

HIRING WITH CLARITY :

Worksheet for Credit Union Teams

Take 10–15 minutes to reflect and complete each section thoughtfully. Use this as a conversation tool with your team or as a prep guide before your next hire.

What's Really Missing from Our Team?

Circle all that apply or write your own.

- | | |
|---|--|
| <input type="checkbox"/> We need someone dependable | <input type="checkbox"/> We need better communication with members |
| <input type="checkbox"/> We need more energy and warmth | <input type="checkbox"/> We need someone who learns quickly |
| <input type="checkbox"/> Our team is burned out — we need support | <input type="checkbox"/> We need calm under pressure |
| <input type="checkbox"/> Our members need more empathy and patience | |
| <input type="checkbox"/> Other: | |

What Does Success Look Like in the First 90 Days?

What would this person need to accomplish to make you say, "Yes! We hired the right person?"

Who Thrives on This Team?

Think about your best frontline employees. What do they consistently do well?

What Should We Be Honest About?

Transparency attracts people who are ready, realistic, and genuinely interested in doing the work well. It also helps the right people say “yes,” and the wrong ones say “no” before anyone wastes time. What about this role could be challenging? And how can we say that clearly and professionally?

Build Your Hiring Focus Statement.

Use this sentence frame to clarify your true hiring goal before writing the job description or planning interviews.

We're hiring someone who can _____
so that our team can _____
and our members can _____.

Use your answers from this worksheet to shape a job description that's clear, human, and aligned with your team's real needs.