Phone Screen Form

Target length: 15 to 20 minutes. Ask the knockout questions first; if a must-have is clearly not met, close the call politely and record the reason. Ask every applicant for the same role the same questions. Record answers, not impressions.

CALL DETAILS

Applicant name

Phone number

Email

Position

Requisition number / location

Recruiter

Call date and time

Call outcome

☐ Completed ☐ No answer: voicemail left ☐ No answer: text sent ☐ Rescheduled
☐ Applicant withdrew

OPENING SCRIPT (1 MINUTE)

"Hi [Applicant Name], this is [Your Name] from [Company]. You applied for our [Job Title] role in [Location]. Is this still a good time for about 15 minutes?

Great. I'll ask a few questions about your availability and experience, tell you a bit about the role and pay, and then explain next steps. Sound good?"

KNOCKOUT QUESTIONS (3 MINUTES)

This role is [schedule, e.g. full-time, Monday to Friday, 10 a.m. to 7 p.m., with one Saturday a month]. Can you work that schedule?

☐ Yes ☐ No ☐ Partly: see notes

The job is based at [site address] / is fully remote with [equipment or internet requirement]. Does that work for you?

☐ Yes ☐ No

The pay is [$__ per hour / salary range] plus [shift differential, bonus]. Does that fit what you are looking for?

☐ Yes ☐ No ☐ Wants to discuss

Are you legally authorized to work in [Country]? Will you now or in the future require sponsorship for employment visa status?

☐ Authorized, no sponsorship ☐ Requires sponsorship ☐ Not answered

Required license / certification / minimum qualification: [name it]. Do you hold it?

☐ Yes ☐ No ☐ In progress ☐ Not applicable

If hired, when could you start?

Knockout notes

EXPERIENCE AND MOTIVATION (8 MINUTES)

Tell me about your current or most recent job. What do you do day to day?

What interested you in this role? (Listen for a real reason: pay, schedule, career step, the work itself.)

[Role question 1, e.g. Tell me about a recent time you helped a frustrated customer. What did you say?]

[Role question 2, e.g. Which systems or tools have you used for this kind of work?]

Why are you leaving, or why did you leave, your last job?

Are you interviewing elsewhere or holding any offers? Timeline?

QUICK RATINGS

Communication on the call (clear, answers the question asked)

☐ 3 - Strong ☐ 2 - Acceptable ☐ 1 - Concern

Relevant experience for this role

☐ 3 - Strong ☐ 2 - Acceptable ☐ 1 - Concern

Motivation / reason for applying is credible

☐ 3 - Strong ☐ 2 - Acceptable ☐ 1 - Concern

Evidence behind any rating of 1

ROLE OVERVIEW AND CLOSE (3 MINUTES)

Briefly describe the role, training period, team and the realistic downsides (for example, mandatory overtime in peak season or strict schedule adherence). Then answer the applicant's questions.

"Thanks, [Applicant Name]. The next step is [assessment / interview with hiring manager / site visit]. You'll get [an email / a text] from us by [Date] with [a link to schedule / details]. If anything changes on your side, just reply to that message."

DECISION

Recommendation

☐ Advance to next step ☐ Hold: revisit if pipeline is thin ☐ Do not advance

☐ Refer to a different open role: [title]

Reason (job-related)

Applicant's questions or concerns to pass to the hiring manager

Next step scheduled for