Background & Reference Checking

The Ultimate Guide

Introduction

Welcome to our comprehensive guide on how to effectively reference check your new Salesforce hires. As a hiring manager or HR personnel at a small startup business, ensuring that you bring in the right talent is crucial for the success of your Salesforce projects. By following these steps, you can streamline your hiring process and make more informed decisions when selecting candidates.

Chapter 1: Importance of Having a Written Job Description

A well-crafted job description serves as a roadmap, guiding both the hiring manager and candidates through the recruitment process. It clarifies expectations, outlines essential responsibilities, and defines the qualifications required for the role. By establishing clear parameters from the outset, a written job description can streamline the recruitment process, supporting candidate evaluation, and ensure compliance with legal regulations. Additionally, it enhances the candidate experience by providing transparency and helping individuals assess their fitness for the position.

- **Clarifies Expectations:** A written job description outlines the responsibilities, qualifications, and expectations for the role. It provides clarity to both the hiring manager and the candidate about what the job entails, helping to align expectations from the outset.
- **Guides Recruitment Process:** With a clear job description in hand, you can effectively advertise the job vacancy, target the right candidates, and streamline the recruitment process. It serves as a guide for drafting job postings and screening applicants based on their suitability for the role.
- **Supports Candidate Evaluation:** Having a written job description allows you to assess candidates based on how well their skills, experience, and qualifications match the requirements of the role. It provides a framework for conducting interviews and evaluating candidates' suitability for the position.
- **Facilitates Legal Compliance:** A written job description helps ensure compliance with employment laws and regulations by clearly stating the essential job functions, qualifications, and any legal requirements. It serves as a reference point to ensure fairness and consistency in the hiring process.

- **Enhances Candidate Experience:** Providing a detailed job description demonstrates professionalism and respect for candidates' time and effort. It allows candidates to self-assess their fit for the role and make informed decisions about whether to apply, ultimately enhancing their experience with your company.

Chapter 2: Obtaining a Candidates CV
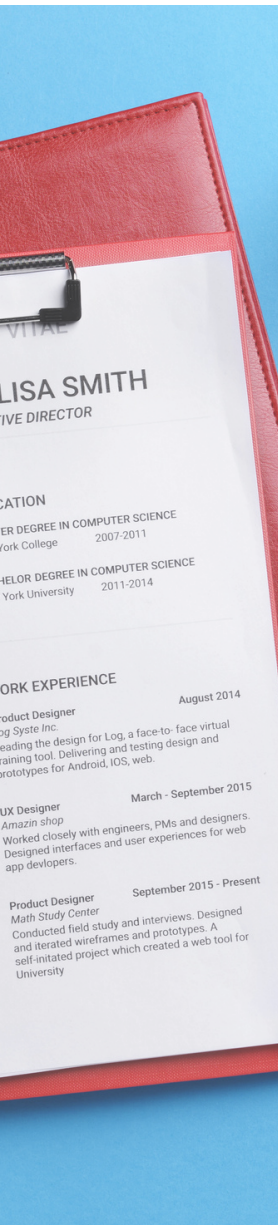
Obtaining the candidate's CV is a fundamental step in the hiring process, offering valuable insights into their professional background, skills, and qualifications. A CV, or curriculum vitae, provides a comprehensive overview of the candidate's education, work experience, achievements, and relevant certifications. By requesting a copy of the candidate's CV, hiring managers gain access to essential information that helps assess the candidate's suitability for the role and compatibility with the organisation's needs. In this guide, we'll explore the significance of obtaining the candidate's CV, highlighting how it serves as a vital tool for evaluating candidates and making informed hiring decisions.

- **Assesses Qualifications:** A candidate's CV provides a comprehensive overview of their education, work experience, skills, and accomplishments. Reviewing the CV allows you to assess whether the candidate meets the minimum qualifications and requirements specified in the job description.

- **Identifies Relevant Experience:** By examining the candidate's work history and accomplishments listed in their CV, you can identify relevant experience that aligns with the needs of the role. Look for specific examples of skills or achievements that demonstrate their suitability for the position.

- **Validates Information:** Obtaining a copy of the candidate's CV allows you to verify the accuracy of the information provided during the application process. You can cross-reference details such as employment history, educational credentials, and certifications to ensure they are truthful and accurate.

Chapter 2: Obtaining a Candidates CV

- **Tailors Interview Questions:** The candidate's CV can serve as a starting point for crafting interview questions that delve deeper into their relevant experience, skills, and accomplishments. Use the CV as a reference point to explore specific aspects of their background during the interview process.

- **Establishes Communication:** Requesting a candidate's CV signals your interest in their background and qualifications, initiating communication and engagement early in the recruitment process. It provides an opportunity for candidates to showcase their strengths and highlight why they are a good fit for the role.

Chapter 3: Identifying What to Check

Identifying the background information to check is a critical step in the hiring process, ensuring thorough evaluation of candidates' qualifications and suitability for the role. Key background information to verify includes:

- **Work experience:** Conduct thorough background checks to verify candidates' employment history, education credentials, certifications, and any relevant professional licenses. Utilise reputable background screening services to ensure accuracy and compliance with data privacy regulations.

- **Professional / education certifications:** Verify candidates' Salesforce certifications through the official Salesforce certification verification portal. Confirm the validity of certifications claimed by candidates and ensure they align with the role requirements.

- **Contact references:** Additionally, conducting reference checks with previous employers or colleagues can provide valuable insights into a candidate's past performance, work ethic, and interpersonal skills. Reach out to references provided by the candidates, to ask specific questions related to the candidate's performance, technical skills, teamwork, and reliability. Inquire about their experience working with the candidate and any notable achievements.

- **Verify Project Experience:** Validate candidates' project experience by discussing their involvement in past Salesforce implementations, customisations, or integrations. Request details about their role, responsibilities, challenges faced, and outcomes achieved. Cross-reference this information with their CV and interview responses.

Chapter 3: Identifying What to Check

- **Assess Cultural Fit:** Evaluate candidates' cultural fit within your organisation by assessing their values, work ethic, collaboration style, and adaptability. Consider how well they align with your company's mission, vision, and team dynamics.

- **Identification:** Always collect copies of photographic identity documents, such as driving licence or passports to establish the candidates identity. Ensure that these are checked against the individual being interviewed, regardless of whether it is an in-person interview or a video call. Be wary of making offers of employment based on telephone interviews only.

- **Work visa:** Verification of work visa status, where applicable, is essential to ensure compliance with immigration laws.

By systematically verifying these background details, hiring managers can make informed decisions and mitigate risks associated with hiring unqualified or unsuitable candidates.

Chapter 4: Telephone or Written References

Limitations of Written References:

While written references can be a valuable component of the hiring process, they often have limitations that can restrict the depth of information provided. Here are several reasons why written references may not always offer substantial insights beyond employment dates and job titles:

- **Legal Concerns:** Many companies have strict policies regarding the information they can disclose about former employees to avoid potential legal liabilities. As a result, references may adhere to providing only factual details such as employment dates and job titles to avoid any risk of defamation or privacy breaches.

- **Lack of Context:** Written references often lack the context necessary to fully understand a candidate's performance and capabilities. They may not provide insight into the specific projects or tasks the candidate was involved in, the challenges they faced, or the contributions they made to the organisation.

- **Generalised Content:** Due to time constraints or generic templates, written references may contain generic or boilerplate language that does not offer meaningful insights into the candidate's skills, work ethic, or suitability for the role. Such references may focus on praising the candidate without providing concrete examples or evidence to support their claims.

- **Bias and Subjectivity:** Written references can be influenced by personal biases or subjective opinions, leading to either overly positive or negative assessments of the candidate. Employers may hesitate to provide candid feedback in writing, fearing repercussions or strained relationships with former employees.

- **Incomplete Picture:** Written references often provide only one perspective on the candidate's professional background, typically from a former supervisor or manager. This limited viewpoint may not capture the candidate's full range of skills, strengths, and experiences, leading to an incomplete picture for the hiring manager.

Chapter 4: Telephone or Written References

- **Reluctance to Provide Detail:** Some employers may be hesitant to divulge detailed information about former employees in written references due to confidentiality concerns or internal policies. They may opt to provide minimal information to avoid potential conflicts or misunderstandings.

- **Verification Challenges:** It can be challenging to verify the authenticity and credibility of written references, as they may lack verifiable contact information or sufficient detail to confirm their validity. Without the opportunity for direct dialogue or follow-up questions, written references may be less reliable as sources of information.

- **Emphasis on Formality:** Written references often prioritise formality and professionalism, which can limit the candidness and specificity of the feedback provided. Employers may feel constrained by the need to adhere to professional standards and conventions, resulting in superficial or sanitised recommendations.

Given these limitations, it's essential for hiring managers to supplement written references with other forms of assessment, such as verbal reference checks, interviews, skills assessments, and portfolio reviews. By leveraging multiple sources of information, employers can gain a more comprehensive understanding of a candidate's suitability for the role and make informed hiring decisions accordingly.

Chapter 4: Telephone or Written References

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Verbal references can be more beneficial than written references in several ways. Firstly, verbal communication allows for a more nuanced exchange of information, enabling hiring managers to ask follow-up questions and delve deeper into a candidate's background and experience. This facilitates a clearer understanding of the candidate's strengths, weaknesses, and overall fit for the role.

Additionally, verbal references provide an opportunity for real-time feedback, allowing referees to provide candid assessments that may not be captured in a written format. Moreover, verbal references offer a personal touch, fostering rapport and trust between the referee and the hiring manager.

By leveraging verbal references alongside written documentation, employers can gain a more comprehensive and insightful perspective on candidates, ultimately aiding in making well-informed hiring decisions.

Questions to Ask:

1. Can you confirm the candidate's employment dates and job title during their tenure at your company?
2. What were the candidate's main responsibilities in their role?
3. How did the candidate perform in their day-to-day tasks?
4. Can you describe the candidate's communication and collaboration skills?
5. Did the candidate demonstrate proficiency in Salesforce tools and platforms? If so, which ones?
6. How did the candidate handle challenges or difficult situations in their role?
7. Can you provide an example of a successful project or achievement the candidate was involved in?
8. Would you rehire the candidate if given the opportunity? Why or why not?

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Chapter 5: Checking Visa Status (for UK Job Market)

In the UK job market, verifying a candidate's work visa status is crucial to ensure compliance with immigration laws and regulations. Here are steps you can take to check and verify a candidate's work visa status:

Understanding Visa Types: Firstly, familiarise yourself with the different types of work visas available in the UK. These may include the Skilled Work Visa (which replaced the Tier 2 - General visa) for skilled workers sponsored by an employer, an International Agreement Visa (which replaced the Tier 5 - Temporary Worker visa) for individuals coming to the UK for temporary work, or other visa categories depending on the candidate's circumstances.

Request Documentation: When making a job offer to a candidate, include a request for documentation regarding their right to work in the UK. This may include asking for a copy of their visa, residence permit, or any other relevant documentation.

Verify Visa Validity: Check the validity dates on the candidate's visa to ensure it covers the duration of their intended employment with your company. Be aware of any restrictions or conditions attached to the visa, such as limitations on working hours or specific job roles. Immigration status checks can be carried out online, if a candidate provides you with their Share Code.

Review Sponsorship Requirements: If the candidate requires sponsorship for a work visa, familiarise yourself with the sponsorship process and requirements set out by the UK Visas and Immigration (UKVI). Ensure that your company is eligible and willing to sponsor the candidate if necessary.

Consult Legal Experts: If you are unsure about the visa verification process or have any concerns about a candidate's immigration status, consider seeking advice from legal experts specialising in immigration law. They can provide guidance on compliance requirements and help navigate any complex visa issues.

Keep Records: Maintain accurate records of the visa verification process, including copies of any documentation provided by the candidate or online visa checks. This documentation will serve as evidence of your company's compliance with immigration laws in case of any audits or inquiries.

Chapter 5: Checking Visa Status (for UK Job Market)

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Communicate with the Candidate: Openly communicate with the candidate about the visa verification process and any requirements or documents they need to provide. Clarify any questions or concerns they may have regarding their work visa status and ensure transparency throughout the hiring process.

By following these steps, you can effectively check and verify a candidate's work visa status in the UK job market, ensuring compliance with immigration laws and regulations while making informed hiring decisions for your startup in the Salesforce ecosystem.

Chapter 6: Be Vigilant for Red Flags

During the background and reference check process, it's crucial to remain vigilant for any red flags that may indicate potential issues with a candidate's background or qualifications. These red flags can serve as warning signs that warrant further investigation and consideration before making a hiring decision. Here are some examples of red flags you might encounter:

- **Discrepancies in Employment History:** Be wary of inconsistencies in a candidate's employment history, such as unexplained gaps in employment, frequent job changes without clear progression, or discrepancies in job titles and responsibilities across different roles.

- Example: A candidate claims to have worked at a previous company for three years, but when contacting the employer for verification, you discover that they only worked there for six months.

- **Negative Feedback from Previous Employers:** Pay attention to any negative feedback or concerns raised by previous employers or colleagues during reference checks. This could include comments about poor performance, attitude issues, or difficulty working with others.

- Example: A former manager expresses concerns about the candidate's inability to meet deadlines and work effectively within a team, citing instances of conflict with coworkers.

- **Inconsistencies in Qualifications:** Verify the accuracy of the candidate's educational credentials, certifications, and professional qualifications. Look out for discrepancies or discrepancies between what the candidate claims and the information provided by educational institutions or certification bodies.

- Example: The candidate lists a degree from a prestigious university on their CV, but upon verification, it is discovered that they attended the university but did not complete the degree program as stated.

Chapter 6: Be Vigilant for Red Flags

- **Unexplained Gaps or Inconsistencies in the CV:** Investigate any unexplained gaps or inconsistencies in the candidate's CV, such as periods of unemployment or abrupt changes in career paths. These gaps may raise questions about the candidate's reliability or honesty.

- Example: The candidate's CV shows a two-year gap in employment history with no explanation provided for the reason behind the hiatus.

- **Lack of Professional References:** Be cautious if a candidate is unable to provide professional references or if the references provided are vague or unresponsive. A reluctance to provide references may indicate a lack of positive relationships or concerns about the candidate's performance.

- Example: The candidate hesitates to provide references from previous supervisors or colleagues, citing confidentiality agreements or claiming they are no longer in touch with former employers.

By remaining alert for these red flags and conducting thorough investigations when they arise, hiring managers can mitigate risks and make more informed decisions when selecting candidates for roles within their organisation.

Chapter 7: Document Findings

Once you've completed background and reference checks for candidates, it's essential to meticulously document all your findings. Keeping detailed records of these findings serves several important purposes and ensures transparency and accountability throughout the hiring process. Here's why documenting your findings is crucial:

Compliance and Due Diligence: Documenting your findings demonstrates that you've conducted due diligence and complied with legal and regulatory requirements. It provides a clear record of the steps you've taken to verify a candidate's background and qualifications, which can be crucial in case of audits or disputes.

Evidence for Decision-Making: Detailed documentation serves as evidence to support your hiring decisions. By recording the results of background and reference checks, you can justify why you chose to move forward with certain candidates or reject others based on their qualifications and suitability for the role.

Chapter 7: Document Findings

→ **Consistency and Fairness:** Consistent documentation ensures fairness and impartiality in the hiring process. It allows you to compare candidates objectively and make decisions based on standardised criteria, rather than relying on subjective impressions or biases.

Risk Mitigation: Documenting findings helps mitigate risks associated with hiring decisions. If issues or discrepancies arise later on, you have a record of the information you relied upon when making the decision. This can protect your organisation from potential legal or reputational risks.

Future Reference: Keeping thorough records of background and reference checks can be valuable for future reference. If the candidate is hired, these documents can serve as a reference point for onboarding and performance evaluations. If the candidate is not hired, the documentation can inform future hiring decisions and prevent the reevaluation of the same candidate for similar roles.

Chapter 7: Document Findings

Best Practices for Documentation:

- Maintain a centralised system for storing and organising documents related to background and reference checks.
- Clearly label and date each document to ensure accuracy and easy retrieval.
- Include the names and contact information of individuals contacted for references, as well as the dates and outcomes of these conversations.
- Keep copies of any verification of education, certifications, or work history obtained during the background check process.
- Ensure compliance with data protection regulations by securely storing sensitive information and limiting access to authorised personnel only.

By diligently documenting your findings from background and reference checks, you can enhance transparency, accountability, and compliance in the hiring process, ultimately supporting better decision-making and reducing risks for your organisation.

By following these steps, you can conduct thorough background and reference checks for Salesforce hires, helping you build a strong and capable team for your startup in the Salesforce ecosystem. Remember, investing time and effort in the hiring process upfront can save you from potential headaches down the line.

About Us

Growing Salesforce teams since 2007.

Resource On Demand Limited, is Europe's first specialist Salesforce recruitment company, and has a rich history of finding both permanent and contract talent across the UK, Europe and beyond.

We partner with Salesforce partners, ISVs and customers of all shapes and sizes across all industry sectors, and pride ourselves on offering bespoke, flexible recruitment services to suit all budgets and growth ambitions.

To understand how we can help your business attract and retain top Salesforce talent, feel free to reach out to us at rod@resourceondemand.com.