BEFORE IT LEAVES YOUR DESK: A RECRUITER'S CHECKLIST FOR CVS AND CANDIDATE INTRODUCTIONS

Use this list before you send a CV, an anonymised profile or a candidate introduction to a client. It brings together the checks recruiters most often skip under time pressure: facts, identity, consent, presentation and the e-mail itself.

- Work through it once per candidate and per client — a check done for one client does not carry over to the next.
- If an item cannot be ticked, stop and resolve it first: ask the candidate, ask the client, or hold the introduction.
- Keep a note of what you sent, to whom and when.

01 · FACTS

- [ ] Job titles, employers and dates match the candidate's original CV or what they confirmed to you.
- [ ] Qualifications and certifications are named exactly as held — nothing upgraded, nothing implied.
- [ ] Language levels, location and work pattern (on-site, hybrid, remote) are current.
- [ ] Availability or notice period has been confirmed with the candidate recently.
- [ ] Salary or rate expectations are confirmed, and you know whether you are allowed to share them.
- [ ] Anything you could not verify is either left out or clearly marked as "to confirm".

02 · IDENTITY (ANONYMISED PROFILES)

- [ ] Name, e-mail address, phone number and postal address are removed.
- [ ] Photos, LinkedIn, GitHub or portfolio links are removed.
- [ ] Employer names, project or product names and unique job titles that would identify the person are generalised (e.g. "a European airline").
- [ ] Rare certifications, awards, publications or a very small home town that point to one person are generalised.
- [ ] The file name does not contain the candidate's name.
- [ ] Document properties (author, title, comments) and tracked changes are cleared in the PDF or DOCX.

03 · CONSENT AND REPRESENTATION

- [ ] The candidate agreed to be presented for this role, to this client — not only “in general”.
- [ ] The client has not already received this candidate from you or, as far as you know, from someone else.
- [ ] You know whether the candidate is applying elsewhere at the same company.
- [ ] You have a mandate or terms of business with this client, or you are clear that this is a speculative introduction.
- [ ] The candidate’s data protection information has been given (what you hold, why, and who you share it with).

04 · PRESENTATION

- [ ] The CV is in the client’s language, or the language agreed with the client.
- [ ] The format is consistent: dates, headings and spelling are uniform; no leftover template text.
- [ ] The most relevant experience for this role is easy to find in the first half page.
- [ ] The agency header or branding is correct and does not hide the facts.
- [ ] The PDF opens correctly, text is selectable and nothing is cut off.

05 · SENDING

- [ ] The recipient is the right person (hiring manager or HR, as agreed) and the e-mail address is checked.
- [ ] The e-mail explains why this candidate fits this role, with evidence — and is open about gaps.
- [ ] It proposes one concrete next step (e.g. a 20-minute call this week).
- [ ] Attachments are the approved versions — the right CV for the right client.
- [ ] You have recorded what was sent, to whom and when, and set a follow-up.
- [ ] A meeting is only recorded as booked once the client has confirmed a time.

This checklist is general guidance for recruiters, not legal advice. Data-protection duties depend on your country, your role and your contracts. Jenny is a product of Forti8 · hello@forti8.io