

## TRX SEARCH CANDIDATE RESOURCE

# Reference Preparation Worksheet

**Choose people who can speak to the work - not simply impressive names.**

A useful reference is someone who directly observed enough of your work to give specific, credible context. The goal is not to collect the most senior people you know. It is to identify the people who can validate the evidence a hiring team is trying to understand.

## Context is appropriate. Coaching is not.

Tell a reference what role you are considering, what the process involves and what they may be asked about. Do not give them a script or tell them what answer to provide.

Candidate

Opportunity / company

## What may the hiring team need validated?

Check the areas that matter for this opportunity. Your references do not all need to cover the same things.

- |                                                            |                                                         |
|------------------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> Leadership & developing others    | <input type="checkbox"/> Business results / performance |
| <input type="checkbox"/> Technical / functional depth      | <input type="checkbox"/> Judgment & decision-making     |
| <input type="checkbox"/> Collaboration / influence         | <input type="checkbox"/> Change / transformation        |
| <input type="checkbox"/> Customer / commercial credibility | <input type="checkbox"/> Reliability / integrity        |
| <input type="checkbox"/> Management style / culture        | <input type="checkbox"/> Other role-specific evidence   |

## Reference map

| Name | Relationship | Company / role | Dates worked together | What they directly observed |
|------|--------------|----------------|-----------------------|-----------------------------|
|      |              |                |                       |                             |
|      |              |                |                       |                             |
|      |              |                |                       |                             |
|      |              |                |                       |                             |
|      |              |                |                       |                             |

## 01 | PREPARE THE PERSON - NOT THE ANSWERS

# Give each reference enough context to be useful.

A reference should know why you are considering the role, what the company is trying to learn and when they may be contacted. They should not be surprised by the call.

## REFERENCE 1

Name

Preferred phone / email

Our working relationship

Dates / organization

### What can this person credibly speak to?

Scope, performance, leadership, technical depth, judgment, collaboration, growth, etc.

### What examples did they directly observe?

Think specific work, decisions, projects, results or situations.

### What context should I give them about the opportunity?

Role, company, why I am considering it, what the hiring team may want to understand, and expected timing.

## REFERENCE 2

Name

Preferred phone / email

Our working relationship

Dates / organization

### What can this person credibly speak to?

Scope, performance, leadership, technical depth, judgment, collaboration, growth, etc.

### What examples did they directly observe?

Think specific work, decisions, projects, results or situations.

### What context should I give them about the opportunity?

Role, company, why I am considering it, what the hiring team may want to understand, and expected timing.

## 02 | COMPLETE THE REFERENCE SET

# Build a set that gives the hiring team useful perspective.

## REFERENCE 3

Name

Preferred phone / email

Relationship / dates

What they can validate

Context I should give them

## REFERENCE 4

Name

Preferred phone / email

Relationship / dates

What they can validate

Context I should give them

## Before I submit references

- ☐ I asked each person for permission to use them as a reference.
- ☐ Their phone number and email are current.
- ☐ They know the type of role and company I am considering.
- ☐ They know approximately when they may be contacted.
- ☐ I selected people who directly observed the work I want validated.
- ☐ I did not give anyone a script or tell them what to say.
- ☐ I have thought carefully about confidentiality before using anyone at my current employer.
- ☐ My recruiter knows any context that may affect how a reference should be interpreted.

### TRX perspective

A strong reference confirms evidence that already exists. It should add context and credibility - not rescue a weak interview or manufacture a story.