



Employee Referral Program Management Checklist 2026

Program Strategy & Goal Setting

Define the objectives of the referral program, such as increasing diversity, reducing cost-per-hire, or improving retention, and establish key performance indicators (KPIs) for 2026.

Primary Program Objective

Targeted Job Roles

Target Hire Count

Success Metrics (KPIs)

- ☐ Cost Per Hire Reduction
- ☐ Time to Fill Reduction
- ☐ Candidate Quality/Retention Rate
- ☐ Employee Engagement Increase
- ☐ Diversity & Inclusion Targets

Program Launch Date

Enter date...

HR Director Approval

Policy Development & Compliance

Drafting clear guidelines regarding eligibility, referral bonus structures, payout timelines, and ensuring all terms comply with local labor laws and anti-discrimination regulations.

Program Name

Write something...

Eligibility Criteria

Write something...

Compliance Documents Required

- ☐ Updated Anti-Discrimination Policy
- ☐ Data Privacy & GDPR Agreement
- ☐ Bonus Payout Terms & Conditions
- ☐ Conflict of Interest Disclosure

Effective Date of Policy

- ☐ Q1 2026
- ☐ Q2 2026
- ☐ Q3 2026
- ☐ Q4 2026

Finalized Policy Document

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HR Director Approval

Reward & Incentive Structure

Determining the types of rewards (cash bonuses, gift cards, or non-monetary perks) and establishing the verification process for bonus distribution.

Primary Reward Type

- ☐ Cash Bonus
- ☐ Gift Card
- ☐ Extra Paid Time Off (PTO)
- ☐ Company Merchandise/Swag
- ☐ Experience Voucher

Bonus Amount (USD)

Enter a number...

Eligibility Criteria for Payout

- ☐ Candidate reaches 90-day milestone
- ☐ Candidate completes probation period
- ☐ Successful completion of training

Terms and Conditions Summary

Write something...

Effective Date of New Incentive Structure

Enter date...

Technology & Integration

Setting up the referral portal within your Applicant Tracking System (ATS) or HRIS to allow employees to submit candidates and track progress seamlessly.

ATS/HRIS System Name

Write something...

Integration Channels

- ☐ Applicant Tracking System (ATS)
- ☐ Company Intranet
- ☐ Email Automation
- ☐ Slack/Microsoft Teams Integration
- ☐ Employee Self-Service Portal

System Configuration Documentation

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Integration Readiness Status

- ☐ Not Started
- ☐ In Progress
- ☐ Testing/QA
- ☐ Live/Fully Integrated

Integration Completion Deadline

Enter date...

Internal Communication & Launch Plan

Creating a multi-channel marketing campaign (email, Slack/Teams, company newsletters) to announce the program and educate employees on how to participate.

Internal Announcement Email Subject Line

Write something...

Communication Campaign Strategy Overview

Write something...

Program Launch Date

Enter date...

Communication Channels to be Used

- ☐ Company Email
- ☐ Slack/Microsoft Teams
- ☐ Company Intranet
- ☐ All-Hands Meeting Presentation
- ☐ Physical Office Posters

Draft Launch Assets (Graphics/Flyers)

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Primary Target Audience

- ☐ All Employees
- ☐ Department Heads Only
- ☐ New Hires Only

Referral Workflow & Tracking

Defining the step-by-step process from initial candidate submission to screening, interviewing, and the final hiring decision.

Referrer Name

Candidate Full Name

Referral Submission Date

Referral Status

- ☐ New Submission
- ☐ Screening in Progress
- ☐ Interviewing
- ☐ Offer Extended
- ☐ Hired
- ☐ Not a Fit

Department/Team Assignment

- ☐ Engineering
- ☐ Sales
- ☐ Marketing
- ☐ Operations
- ☐ Human Resources
- ☐ Customer Success

Candidate Resume/CV

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Referrer Notes & Candidate Context

Write something...

Candidate Experience & Feedback Loop

Ensuring all referred candidates receive timely communication and implementing a feedback mechanism to improve the referral quality over time.

Referral Candidate Status

- ☐ Initial Screening
- ☐ Interviewing
- ☐ Offer Extended
- ☐ Hired
- ☐ Declined/Rejected

Candidate Feedback Summary

Write something...

Candidate Net Promoter Score (NPS)

Enter a number...

Last Candidate Follow-up Date

Enter date...

Areas for Improvement in Recruitment Process

- ☐ Communication Speed
- ☐ Interview Professionalism
- ☐ Clarity of Job Description
- ☐ Technical Assessment Difficulty

Candidate Interview Feedback Forms

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Audit & Program Evaluation

Performing periodic reviews of referral data to measure program ROI, identify bottlenecks, and update the program for the upcoming fiscal year.

Audit Review Date

Enter date...

Total Number of Referrals Received

Enter a number...

Conversion Rate (Referral to Hire %)

Enter a number...

Key Performance Indicators (KPIs) Evaluated

- ☐ Cost Per Hire Reduction
- ☐ Time to Fill
- ☐ Candidate Quality/Retention
- ☐ Employee Participation Rate

Program Performance Summary & Findings

Write something...

Program Status

- ☐ Exceeding Targets
- ☐ Meeting Targets
- ☐ Below Targets
- ☐ Requires Urgent Revision

Audit Report Documentation

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HR Manager Approval

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 Generate Sample Report