Agile Hiring

Excerpt

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Chapter 1

Foundations

This chapter presents the foundations upon which the rest of the book is built. The first thing to understand is why you should invest effort improving your hiring skills. Next, I will explain how hiring principles create a sustaining fabric of consistency across an organization.

I present a simple hiring process and name some hiring roles, so that I can describe the hiring activities in a consistent fashion. I will cover a few "perspective building" topics such as cost management, values, behavioral traits, and a fun little metaphor, that underpin my approach to hiring. Finally, I will show how tracking candidates, and your process, provide support for continuous improvement.

1.1   Hiring as a core competence

A key premise of this book is that hiring is one of the most important things a software organization does. Every good hire accelerates your organization; every poor hire is a drag on your organization.

People underrate the negative effect of poor hiring. Conventional wisdom says that a good team can absorb a weak member and still perform well. But recent research shows that this is not true; one bad apple *can* ruin the whole barrel.[1]

If you are only able to hire one person, you'd better make it count. If you are hiring a bunch, you can bring down an entire company with bad hiring—or totally renew a weak organization with great hiring.

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[1]Felps, Mitchell, and Byington, "How, when, and why bad apples spoil the barrel: Negative group members and dysfunctional groups." [WF]

Have you ever tried to hire into an organization that is less than stellar? You probably found it difficult to hire top talent. One possible reason is that the mature developer has a sixth sense in detecting mediocrity. Experienced professionals can size up an environment and detect good or bad smells.

Every hire adjusts the future of your organization. So hire well.

Strive to hire the best

Every new employee puts a drag on the organization when they join. The best developers will get up to speed quickly and flip the drag into a pull. They don't require nearly as much mentoring, training, or handholding as less experienced developers.

The best developers have a range of experience different from those of the team members they join. The diversity they bring will expand the capabilities of the team. Often the best developers have interesting hobbies or interests that will enrich the social environment they work in.

The best developers will require some mentoring, but before long, they will be mentoring others. The best developers have leadership skills, whether it is pure people leadership or some other form of technical leadership.

The best developers understand the importance of filling roles and respecting boundaries. They have the maturity to follow when appropriate, and the courage to lead when necessary.

The best developers learn quickly and are able to adapt to new situations while maintaining high productivity. They have a can-do attitude that is tempered by a clear sense of reality. They can evaluate the forces in a situation and use good judgment in making sometimes-difficult decisions.

The best developers are strong communicators and highly collaborative. Software development today demands that people work together and communicate intentions, expectations, and concerns. It is no longer sufficient to just be a *propeller head*.

The best developers will be creating the leadership supply your company will rely on in the future. They will bring a network you can tap into for information and future hires. The best developers are interested in long-term employment and continuous improvement.

You want to hire the best developers.

Prefer full-time employees

If your company views software as a core competence, then full-time employees are preferable. If your organization is planning on its software (or itself) being around for any length of time, you probably should prefer full-time hires to contractors or outsourcing.

Every person who works on your code carries around critical knowledge in his or her head that isn't written down anywhere, or if it is, it's probably out of date or isn't being read. The longer that person works with your software and systems, the more value you have locked in their head.

As your software matures, the developers who matured with it are the ones who will be able to fix it, refactor it, keep it running smoothly, and replace it when necessary. When a new hire joins the team, the veterans will be able to help convert the newcomer into a seasoned player.

When a developer leaves your company, you lose all that valuable information. Sure, you may be able to do a last ditch "information transfer" but mind-meld technology blew up with the planet Vulcan so you won't likely get good results.

Your best bet is to hire full-time employees and do everything reasonable to keep them as long as possible.

1.2   Promoting consistency with hiring principles

When many people are participating in the hiring process, it is difficult to maintain consistency in hiring. An organization should do everything it can to keep participants on the same page.

One fundamental way to promote consistency is to develop and communicate a set of hiring principles. When people are unsure how to handle a situation, they can turn to the principles for guidance.

Every organization should develop its own hiring principles, but here is a set that is an excellent start:

Always be respectful of the candidate. How a company treats its candidates is an indicator of what the work environment is going to be like. How you treat a candidate is a reflection on you; it could be awkward to later work with the mistreated candidate. One day that candidate may be your boss! By showing respect, you put your employer and yourself in the best light.

Always be on time. Being on time is a reflection of the company culture and is another way to respect the candidate. Being late will make the candidate feel unimportant and will trigger doubt about why someone is so busy they can't even be on time for something as important as an interview. Sure, the interview is important to the candidate, but it is also one of the most important things you do for your company. If you are late, apologize with an explanation and an offer to reschedule if the length of the interview is compromised. Empathize with the candidate; this interview is very important to them.

Be prepared. Interviewers must be prepared to conduct a high-quality interview. The interviewer should know the job descriptions. She should have reviewed the résumé, other candidate information, and all interviewer comments, and have developed a personal interview plan. Preparation significantly improves the chances of a good hire, avoids wasted time, and leaves a positive impression with the candidate.

Value the candidate's behavioral qualifications. Behavioral traits are as important as technical ability. The scope of projects today demands strong communication and collaboration skills; the days of the lone geek in the dark office are long gone. Obnoxious tech superstars need not be tolerated; mousey, shoe-staring introverts have no place in a collaborative environment. Hire for quality behaviors that align with your organizational values. This will pay off richly in the long run.

Always consider and value leadership potential. Every employee should be a leader. There are many leadership opportunities beyond running a team or organization. Even with an eye toward leadership, few will rise up to take the reins of a team or group of teams. Hire those who

demonstrate leadership to build up your future leadership supply. The faster your organization is growing, the more important this becomes.

> ## Can too many cooks spoil the broth?
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> Will too many people aspiring to leadership create conflict and lead to attrition? The fear is that too many people vying for a small number of leadership positions will leave your best people disaffected. So how much leadership supply do you need?
>
> There are several important factors. The first is the rate at which your organization generates new leadership positions through growth (if new positions are being generated through attrition, your problem isn't hiring, it's retention). The second factor is the size and shape of your potential leadership pool. You ought to always know who is aspiring for leadership and where they are in their development.
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> Thirdly, you will always need more leaders than you have. Too few will turn out to be good people leaders. Those who aspire for leadership but are unable to lead people well may need to settle for other types of leadership roles. A good work environment provides many leadership opportunities. Your aspiring leaders will be willing to wait for opportunities if your organization is a satisfying place to work.

Persistently and politely pursue answers from the candidate. When interviewing, do not settle for vague answers from candidates. If the answer to the question is important, politely pursue a more complete answer. You are not trying to get the answer you want to hear. You are trying to get enough information to understand whether the candidate will be a good fit.

It is surprising how evasive a candidate can be, but you deserve the answer so do not settle. The candidate may be avoiding telling the truth because they were untruthful on their résumé. The candidate may simply be afraid to admit ignorance. In either case, not answering the question—even if the answer should be "I don't know"—is unacceptable. Often when your team is discussing the interview later, someone will say, "I don't know the answer because the candidate was vague." That means someone didn't pursue the answer persistently.

Do developers make bad leaders?

Being a software professional has nothing to do with ability to lead. Two things make good leaders: behaviors and skills. If you focus on behaviors in your hiring of developers, they will be predisposed for leadership success. The hired candidate may walk in the door with the skills necessary to lead or not. If not, skills are easy to acquire through training and mentoring. People can acquire or modify behaviors, but it is much harder than skill development. Hire for behaviors and train the leadership skills.

Every interview is different; be creative. Every interview truly is different. Most will pose no major challenges, but many will. Be creative when dealing with strange situations. Hiring is not a predictable process; it demands adaptation and quick thinking as you keep the principles in mind. Don't be afraid to ask for help from your peers.

Take ownership of your needs, opinions, and decisions. Hiring is a collaborative process. The hiring participants have different needs, opinions, and perspectives. It is easy to be swayed by others in the process, so try to form your own opinions based on sound observations. If you feel compelled to change your mind after hearing what others think, question your motives before you question your opinions. Hold true to your observations, but not stubbornly so. Honest re-evaluation of your decisions is fine, but foolish supplication to the hiring guru's opinion is not. The hiring guru might have a point; just be sure you agree before changing your mind.

Respect the opinions of others. Likewise, respect the opinions of others. It is not your job to convince them of your views. Instead, state your opinion and give your reasons. If they are compelling, people might agree. If they don't, let it go. It is better to lose a candidate than to ruin a relationship with a workmate.

Leave the candidate with a positive impression of your company. Whether you make an offer or not, treat every candidate as if you intend to. You have succeeded if the candidate leaves wanting a job. The person you pass on today may return with more qualifications in the future. That

person has a network, and the impression your company leaves can have a surprising influence on your ability to hire. Word gets around fast in the development community. Your company could develop a great reputation or a poor reputation even to the point where recruiters won't work with you.

Wait for good candidates. Be patient when hiring; you don't need to hire the first person that comes through the door. If you are not seeing many qualified candidates, rather than settle, focus on getting more candidates. There are always good people to hire, so wait for them.

Hire for the long-term. The average tenure of a software developer is only a few years, but good companies are able to keep their talented employees for much longer. Always hire with the intention that you want this candidate as an employee for a long time. A short-term view may lead to cynicism or compromise in the hiring process.

1.3   Hiring is like dating

Although it may a bit sound strange, a dating metaphor works well for hiring. But before getting all mushy, I must first construct a simple hiring process. Then I will discuss cost, values, and behavioral traits—these are important in dating too!

Hiring process overview

Although this book does not cover the entire hiring process, having a process skeleton in mind enables easier presentation of other hiring concepts. Think of the hiring process as a pipeline where candidate résumés come in and new hires come out. Along the way, you filter undesirable candidates out of the pipeline until only the best are left. Here are the steps of a basic process:

1. Accept résumés and log them for tracking and distribution.

2. Have individuals review résumés and recommend whether to phone screen or not.

3. Close out candidates who are not to be phone screened and schedule phone screens for the desired candidates.

4. Conduct phone screens; recommend whether or not to invite on-site.

5. Close out candidates who are not to be brought on site and inform them.

6. Schedule on-site interviews for desired candidates, making travel arrangements if necessary.

7. Conduct on-site interviews; recommend whether or not to make an offer.

8. Close out candidates to whom an offer will not be made and inform them.

9. Make offers to desired candidates; negotiate terms if necessary.

10. Complete the company hiring processes, including visa and relocation, necessary to bring the new hires on-board.

This simple process is sufficient for most organizations and it is easy to augment with additional details.

Cost management

One benefit of multi-phased interviews (review résumé, phone interview, on-site interview) is cost management. By eliminating unqualified candidates as early as possible, you save the wasted expense of later process phases.

As an example, consider a situation in which five teams have openings. A résumé review that takes about ten minutes for each of the hiring interviewers and a technical interviewer will have a direct cost in salary and lost productivity of about $100 per candidate, plus a small indirect cost for the time spent by others who depend on process participants. A one-hour phone interview with three interviewers will have a direct cost of about $200 and an indirect cost of around $100. A typical on-site interview involving the CTO, a pair of architects, the five hiring interviewers, and lunch could easily exceed $1000 in direct cost and several hundred in indirect cost.

Clearly, the earlier in the process an undesirable candidate can be detected and eliminated, the better. This is why it is so important to become a good résumé reviewer. There is even greater value in cash and productivity by limiting on-site interviews to only those candidates you are likely to hire.

Other cost factors should also be considered, including visa processing, relocation, and recruiting costs. Keep in mind that if you spent $10,000—or even $20,000—on these additional costs, this is still only about 10 to 25 percent of one year's salary. If your strategy is to keep employees a long time, then this cost will amortize and not be significant compared to the value of having a productive employee.

Organizational values

Hire people who exhibit values and behaviors consistent with your organizational values. Misfits will weaken the organization and be uncomfortable. It is the hiring company that is responsible for the fit, not the candidate, so value match should be a core part of your hiring process. Although the candidate is looking for a fit too, you represent your organization and have the knowledge to judge whether the candidate will mesh with your organizational values; the candidate does not.

At this point, you may be thinking, "Gee, I have no idea what our organizational values are." Chances are good that if you don't know your organizational or company values, there aren't any. If there are, any executive should be able to guide you to them, so ask around. If not, then your company has a great opportunity to establish values, set staff expectations, and begin to measure new hires against those values.

Organizational values need not reflect the way things are; they can be the values that leaders hope to realize. An organization will not realize those values unless they are defined and communicated.

From a hiring perspective, every new employee that exemplifies organizational values brings the organization, as a whole, closer to the desired value system. You can think of hiring, therefore, as a way to shape your organizational values!

 Hire to become the organization you want to be.

Behavioral traits

I mentioned previously that communication, collaboration, and leadership are key behaviors to seek in candidates. Like values, behaviors should be established by the organization as most important.

Make sure everyone in the hiring process understands what behaviors to look for during the interview process. I have included a sample list of valuable behaviors in Appendix A.

The dating metaphor

If you combine the notions of the pipeline, values, and behaviors, you can imagine that hiring is like dating with the eventual intent of "marrying" candidates (putting aside polygamy in the metaphor). As you date, you start with a little information (the résumé) and slowly escalate the relationship: If the person interests you, you starting going to dinner, hiking, and movies (the phone screen).

As the relationship escalates further, you spend more time together. You meet the folks, talk politics and religion, and discuss the possibility of a future together (the on-site). If things are still good, a proposal is made (the offer) and hopefully accepted.

This analogy is helpful not only in reminding everyone that it takes time to get to know someone, but also that you are looking for a long-term relationship. You don't want to waste time and money on someone who isn't going to work out, so you eliminate them as soon as possible. Only those who really mesh with your organization are worthy of an offer.

1.4   Roles

For the purposes of this book and the lightweight process described in the previous section, it is helpful to define a set of participant roles. The roles are used in the descriptions throughout the book. Often an individual will take on multiple roles in the hiring process.

Process coordinator Coordinates most phases of the interview process: makes appointments, sets schedules, distributes résumés, invites attendees, and follows up with the candidates or recruiters.

Résumé reviewer Reviews résumés to determine if any candidates should be invited for a phone interview based on the job openings and the stated qualifications of the candidate. Identifies areas of interest, concern, and potential questioning paths to follow in other phases of the interview process.

Lead phone interviewer Leads the phone interview by doing most of the speaking and coordinating with the other phone interviewers. The goal of the lead phone interviewer is to conduct an orderly interview by promoting the general principles.

Hiring interviewer Has one or more openings to fill and participates in a phone or on-site interview to fill them. Responsible for identifying the degree to which a candidate qualifies for the openings.

Technical interviewer Participates in phone or on-site interviews and is specifically focused on evaluating the candidate's technical skills as they pertain to specific openings. All interviewers participate in this role to some degree, but it may be helpful to identify a technically focused role.

Behavioral interviewer Responsible for evaluating the candidate's behavioral strengths and weaknesses. All interviewers should fulfill this role, but it may be helpful to have a role focused on this area.

Opener Contact point for the candidate arriving on-site. The opener is responsible for bringing the candidate into the on-site interview process, which may involve meeting the candidate in the lobby and escorting the candidate to the first interview session.

Closer The final interviewer, who fields any remaining questions. The closer discusses salary expectations, benefits, *etc.* The closer finishes the process and escorts the candidate off the premises. If the candidate is from out of town, the closer ensures transportation is ready and the candidate has time to catch the return flight.

Other roles can be defined as they make sense, but it is important the right people fill the roles. Although the process coordinator, opener, and closer can be non-technical, all other roles are technical.

It is best to have the technical roles performed by leaders. Certainly the team leads fill the Hiring Interviewer role. It is a good idea to have directors involved, and even more senior management. The key players, though, are the team leads, because they have the greatest vested interest in hiring the right people.

Middle and senior management should respect the decisions of the team and overrule only rarely and judiciously. Your strongest technologists should be in the role of Technical Interviewer, but only if they are also strong interviewers. Technical interviews are very stressful on most candidates. It requires skill to get a good read on the candidate despite their stress level.

The Closer is often a senior manager who can discuss salary matters as well as company-related questions the leads may not be able to answer. Often having a more senior person do the close will leave a positive impression on the candidate.

1.5   Tracking

It is important that all phases of the process be recorded in a tracking system. Even more so if your company is growing or planning on hiring more than a few people. Process management systems like Jira[2] are ideal for this purpose. The tracking system becomes the focal point for the control, information, and comments pertaining to the candidate.

You should track how the candidate entered the pipeline (recruiter, job board, referral, *etc.*) It is helpful to have a comments section where notes on the candidate can be provided such as location, visa status, cover letter, or anything else of interest that isn't in the résumé.

The résumé and any other documents should be linked to the entry in the tracking system. As reviewers and interviewers encounter the candidate, they comment in the tracking system. The system can be used as the focal point for voting on whether to reject the candidate or move him or her to the next phase of the process.

Think carefully before adding salary information to the tracking system. You may not wish all the participants—people that need access to the tracking system—to see salary information. This information is valuable to track but you may need to have an additional means for tracking it.

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[2]www.atlassian.com/software/jira

The process coordinator can be responsible for setting up the entries in the tracking system, moving the entry through the process phases, and closing the entry. It is a good idea to limit accessibility of a tracking entry after a candidate is hired to avoid awkward situations in which an employee can view the comments of their hiring process. Most tracking systems provide a means of specifying visibility either on a group or individual basis.

 Tracking provides a foundation for continuous improvement.

Tracking is invaluable. Even a quick hiring process takes a few weeks and busy participants are likely to forget a lot about a candidate in that period of time. With a large number of candidates moving through the system, it doesn't take long before participants forget vital candidate information.

The tracking system provides a way to accumulate knowledge for each phase of the interview so ideas and concerns can be passed, for example, from the résumé review phase to the phone interview phase. These hints are vital to a successful process that leverages the power of many minds.

The tracking system also provides a way to monitor how interviewers are doing. Set up your tracking system to send email to all the participants. Encourage people to read the comments. Have a few senior interviewers review and give feedback on the comments to help the staff improve.

It is surprising how many candidates reapply, sometimes years later. It is so valuable to have the history available to see what happened before. Sometimes it is harmless: the candidate took another offer. Sometimes it is serious: the candidate failed a background check; the candidate had a dangerous personality, *etc.* Sometimes the candidate was too junior and specific concerns were raised: with history you have a yardstick to see how far the candidate has progressed, which is invaluable in hiring the right people.

Beyond comment tracking, it is also very useful to track the hiring pipeline performance. If you have a process coordinator, this person is in a position to track the data. Table 1.1 is a variant of a tracking table shown by Johanna Rothman.[3]

Report on this data weekly or monthly, depending on the speed of your process and throughput. The faster you are, the finer the reporting resolution.

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[3]Rothman, *Hiring the Best Knowledge Workers, Techies & Nerds* [Rot04]

Table 1.1 · Track the hiring pipeline performance

Recruiting Strategy	# Résumés Received	# Phone Screens	# of On-sites	# Offers	# of Hires
Recruiter 1					
Monster					
Web Site					

The primary goal is efficiency. Here are some things to look for:

Evaluate data from end-to-end to measure strategy effectiveness. The bottom line is the number of hires a strategy is providing, so this is a key measure. Non-producing strategies ought to be considered for elimination if they have a significant cost associated with them.

Evaluate data from step-to-step to understand process efficiency. Each step (column) tells you something about a part of your hiring process in regard to the particular strategy. For example, a particular recruiter may be sending a huge number of résumés and few are phone screened; this is bad.

Recruiting strategy signal-to-noise ratio. Every résumé you receive has a cost so you want to minimize the noise (the number of candidates that do not get phone screens). If dealing with a recruiter or human resources (HR) department, manage expectations to improve the fidelity of job match. Remove noisy, expensive strategies that have low effectiveness from the process if you cannot improve the noise problem.

Establish targets for the signal-to-noise ratio. A 45 to 50 percent ratio of phone screens to résumés received would be very good for a managed process. By managed process, I mean that the input end of the strategy is doing something to improve fidelity. For example, a recruiter should be performing filtering for you. A less than 25 percent ratio ought to be investigated. In an unmanaged process, these ratio targets would be much lower.

Watch the cost. Recall the discussion about costs of the process steps on . Actively manage expensive strategies to drive down costs.

Phone screen to on-site ratio. If you are doing a good job at résumé reviews, you should target around a 35 to 45 percent ratio here. If you drop below 25 percent for a couple of months, investigate your staff's ability to perform résumé reviews. Too many unjustified phone screens are being scheduled.

Ratio of offers to on-site visits. You should average close to 50 percent if you do very good phone screens. If you are dropping below 25 percent for a couple of months, your phone screens are ineffective.

Offer to hire ratio. Target about 70 percent. If you are dropping below 50 percent for a couple of months, either you are not selling your opportunity effectively in the on-site, or your offer is weak (think total package). Ask candidates (or recruiters) for feedback on why they turn you down.

The feedback here is critical. You measure the effectiveness of the pipeline and let the hiring staff see how they are doing. Encourage the team or even intervene to correct obvious problems. This simple tracking will provide you with all you need to monitor the health of your hiring system.

1.6   Nothing is certain—and that's OK

Hiring is a very fuzzy process. You can rarely be certain that you are making the right decision. When you reject a résumé, you cannot know if you are throwing away an opportunity to hire the person that will transform your company. It's OK.

The techniques described in this book are probabilistic and mastered through practice. You will learn as you practice how to "see" things that you couldn't see before. Your vision will improve but you will always continue to see mirages. Sometimes you will act on those mirages and make mistakes. It's OK.

The goal is to learn to make good choices most of the time without being inefficient. Theoretically, you could phone interview every candidate that gives you a résumé, and if you do good phone interviews, you will probably have a high probability of inviting the right people for an on-site interview.

In practice, you will not have the time to run quality phone interviews on all the candidates so you will have to weed out a significant number of

résumés to save time and money. If you learn to do this well, your success rate will approach the all-in rate but with much less wasted time. Remember that your day job is to develop software!

Hiring is an imprecise art. You will make some mistakes; it's OK.

Alistair Cockburn draws an analogy with Ancient Japanese warrior training where three phases of learning are named *Shu*, *Ha*, and *Ri*.[4] At Shu level, the person requires a set of rules to apply, thus allowing a baseline of effectiveness. At the Ha level, the person seeks alternative rules, tries bending rules, or even eliminating some, thus optimizing. At the Ri level, the person is a master of situation and skill. The right techniques are applied in real time, backed by experience and reflection, with little or no thought of rules; new techniques are created as needed. It might help to think of Shu, Ha, and Ri as Learn, Collect, and Invent/Blend.[5]

With regards to hiring, a person at the Shu level will find value in the checklists, guidelines, *etc.*, found in this book, and will refer back to them often. At the Ha level, the person realizes the limitation of checklists and the like and collects other techniques, bends the techniques, discards some rules where they don't apply. She reflects on the underlying principles of the existing wisdom and can apply it at will with useful variations. At the Ri level, the person has internalized the wisdom and principles to such a degree as to wield them instantaneously in any situation. New situations are not a problem; the Ri level person merely adjusts and succeeds.

People new to these techniques desire certainty. They want rules. They often misinterpret the techniques as predictive rather than empirical. It is human nature when approaching a process to desire a set of functional rules to use right away. But for empirical processes, rules never work well. Now that you know this, your goal is to move through the learning phases as efficiently as possible, and avoid the temptation to grasp at certainties.

Since most readers are at the Shu level, I have presented information so that it can be used as guidelines. For example, I provide a résumé review checklist in Appendix **??** that will be valuable to the Shu. The Ha-level

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[4]Cockburn, *Agile Software Development, The Cooperative Game* [Coc06]
[5]"Shuhari" [**?**]

person will begin to feel the checklist is unwieldy and incomplete. She will devise some new guidelines based on her observations. As she begins to transcend the guidelines, she will see higher order patterns and relationships that begin to tap into the real power of these techniques. As new people come into the hiring process, they will not understand how the Ri-level people arrive at some of their conclusions, and that's OK.

1.7   Conclusion

Hiring well is critical to your organization, but it is imprecise. You can radically improve the quality of your hiring with some foundational support. Develop hiring as a core competence based on hiring principles that promote quality and consistency. Understand the roles involved in hiring. Establish a tracking system to help manage the hiring process, to communicate about candidates, and to provide a feedback mechanism for staff improvement.

One more thing is required before you start evaluating candidates: defining the target. In the next chapter, I'll discuss how to define the job descriptions you are going to hire for.