

WorkWise Guidance for Shortlisting and Longlisting Candidates

Recruitment is all about attracting applicants and then making fair, confident decisions on who progresses. Longlisting and shortlisting are the stages where you narrow the field. When done well, they give you a clear, consistent, and inclusive process. Without care, you might miss great talent, accidentally introduce bias, or leave candidates frustrated.

This guide explains what longlisting and shortlisting are, why they matter, and how to approach them in a way that's fair, efficient, and respectful, for both you and your candidates.

Planning Your Time

Shortlisting and longlisting will always take longer than you think. If you try to squeeze it in between other tasks, you'll either rush or keep candidates waiting, and in a competitive industry, that means losing good people.

- **Block time in your diary** for when applications close. Treat it as a priority, not an afterthought.
- Allow more time than you think. Reading 30 CVs properly can take 1-2 hours, and that's before portfolios, showreels, or cover notes.
- Work quickly but carefully. If you take too long, the best candidates will have accepted other roles.
- Think of this stage as an investment. The time you put in here will save you far more later by making interviews sharper and reducing the risk of a poor hire.

What is Longlisting?

Longlisting is the first sift of applicants. It's about checking applications against the **essential criteria** in your job description and identifying those who meet the minimum requirements.

Think of it as your "first cut" - who could do the job based on evidence provided. You're not deciding who is *best* yet, just who is eligible.

- Use your job description as a checklist. For example: if "After Effects for motion graphics" is essential, you need to see this mentioned explicitly in their CV or demonstrated in their showreel.
- Anyone who doesn't meet the essentials should be removed (and ideally notified quickly and kindly).
- Keep it simple at this stage and stick to the essentials – don't bring desirables in yet.

What is Shortlisting?

Shortlisting comes after longlisting. This is where you refine the pool to those you'll interview, using both **essential** and **desirable** criteria.

- It's about identifying who is the strongest fit for the role, while still being fair and consistent.
- Use your agreed criteria to compare applicants, not gut instinct.
- Typically, 4-6 candidates is a good number to invite to interview, depending on the role.
- If lots of candidates meet all the essentials, use the desirables to prioritise fairly.
- Avoid inviting people just for "comparison" if you already know they're unlikely to succeed – it wastes everyone's time and can feel disrespectful.

Reviewing Creative Work

At shortlisting stage, you might be looking at portfolios, showreels, and demo materials alongside CVs. Here's how to approach them fairly:

- **Set clear criteria for creative work** beforehand. For example: technical skill, creativity, relevance to your project, presentation quality.
- **Allow proper time** for portfolio reviews – rushing through showreels or design work means you'll miss important details.
- **Look beyond polish.** A student reel might show raw talent that's perfect for a junior role, even if it's not as slick as a senior's work.
- **Consider the brief.** If someone's portfolio is mostly commercials but you're hiring for drama, look for transferable skills and creative problem-solving.
- **Be consistent.** If you're spending 10 minutes on one person's reel, spend similar time on everyone's.
- **Make notes** on what you see in the creative work, linked back to your criteria – "strong character animation skills, good understanding of timing" is more useful than "liked it."

Screening Calls (Optional step if you're struggling to narrow the shortlist)

Sometimes even after shortlisting, you might still have more strong candidates than you can realistically interview. A short phone or video call (10-20 minutes) can help you make those final decisions.

- **Prepare a few set questions** and ask everyone the same ones so it's fair and consistent. For example:
 - What interests you about this role or project?
 - Are you available for the dates we've listed?
 - Do you have experience with [essential skill or software]?
 - What do you enjoy most about working in [role/industry]?
- **Keep it brief** – this isn't a full interview, just a chance to confirm essentials, check enthusiasm, and get a sense of communication style.

- **Jot down notes** – stick to factual answers and link them back to your criteria. This way your decisions are clear and easy to explain if needed.
- **Use it to trim the list fairly** – for example, if you've got 10 strong candidates, screening calls can help you narrow it down to 5 or 6 for final interviews.

This stage is also useful for candidates. It gives them the chance to ask questions and decide if the role feels right for them before committing to a full interview.

Best Practice for Longlisting and Shortlisting

- **Be clear on criteria** before you start. Use the job description and person specification, not shifting preferences.
- **Work in pairs (or more)**. Having at least two people review applications reduces individual bias.
- **Document decisions**. Keep short notes on why someone has/hasn't progressed. This creates fairness, transparency, and a clear audit trail.
- **Use simple scoring grids**. Even a 1-5 scale against each essential helps make decisions more objective.
- **Stay consistent**. Apply the same standards to every candidate. Keep the goalposts in the same place once you've started.

Inclusion and Fairness

- **Focus on evidence, not assumptions**. Only assess what's actually written or shown – avoid guessing what someone "probably means."
- **Keep it simple at longlisting**. Stick to essentials at this stage; bring desirables in at shortlisting.
- **Watch for bias**. Guard against assumptions based on name, background, education, or even the format of a CV.
- **Be neuroinclusive**. Some applicants present differently. Look for substance, not just polish; a cover letter full of typos shouldn't rule someone out if written communication isn't the job's core skill.
- **Keep an open mind about career breaks and location**. Many people are flexible around travel or able to move, and career gaps often hide valuable life experience.
- **Balance referrals and open applications**. Word-of-mouth is powerful in our industry, but it needs to be weighed fairly against external applicants.
- **AI and tools**. If you use software to filter CVs, make sure a human makes the final decision.

Candidate Communication

How you communicate during this stage says a lot about your business. Candidates often complain they never hear back, and in a small industry like ours, that hurts your reputation.

- **Acknowledge applications.** A simple automated "thanks for applying" makes a difference.
- **Notify quickly** if someone isn't longlisted. Keep them informed rather than leaving them wondering for weeks.
- **For shortlisted candidates**, be clear about the next stage, what to expect, who they'll meet, and give them proper prep time.
- **Close the loop** with everyone. Even a short message builds goodwill.

Common Pitfalls to Avoid

- **Over-reliance on gut feel.** Instinct often reflects bias. Stick to criteria – this gets easier with practice.
- **Listing too many desirables.** Keep them realistic. Otherwise you'll rule out good candidates unnecessarily.
- **Not recording decisions.** Without notes, it's easy to forget your reasoning and hard to justify choices later. Write kind, factual notes linked to the criteria.
- **Rushing the process.** A hasty sift means you might miss great talent. Taking care now saves headaches later.

Why it Matters

When you do longlisting and shortlisting well, you get:

- A fair, transparent process for all applicants.
- A stronger interview stage with well-matched candidates.
- Confidence that decisions are evidence-based, not assumptions.
- Protection against discrimination claims.
- A better chance of hiring someone who will succeed and stay.

Think of it like casting: you're not just filling a role, you're shaping your team. Taking the time to do it fairly, consistently and thoughtfully pays dividends in the quality of the people you bring in.

WorkWise takeaway: Longlisting and shortlisting aren't admin chores, they're the foundation of fair, inclusive recruitment. Block the time, use your criteria, and treat every candidate with respect. The result? Better hires, stronger teams, and a healthier industry.