



Sample Telephone Reference Check

Applicant:	Jane Smith
Person Contacted:	Mike Jones
Telephone:	(540) 555-1212
Date Conducted:	09/09/2005
Conducted By:	Lagniappe Resources, Inc.

Relationship: ☒ **Prior Manager** ☐ **Coworker** ☐ **Subordinate** ☐ **Other**

Mike is currently the President of Docu-Serve. Mike was the Manager of Documentation Services at XYZ Company where he and Jane worked together for approximately fourteen months ending in March 2005. Jane was a Technical Writer and a direct report.

Responsibilities:

As a Technical Writer, Jane worked on a number of projects. She did a reference guide and on-line help for the ABC product and worked with Framemaker and Robohelp. Jane also did documentation for the XYZ product and worked on a training guide for ABC product.

Performance:

Mike said Jane was great to work with and possessed a fabulous attitude. Jane was very autonomous and knew when to go to Mike with a problem. She was always pleasant to work with and did extremely well in a team environment. Jane wanted to learn. She volunteered for additional projects and never missed a deadline.

Jane had excellent oral and written communication skills and was able to communicate with people at all levels. She was a very good editor and had excellent attention to details.

Strength(s):

Mike said Jane had a great attitude and was always willing to take on new projects. She was the first to volunteer for projects.

Area(s) to Develop:

Jane did not have as much actual work experience as others on the team, but she does have a very good educational background and training. She just needs to get more experience with different types of projects.

Reason for Leaving:

Jane's position was eliminated in a company downsizing.

Would you rehire? ☒ **Yes** ☐ **No**

Mike said, "Definitely."

Would you recommend for employment? ☒ **Yes** ☐ **No**

Mike said, "In a heartbeat."



Sample Telephone Reference Check

Applicant:	Bob Miller
Person Contacted:	Grady Harris
Telephone:	(306) 555-1212
Date Conducted:	02/31/2004
Conducted By:	Lagniappe Resources, Inc.

Relationship: ☐ Manager ☐ Coworker ☒ Prior Subordinate ☐ Other

Grady worked for Bob at MJR Linens, Inc. and is currently working as Corporate Controller at Monterey Industries. Grady and Bob worked together at MJR Linens for approximately six years where Bob was the CFO. Grady was hired as a Senior Staff Accountant and was later promoted to Controller and was a direct report to Bob.

Responsibilities:

Bob was responsible for standard CFO type responsibilities including tax, treasury, budgets and financial reporting. He worked with the banks refinancing part of the company's debt and reviewed potential acquisitions. He was very involved in the due diligence, acquisition and integration of two smaller companies acquired by MJR Linens.

Performance:

Grady said Bob was a great mentor. Bob did a good job of setting up his staff for success. He gave them the opportunity to stretch and learn more. Grady said Bob had a fun personality and was really enjoyable to work with.

Bob has a very strong knowledge of accounting and finance and is a CPA. Grady said Bob was well respected and viewed as a leader within the company. Bob worked well with bankers, investors and outside auditors. Bob had a tremendous amount of integrity. People felt very comfortable working with him.

Strength(s):

Bob had the ability to keep a company afloat from a financial perspective. He had the unique ability to structure cash flow, even during tough times. Bob also had the ability to communicate and implement financial controls to maximize profitability.

Area(s) to Develop:

Grady said there were no developmental areas regarding Bob. Bob was very experienced although Grady did not think Bob had done an IPO.

Reason for Leaving:

MJR Linens was sold to Monterey Industries and Bob's position was eliminated.

Would you work with again? ☒ Yes ☐ No

Grady said he would love to work with Bob again.

Would you recommend for employment? ☒ Yes ☐ No



Sample Telephone Reference Check

Applicant:	Rhonda Houk
Person Contacted:	Susan Mayfield
Telephone:	(281) 555-1212
Date Conducted:	09/14/04
Conducted By:	Lagniappe Resources, Inc.

Relationship: ☒ Previous Manager ☐ Coworker ☐ Subordinate ☐ Other

Susan is the Supervisor of Data Administration at Bodron Holdings, Inc. where Rhonda reported to her from 2001 to 2003.

Responsibilities:

Rhonda started as a Clerk and was later promoted to Data Specialist. In that position, she setup databases, created programs, automated systems and developed reports for the Marketing Department. She worked primarily with Access.

Performance:

Susan said Rhonda was never rattled, always in control, calm and cooperative. She was able to work well under pressure, got along with others and was extremely competent. Rhonda had fantastic written and oral communications, was very organized and very good at prioritizing.

Strength(s):

- Technical skills
- Ability to understand user requirements
- Dependability

Area(s) to Develop:

Susan said Rhonda needed to promote herself more. She had a lot of good ideas and needed to speak up.

Reason for Leaving:

Rhonda left Bodron Holdings when she moved to Arizona.

Would you rehire? ☒ Yes ☐ No

Would you recommend for employment? ☒ Yes ☐ No



Sample Telephone Reference Check

Applicant:	Larry Earle
Person Contacted:	Mark Jackson
Telephone:	(404) 555-1212
Date Conducted:	10/20/04
Conducted By:	Lagniappe Resources, Inc.

Relationship: ☒ **Previous Manager** ☐ **Coworker** ☐ **Subordinate** ☐ **Other**

Mark was a Sales Director at Supra Pharmaceuticals where he hired Larry in 1998. Larry reported to him for four or five years until Mark retired in 2003.

Responsibilities:

Larry was a Pharmacy Sales Representative in the Northeast territory. He sold Tozac and Compaine to physicians, hospitals and pharmacies.

Performance:

Mark said Larry was one of the most impressive people he has ever worked with. He has a Master's degree in Biology. Larry was a hard worker and was very intense. He was one of those employees who put more on himself than his manager. Larry got things done. He had very good judgment and could speak to physicians on their level. Larry was a very strategic thinker.

Larry was an excellent presenter. He was very knowledgeable of their products as well as their competitors' products. Larry was very quick on his feet. If he did not have an immediate answer, he would find out and get back to you.

Strength(s):

- Excellent presentation and communication skills
- Exceedingly intelligent

Area(s) to Develop:

Mark said he could not think of any developmental areas regarding Larry.

Reason for Leaving:

Mark did not know why Larry is seeking a new position. Mark retired from Supra in 2003.

Would you work with again? ☒ **Yes** ☐ **No**

Would you recommend for employment? ☒ **Yes** ☐ **No**



Sample Telephone Reference Check

Applicant:	Kim Barrett
Person Contacted:	Pam Jones
Telephone:	(504) 555-1212
Date Conducted:	10/26/04
Conducted By:	Lagniappe Resources, Inc.

Relationship: ☐ Manager ☒ Previous Internal Client ☐ Subordinate ☐ Other

Karen is a Manager in Applications Support at Pichetto's where she worked with Kim for about three years. Kim provided support to Karen's department.

Responsibilities:

Kim provided I.T. support and dealt with any kind of system anomalies. She handled escalated issues, priority one trouble tickets and after hours support.

Performance:

Karen said Kim was great to work with. She was very responsive, listened well and tried to get resolutions. Kim was a real digger, had very good technical skills and could analyze large amounts of data. Karen's team preferred to work with Kim to anyone else in the Support group. She was very quick to respond and was always professional and courteous.

Strength(s):

Kim was a good listener. She did not make snap judgments, but would listen to all of the symptoms before deciding on a plan of action.

Area(s) to Develop:

Kim improved as she progressed and got more experience.

Reason for Leaving:

Kim's position was eliminated in a downsizing.

Would you work with again? ☒ Yes ☐ No

Would you recommend for employment? ☒ Yes ☐ No



Sample Telephone Reference Check

Applicant:	Richard Warner
Person Contacted:	Tony Franklin
Telephone:	(336) 555-1212
Date Conducted:	09/07/05
Conducted By:	Lagniappe Resources, Inc.

Relationship: ☒ **Prior Manager** ☐ **Coworker** ☐ **Subordinate** ☐ **Other**

Tony is currently the CEO at PlenTech. Tony was the CEO and Co-Founder of a start-up company, Zip Technology where Richard was the CFO. Tony recruited Richard to Zip Technology in 2001.

Responsibilities:

Richard was the CFO at Zip Technology where he raised a small round of investment funds. He managed the financial controls of the business as well as the financial planning. Richard handled contract negotiations and had the primary relationship with legal counsel. He also helped in business planning.

Performance:

Tony said Richard was very professional and a great guy to work with. Richard is a CPA and had a very good understanding of accounting rules and regulations. He was an excellent negotiator. Richard was crisp in his communications and presented himself well.

Richard was a good mentor and coach to his staff. They loved him and were very loyal to him. He hired good people and empowered them to do their jobs.

Richard was dependable, reliable and completed tasks timely and within deadlines. He developed good relationships with the executive team, the Board and outside investors. Richard was extremely honest and people felt comfortable with him and the information he provided.

Strength(s):

Richard had a great grasp of the overall business. He was more than a "bean counter." Tony said, "He was a CFO that could be a CEO."

Area(s) to Develop:

Tony did not think Richard had any experience in a turn-around situation.

Reason for Leaving:

Tony sold the company last year and there is a new CEO who is taking the company in a different direction. Richard is ready to make a change and do something new.

Would you rehire? ☒ **Yes** ☐ **No**

Tony said, "If I needed a CFO at my current company, Richard would not be talking to you."

Would you recommend for employment? ☒ **Yes** ☐ **No**

Tony said, "Highly!"



Sample Telephone Reference Check

Applicant:	Christopher Hille
Person Contacted:	Jessica Andrews
Telephone:	(281) 555-1212
Date Conducted:	8/28/2005
Conducted By:	Lagniappe Resources, Inc.

Relationship: ☒ **Prior Manager** ☐ **Coworker** ☐ **Subordinate** ☐ **Personal** ☐ **Other**
Christopher is the Manager of Customer Service at Woodlands, Inc. Jessica worked for Christopher at Woodlands for approximately nine months as a Customer Service Representative.

Responsibilities:

As a Customer Service Representative, Jessica was responsible for handling in-bound calls from customers placing orders from their catalog.

Performance:

Christopher said Jessica was a very nice person and he liked her a lot, but she did not do a good job. She was polite with customers, but had a hard time entering orders into the system. She would enter incorrect information and not go back and check her work. Christopher said, "I think she was just going too fast and wasn't paying attention." He counseled her on several occasions and sent Jessica back for additional computer training.

Strength(s):

Jessica was a very nice girl and well liked by everyone in the department.

Area(s) to Develop:

Jessica needed to slow down and improve her attention to details.

Reason for Leaving:

Jessica decided that the position was not a good fit for her and she quit.

Would you rehire? ☐ **Yes** ☒ **No**

Would you work with again? ☒ **Yes** ☐ **No**

Would you recommend for employment? ☒ **Yes** ☐ **No**

Christopher said he would recommend Jessica for a position where she did not have to type or use a computer.



Sample Telephone Reference Check

Applicant:	Jackson Meister
Person Contacted:	Joan Schell
Telephone:	(504) 555-1212
Date Conducted:	7/16/2005
Conducted By:	Lagniappe Resources, Inc.

Relationship: ☒ **Manager** ☐ **Coworker** ☐ **Subordinate** ☐ **Personal** ☐ **Other**

Joan is the CFO at Orleans Brand Foods where Jackson was the CIO. They worked together for approximately one year in the 2003-2004 time period. Jackson was a direct report.

Responsibilities:

As the CIO, Jackson was responsible for all systems (hardware and software), networks and their telephone systems. He had approximately ten employees reporting to him.

Performance:

Joan said Jackson was very knowledgeable about computers and technology in general. He loved to dig into the details and was very up-to-date on the latest technology. He worked well with his I.T. staff. Jackson did not do as well working with the various department managers who were very reluctant to change. He had a hard time communicating technical information at a level they could understand. Because of that, he had a hard time implementing new systems and met with a lot of resistance.

Strength(s):

Jackson was very knowledgeable of technical issues and worked well with technical staff.

Area(s) to Develop:

Jackson needed to work on his communication skills with non-technical people.

Reason for Leaving:

Joan said she asked Jackson to leave the company because he was not a good fit for the organization.

Would you rehire? ☐ **Yes** ☒ **No**

Would you work with again? ☐ **Yes** ☒ **No**

Would you recommend for employment?

Joan said it would depend on the position. Jackson has good technical skills, but does not work well with non-technical management.