

A SUCCESSFUL FD/CFO PROJECT PLAN & CHECKLIST

When	Action	Done (Y/N)
PRELIMINARY PLANNING		
Preliminary	Job description & person profile finalised	
Preliminary	Potential salary budget & benefits approved	
Preliminary	Agreed how to source candidates and deadline for final shortlist submission	
Preliminary	Agency terms signed (if applicable)	
Preliminary	Confirm date for reviewing CVs and contacting potential interviewees	
Preliminary	Interview locations established & interviewers diaries reserved for all stages	
SHORTLISTING & SELECTION		
Week 1	Initiate Candidate Outreach	
Week 2	Conclude Candidate Outreach	
Week 2	Commence Prescreening interviews	
Week 3	Complete Remaining Prescreening Interviews	
Week 3	Collect any required documentation	
Week 3	Recruiter shortlist submission	
Week 3	Employer shortlist review	
Week 3	Contact interviewees to arrange interviews for next week	
INTERVIEWS & OFFER		
Week 4	Conduct 1st Interviews	
Week 4	Provide Interview feedback no later than 48 hours after the interview	
Week 4	Book 2nd interviews for next week. Allow 5-7 days gap if a presentation is required	
Week 5	Conduct 2nd Interviews	
Week 5	Provide Interview feedback no later than 48 hours after the interview	
Week 5	Arrange next steps.	
Week 6	Final stage: Meet team, offer discussion, verbal acceptance & written contracts released	
CONTRACTS & ONBOARDING		
Week 7	Candidate resigns and start date agreed	
Week 7	Signed contract returned	
Week 8+	Candidate commences working any notice period with current employer	
Week 8+	Maintain regular contact throughout notice period	
Week 8+	Day one instructions confirmed	
RESULT	Candidate starts	

Need help recruiting an FD or CFO?

Contact us on **0345 1309 888** or to arrange a callback, complete our [contact us form](#)