A sample skills-based plan to get new hires up to speed.
- **Sourcing Channels:** Starter lists of job boards, career fairs, and other channels to diversify and improve candidate pools.

Learn more with the Rework America Alliance's [Skills-Based Sourcing & Hiring Playbook](#)

A step-by-step guide providing advice, case studies, resources, and tips from leading employers on how to implement key skills-based talent practices.

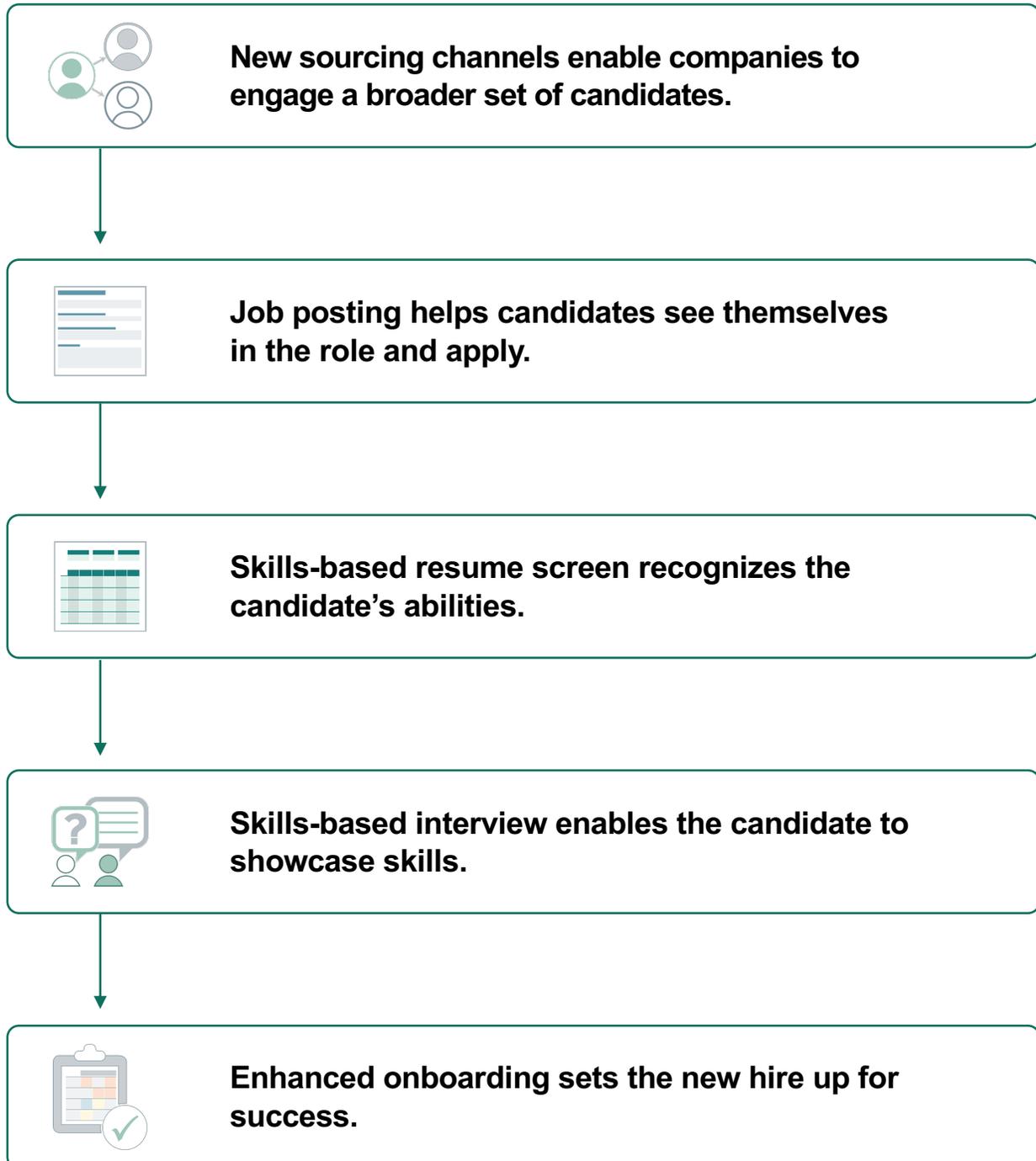
# A Skills-Based Approach in Action



## Focusing on Skills Helps Job Seekers and Employers

Where a pedigree-based approach tends to result in new hires with the same background and experiences as existing staff, a skills-based approach enables organizations to leverage a wider talent pool and build a more diverse and high-quality workforce.

This approach also enables workers to see how their experiences and skills could help them succeed



# Skill Comparison Guide



Limiting your requirements to what is truly needed increases your chances of finding a candidate with the skills needed to get the job done.

## Occupational vs. Foundational Skills

### Occupational Skills

Skills are **specific to an industry or job**. These skills are the Occupational skills a person needs to perform narrowly defined tasks and duties.

### Foundational Skills

Skills are **professional knowledge and skills that are transferable** from one job to another and across industries.

## Required vs. Preferred Skills

### Required Skills

Skills that are **necessary to perform essential job duties** at the specified level and there is no capacity to train; therefore, a candidate must have them on day one to complete job responsibilities.

### Preferred Skills

Skills can be **trained during onboarding** and/or are used to perform non-essential job duties.



## Expanding Sourcing Channels Enables You to Reach Untapped Pools of Talent

Traditional sourcing strategies focus on a narrow set of colleges, job boards, and peer companies. The result is a homogenous candidate pool, inflated recruiting budgets, and lower retention as companies compete over a small subset of the workforce. Expanding your sourcing channels enables you to reach untapped pools of talent, leading to better and more diverse hiring.

The information below provides a starter list of job boards, community organizations, and other tools to help reach and engage a more diverse candidate pool.

**The following are examples of organizations available for partnership to help you diversify your talent pipeline and tips and suggestions for working with them.**

### Job-readiness organizations

- [UnidosUS](#)
- [National Urban League](#)
- [Goodwill](#)
- [Rural LISC](#)

Screening and training provided for employability and job-specific skills

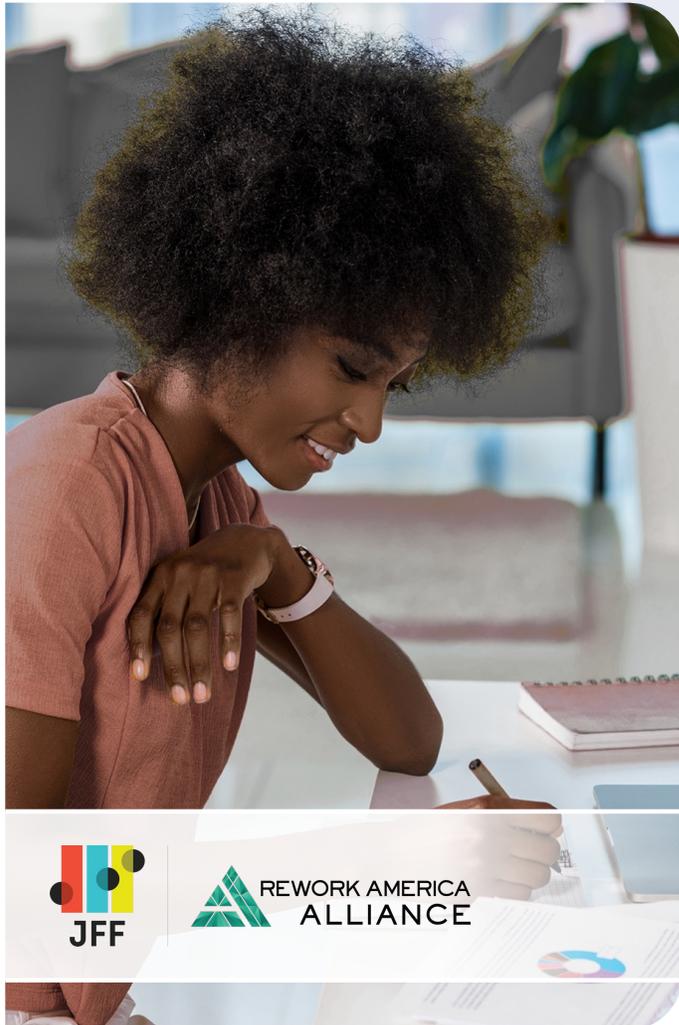
### Support existing apprenticeship and pre-apprenticeship programs

- [The U.S. Department of Labor – Apprenticeship Site](#) is a good source to help you develop and launch an apprentice program.

### Virtual career fairs and job boards designed for specific populations:

- **Applicants with disabilities:**  
[Recruit Disability](#), [Hire Autism](#), [Blind Institute of Technology](#)
- **Veteran applicants:**  
[Veteran Recruiting](#),
- **Applicants with criminal records:**  
[National Employment Law Project](#)
- **LGBTQ applicants:**  
[Out for Undergrad](#), [Pink Jobs](#), [Campus Pride](#), [Out & Equal](#)
- **Black and Hispanic applicants:**  
[Jopwell](#), [Diversity.com](#), [PDN Recruits](#), [iHispano](#), [Black Career Network](#), [Black Jobs](#), [Hispanic/Latino Professionals Association \(HLPAA\)](#)
- **Female applicants:**  
[Fairygodboss](#), [PowerToFly](#), [Career Contessa](#) (focus on millennials),  
[Female Executive Search](#) (focus on C-level candidates), [The Mom Project](#)
- **Immigrant and refugee applicants:**  
[Upwardly Global](#), [Amplio Recruiting](#)

# Job Posting Template



## Why Inclusive, Skills-Based Hiring Matters

### Struggling to attract a diverse, job-ready candidate pool?

Your job posting could be turning top candidates away.

An inclusive, skills-based job posting removes bias-prone credential requirements that dissuade potential candidates – especially those from more marginalized communities – from applying.

It replaces them with descriptions of the responsibilities of the role and the skills needed to succeed, enabling candidates to visualize how their background and abilities might translate to the job. It also provides additional detail on the role, workplace culture, and compensation.

For additional job posting support visit: [generator.skillful.com](https://generator.skillful.com)

The Skillful Job Posting Generator is a free online tool to help identify the skills and competencies required for a job and incorporates those skills into a simple job posting format.

### Want to learn more about how to write an inclusive, skills-based job description?

📍 Check out the Job Description section of our [Sourcing & Hiring Playbook](#).

#### Instructions for use:

- Add company-specific elements to the job posting, including a company overview and job details (e.g., salary, benefits, location).
- Review list of required and preferred skills and their definitions. Adjust as needed.
- Share final draft with a diverse set of employees to gather feedback and spot potential bias.
- Begin sourcing candidates. Add to your company website, distribute to partners, and post with a diverse set of sourcing channels.

# Job Posting Template

## Financial Manager



**This toolkit model is an example of how to structure a skills-based job posting. Everything included in this toolkit can be tailored to each company's own needs.**

### Company Overview

<Please insert a paragraph talking about your company and what makes it unique. Include details that capture the core values, culture, and mission of your company so job seekers understand the environment they will be working in.>

### Job Summary and Responsibilities

Financial managers oversee finance matters for an organization. They manage financial operations such as, assets, liabilities, equity, investments, and cash flow, aiming to maintain the financial health of the company and operative viability. This work may include, evaluating strategic plans from a financial perspective, maintaining financial records for taxation and auditing bodies, and creating annual financial statements.

<Add any additional responsibilities or changes relevant to this role at your company.>

### Example Activities

- Establish and maintain relationships with individual or business customers and provide assistance with problems these customers may encounter.
- Oversee the flow of cash or financial instruments.
- Manage the activities of other financial staff at the organization.
- Review financial reports and find ways to reduce costs.
- Recruit staff members and oversee training programs.
- Evaluate financial data and review or draft budgets.
- Establish procedures for custody or control of assets, records, loan collateral, or securities to ensure safekeeping.
- Communicate with stockholders or other investors to provide information or to raise capital.

# Job Posting Template

## Financial Manager



### Required Skills

#### Required Occupational Skills

- **Evaluate Company Financial Performance:** Ability to evaluate accounts, records, financial statements, and external market information to assess the financial performance of a company and identify opportunities for improvement.
- **Financial Analysis:** Experience assessing the financial possibilities, means, and status of an organization by analyzing financial statements and reports.
- **Financial Forecasting:** Ability to create financial projections by examining historical performance data, such as revenue, cash flow, expenses, and sales; performing fiscal financial management to identify revenue trends and estimated financial conditions.
- **Financial Statements:** Familiarity with creating year-end accounting statements.
- **Accounts Payable:** Understanding and managing balance sheets, payments; expenses and income; checking numbers for accuracy, and managing audits, etc.

#### Required Foundational Skills

- **Customer Service:** Effectively interact verbally or in writing with internal and external parties during day-to-day work, such as sharing financial information, gathering data, or agreeing on a course of action.
- **Active Listening:** Give your full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting.
- **Critical Thinking:** Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.
- **Judgment and Decision Making:** Considering the relative costs and benefits of potential actions to choose the most appropriate one, using technical common sense to reduce the overall impact of decisions.

### Preferred Skills

#### Preferred Occupational Skills

- N/A

#### Preferred Foundational Skills

- **Microsoft Office:** Understand and use multiple software packages and cloud solutions including business productivity suites such as Microsoft Office or Google Docs.
- **Complex Problem Solving:** Identify problems and review relevant information to develop and implement appropriate solutions.

# Job Posting Template

## Financial Manager



**Required Certifications** *Note: Insert additional certifications but only if truly required.*

N/A

### Job Details

**Location:** \_\_\_\_\_

**Department:** \_\_\_\_\_

**Salary / Pay Range:** \_\_\_\_\_

**Benefits:** \_\_\_\_\_

**Full / Part-Time:** \_\_\_\_\_

**Travel Required:** \_\_\_\_\_

**Nights or Weekends:** \_\_\_\_\_

**Remote / In-Person:** \_\_\_\_\_

**Physical Work:** \_\_\_\_\_

**Additional Details:** \_\_\_\_\_

### Inclusivity Statement

<We are committed to creating a diverse and inclusive environment and are proud to be an equal-opportunity employer. All applicants will receive consideration for employment without regard to race, creed, color, national origin, religion, sex (including pregnancy, childbirth, or related medical conditions), gender, gender identity, age, marital status, physical or mental disability, predisposing genetic characteristics, sexual orientation, domestic violence victim status, military status, or veteran's status.>

# Resume Screening Guide

## Why Inclusive, Skills-Based Screening Matters

### Don't overlook the best candidates.

Traditional screening approaches are time-consuming and bias-prone.

Many of your top candidates, especially those from diverse backgrounds and those without a 4-year college degree, never make it to the interview stage.

Inclusive, skills-based screening focuses on whether candidates have the skills necessary to do the job regardless of where those skills were acquired.



### Want to learn more about taking a skills-based approach to screening candidates?

 Check out the Screening section of our [Sourcing & Hiring Playbook](#).

#### Instructions for use:

- Ensure all required skills listed in your job posting are included in the left column of the guide.
- Share the resume screening guide with the team involved in resume reviews. To help protect against bias, where possible have multiple team members from different backgrounds and departments review resumes.
- Use the screening guide to inform which applicants advance to the next round of the hiring process. If using multiple reviewers, discuss any discrepancies between their evaluations.

## Financial Manager

### Instructions for use:

- Use a chart like the one below to track whether a resume contains evidence of required skills.
- Scan through each resume to determine whether the candidate demonstrates the skill, is missing the skill, or if it is unclear.
- Appropriately mark resumes against each skill, and use the chart to compare resumes and help select candidates to interview.
- Some skills are easier to identify in a resume than others. Focus on required skills that you can reasonably expect to identify in a resume.

Identify whether this skill is:	<b>Demonstrated</b>	<b>Missing</b>	<b>Might Have</b>
	Y (or) ✓	X	?

Required Skills To Evaluate:	Candidate / Resume #									
	1	2	3	4	5	6	7	8	9	10
Evaluate Company Financial Performance										
Financial Analysis										
Financial Forecasting										
Financial Statements										
Accounts Payable										
Customer Service										
Active Listening										
Critical Thinking										
Judgment and Decision Making										

*Preferred skills should not be evaluated at the resume screening stage.*

# Interview Guide & Evaluation Rubric



The interview process is one of the points in the recruiting process in which the greatest number of qualified, diverse candidates and candidates without a 4-year college degree are unintentionally screened out as interviewers select candidates most like themselves or those already in the organization.

This process prevents employers from hiring the best talent and adding diversity to the organization.

An inclusive, skills-based interview works to combat “like-me” bias by providing a structured, consistent approach that focuses on the skills new hires need to possess for the role and ensures all candidates are asked the same questions.

Scoring candidates on a consistent 1-5 scale for each skill further ensures interviews are focused on evaluating critical skills.



## Want to learn more about taking a skills-based approach to interviewing candidates?

 Check out the Interview & Selection section of our [Sourcing & Hiring Playbook](#).

### Instructions for use:

- Review the list of required and preferred skills in your job posting. Ensure there is at least one interview question to evaluate each skill.
- Review the list of questions and evaluation rubric in the template. Adjust as necessary.
- Share the interview guide with a diverse set of employees for feedback to help spot bias.
- Ensure all candidates are asked the same questions to reduce bias and make it easier for interviewers to compare candidates. Complete the evaluation rubric during, or immediately following, the interview.

# Interview Guide Template



## Financial Managers

### Instructions for use:

- Each question in this guide is designed to evaluate a specific required skill for the job.
- Take notes as needed for each question and record interview responses.
- Make sure to ask all candidates the same questions to make it easier to compare their abilities.
- Assign a numerical score for each question using the rubric as a guide.

Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Interviewer Name: \_\_\_\_\_ Total Score: \_\_\_\_\_

### Required Skill: **Evaluate Company Financial Performance**

**QUESTION:** Can you describe your experience in analyzing financial performance of a company and identifying areas for improvement?

Rating	Description of Rating
1	<b>Lowest</b> No relevant example provided.
2	Showed knowledge of analyzing financial performance but did not provide an example of having undertaken this.
3	Gave an example of analyzing a company's financial performance, including the steps taken, but no information about providing recommendations on areas for improvement.
4	Gave an example of analyzing a company's financial performance, including the steps taken, and how some areas for improvement were identified.
5	<b>Highest</b> Gave a detailed example of analyzing a company's financial performance, including the steps taken and how specific areas for improvement were identified and communicated.

# Interview Guide Template



## Financial Manager

Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Required Skill: **Financial Analysis**

**QUESTION: Describe a time when you had to conduct a financial analysis of a company. What steps did you take?**

What were the key financial metrics you would consider when assessing a company's financial health and performance? How would you interpret the findings and what recommendations would you provide based on your analysis?

Rating	Description of Rating
1	<b>Lowest</b> Did not provide a relevant example.
2	Provided some steps to evaluate financial performance but lacked detail.
3	Demonstrated knowledge in evaluating financial performance and provided an example but did not speak to interpreting the findings or providing recommendations.
4	Provided overview of various steps taken to evaluate a company's performance and provided some examples of interpreting the findings.
5	<b>Highest</b> Shared an example of analyzing and evaluating financial performance, providing specific detail on the steps taken including interpreting the findings and providing recommendations.

Required Skill: **Financial Forecasting**

**QUESTION: Describe a time when you had to calculate financial forecasts. How did you prioritize the financial demands of departments within a company to ensure financial goals align with overall business objectives?**

Rating	Description of Rating
1	<b>Lowest</b> Demonstrated no knowledge of financial forecasting.
2	Demonstrated some knowledge of financial forecasting but provided limited detail.
3	Showed some knowledge of financial forecasting and experience in examining data, but not in evaluating the needs of departments to align with business goals.
4	Demonstrated financial forecasting knowledge and experience in examining data, evaluated needs of departments, did not demonstrate alignment with overall financial goals.
5	<b>Highest</b> Demonstrated strong financial forecasting knowledge and experience examining data, gave examples of prioritizing the financial demands of departments within a company to ensure financial goals align with overall business objectives.

# Interview Guide Template

## Financial Manager



Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Required Skill: **Financial Statements**

**QUESTION: Describe your experience in analyzing financial statements and identifying key performance indicators for a company.**

Rating	Description of Rating
1	<b>Lowest</b> Candidate failed to provide a relevant response.
2	Described process of analyzing financial statements but provided limited detail.
3	Described process in more detail but was unclear about identifying key performance indicators.
4	Described the process of analyzing financial statements in detail, briefly described how to identify key performance indicators.
5	<b>Highest</b> Demonstrated a good understanding of analyzing financial statements, cited clear examples of identifying key performance indicators for a company.

Required Skill: **Accounts Payable**

**QUESTION: Describe a time when you identified and resolved discrepancies in accounts payable records.**

Rating	Description of Rating
1	<b>Lowest</b> Did not provide a relevant example.
2	Described identifying a discrepancy but did not explain how the issue was resolved.
3	Described relevant situation, some knowledge in accounts payable but did not mention how they addressed it.
4	Described situation showing extensive knowledge in accounts payable providing course of action options but not the solution.
5	<b>Highest</b> Demonstrated extensive knowledge in accounts payable, provided examples of resolutions, and details of execution.

# Interview Guide Template

## Financial Manager



Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Required Skill: **Customer Service**

**QUESTION: Describe a time when you established a relationship and built trust with a customer/client.**

Rating	Description of Rating
1	<b>Lowest</b> Did not describe a relevant event.
2	Described a situation where a relationship was established but not how this was achieved.
3	Demonstrated an understanding of what it takes to establish a relationship and build trust, but not a specific example.
4	Described an example of establishing a relationship with a customer and how trust was built, but no further information on the impact of this relationship.
5	<b>Highest</b> Provided a detailed example of building trust and establishing a relationship with a customer leading to a positive result for the customer and organization.

Required Skill: **Active Listening**

**QUESTION: Explain a time when your listening skills helped you achieve a goal.**

Rating	Description of Rating
1	<b>Lowest</b> Did not give an example of how listening was used to achieve a goal.
2	Gave an example of achieving a goal that did not relate to the skill.
3	Generalized how an individual could use active listening to achieve a goal but did not give a specific example.
4	Demonstrated use of active listening that had positive results but did not provide details of how it helped to achieve a goal.
5	<b>Highest</b> Demonstrated use of active listening to inform a decision that resulted in achieving a goal.

# Interview Guide Template

## Financial Manager



Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Required Skill: **Critical Thinking**

**QUESTION: Provide an example of when something occurred on a project requiring you to take an action that was completely different from the plan and/or assignment. Why? What happened?**

Rating	Description of Rating
1	<b>Lowest</b> Did not provide a relevant example.
2	Provided an example of needing to implement a change but no details of what action was taken.
3	Provided an example of needing to implement a change and the action taken, but not why this action was taken or the impact of this decision.
4	Provided an example of needing to implement a change and the action taken, including why the decision was made, but no details on the impact of this decision.
5	<b>Highest</b> Gave details of having to change course during a project, including specifics of how the decision was made, what steps were taken and the impact of making this decision to on the outcome of the project.

Required Skill: **Judgment and Decision Making**

**QUESTION: Give an example of a situation when you did something at work to solve an unforeseen issue. What was the initial problem and the outcome?**

Rating	Description of Rating
1	<b>Lowest</b> No relevant example provided.
2	Identifies an issue but did not demonstrate any analysis of the problem.
3	Identifies and analyzes an issue but could not show potential solutions.
4	Identifies an issue and demonstrates analysis of options that could resolve the problem. but could not determine the most appropriate action.
5	<b>Highest</b> Identifies an issue, demonstrates analysis of the problem, proposed solutions, and determined the best action to take to resolve the issue.

# Assessment Template



## Financial Manager

### Instructions for use:

- During the final round interview, provide 30 minutes for candidates to complete the following assessment to evaluate skills required for Financial Managers.
- This is an open-ended assessment and allows for evaluating skills that may be hard to assess by answers to interview questions.

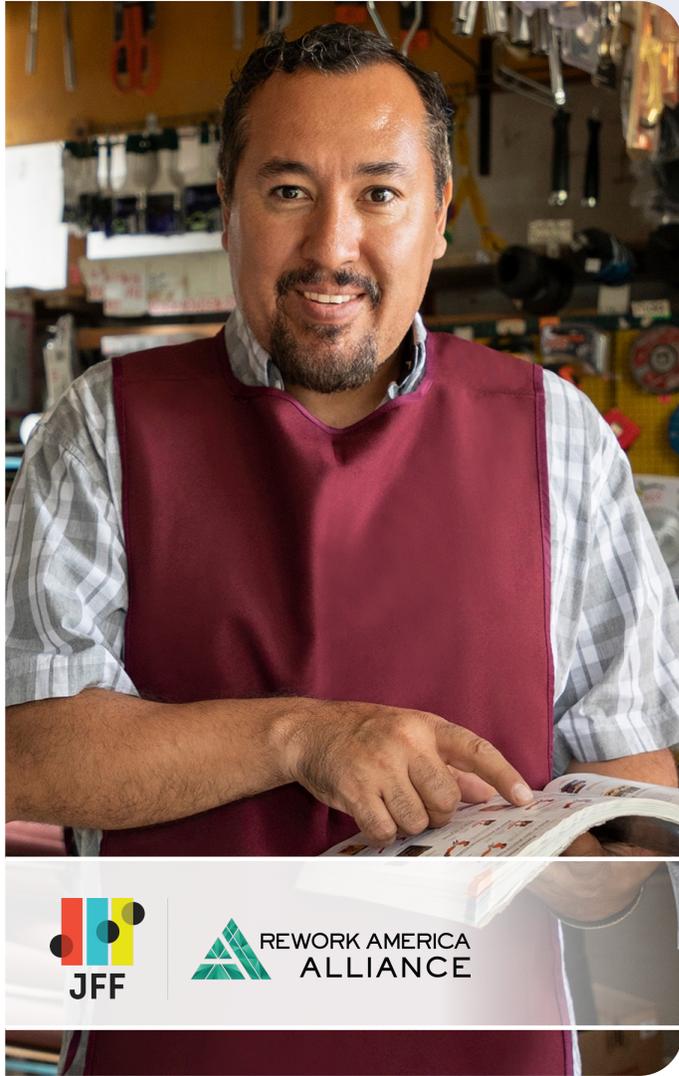
### SUMMARY OF THE PROBLEM:

- In this assessment, you will be given a template of a financial plan.
- Your instructions are to provide a thorough analysis of the financial plan and report any findings/recommendations.

### AS YOU CONSIDER THE ABOVE SITUATION, ANSWER THE FOLLOWING QUESTIONS:

1. Evaluate **FINANCIAL ANALYSIS** skill  
**Did they provide a thorough financial analysis of the given financial plan?**
  
2. Evaluate **FINANCIAL STATEMENTS** skill  
**Within the financial analysis, did they present clear knowledge and evaluated the various financial statements?**
  
3. Evaluate **CRITICAL THINKING** skill  
**Did they compare the strengths/weaknesses of financial plan? Did they provide an appropriate response after analyzing the situation?**
  
4. Evaluate **JUDGMENT AND DECISION-MAKING** skill  
**Did they provide an appropriate recommendation of the course of action based on inferred analysis?**

# Interviewee Selection Tool



## The Decision

**After completing interviews and assessing each candidate’s skills, how do you determine whom to hire?**

Selection conversations are often prone to bias as interviewers describe “gut-feelings” or a level of comfort with candidates who are most similar to themselves.

The comparison tool introduces some structure and objectivity to the process, enabling hiring teams to compare interviewee scores across skill areas.

The tool helps keep selection conversations focused on candidate skills and abilities.



**Want to learn more about taking a skills-based approach to interviewing candidates?**

 Check out the Interview & Selection section of our [Sourcing & Hiring Playbook](#).

### Instructions for use:

- Ensure the skills in the selection tool match the ones outlined in the job posting and interview guide.
- Add the minimum required score for each skill to the first column. This score should be determined in advance and should reflect the team’s capacity to train a new hire in that skill area.
- For each applicant, enter the score(s) they received from each interviewer for each skill.
- Use the notes column to capture additional feedback from interviewers.
- Reference the scores to evaluate and compare candidates and inform selection.

# Interviewee Selection Tool



## Financial Manager

### Instructions for use:

- Use a chart like the one below as a guide to compare applicants during interview and selection process.
- Ensure the skills match the ones outlined in the job posting and interview guide.
- Add the minimum required score for each skill. This score should be determined in advance and should reflect the team's capacity to train a new hire in that skill area.
- For each candidate, enter the score(s) the candidate received for each skill listed from each interviewer
- Use the notes column to capture additional feedback from interviewers.
- Reference the scores to evaluate and compare candidates and inform selection.

Interviewer Name A: \_\_\_\_\_

Interviewer Name B: \_\_\_\_\_

Candidate Name #1: \_\_\_\_\_

Candidate Name #2: \_\_\_\_\_

Candidate Name #3: \_\_\_\_\_

Skills To Evaluate:	Minimum Score*	Candidate / Resume #					
		1		2		3	
		A	B	A	B	A	B
Financial Analysis							
Financial Forecasting							
Financial Statements							
Accounts Payable							
Customer Service							
Active Listening							
Critical Thinking							
Judgment and Decision Making							
Microsoft Office							
Complex Problem Solving							
<b>Total Score</b>							

\*Minimum score required (determine prior to interviews)

# Onboarding Plan



## Skills-Based Strategies Enable Customization and Training

While traditional onboarding plans are often one-size-fits-all initiatives that focus on compliance and HR, a skills-based strategy enables much more customization and training.

An effective skills-based hiring strategy provides you with a lot of information on the abilities a new hire currently possesses and needs to learn to perform in their new role.

This information enables you to tailor their onboarding plan to get them up to speed in areas identified as potential gaps.

**Want to learn more about taking an inclusive, skills-based approach to onboarding candidates?**

 Check out the Onboarding section of our [Sourcing & Hiring Playbook](#).

### Instructions for use:

- Ensure that all required and preferred skills from your job posting are included in the onboarding plan. The goal should be to get all new hires up to a baseline level of skill as quickly as possible to ensure they can effectively contribute.
- Review the onboarding plan with hiring managers. Adjust activities as needed based on training resources available and staff capacity. Make sure to build in training opportunities (informal on-the-job and/or structured training) for each skill.
- Work with managers to customize the onboarding plan to each new hire, referencing their interview and assessment evaluation forms to identify areas of relative weakness.
- Spread out training and onboarding activities to avoid overwhelming new hires with too many activities in the first day or week. Align training with job responsibilities to improve retention.

# Example Onboarding Activities



## Financial Manager

Examples of skills-based onboarding activities for this role that align with the required and preferred skills included in the job posting. Activities should address areas of need identified during the hiring process and scheduled during the first 60 days of employment.

Required Occupational Skills	
Skill	Activity
Financial Analysis	Explanation of company strategies/expectations regarding job.
Financial Forecasting	Employee is walked through current forecasting measures and protocols that currently exist to provide a more accurate response.
Financial Statements	Explanation of company strategies/expectations regarding job.
Accounts Payable	Check in with supervisor, making sure employee is adhering to instructions and protocols.

Required Foundational Skills	
Skill	Activity
Customer Service	Coaching from experienced peers on successful approaches to managing relationships with coworkers/clients.
Active Listening	Role-playing scenarios with experienced peers to evaluate active listening skills as they relate to role.
Critical Thinking	Review outcomes of team's performance and brainstorm activities to improve problem-solving skills.
Judgment and Decision Making	Access to relevant learning materials on better decision-making.

Preferred Occupational Skills	
Skill	Activity
N/A	N/A

Preferred Foundational Skills	
Skill	Activity
Microsoft Office	Introduction to Microsoft office, provide any needed support/guidance, and answer any questions.
Complex Problem Solving	Discussion with peers of potential problems that may arise within the job.

# Example Onboarding Table

## Financial Managers



	Day 1	Week 1	Week 2	30 Days	60 Days
Financial Analysis					
Financial Forecasting					
Financial Statements					
Accounts Payable					
Customer Service					
Active Listening					
Critical Thinking					
Judgment and Decision Making					
Microsoft Office					
Complex Problem Solving					