FREE PACK · INSIGHTS

Reference request template

A request email, a pre-send checklist and a reference form built to get evidence, not adjectives.

1. Request to the referee

Adapt the wording. Send from a work address, to a work address or via the organisation's switchboard, so you know who you are dealing with.

Suggested email or letter

Dear [name],

[Candidate's full name] has applied for the role of [job title] with [organisation] and has given permission for us to contact you for a reference. We understand you were their [relationship, e.g. line manager] at [organisation] between [dates].

We would be grateful if you could complete the attached form by [date]. A brief description of the role is attached so that you can comment on the areas that matter most. If you prefer to talk, I can call at a time that suits you: [phone].

Your reference will be treated in confidence, used only for this recruitment decision and kept securely for no longer than necessary. If your organisation's policy is to confirm factual details only, please say so; that is helpful too.

With thanks, [name, role, contact details]

Before you send – tick when done

- ☐ The candidate has given permission to contact this referee
- ☐ Current employer: a conditional offer has been made and the candidate has agreed
- ☐ The offer letter says it is conditional on references that are satisfactory to us
- ☐ The form asks nothing about health or sickness absence (Equality Act 2010, s.60, Great Britain) unless an offer has been made
- ☐ Sector rules checked (e.g. regulated financial services roles, work with children or adults at risk)

2. Reference form

Candidate	Role applied for

Referee name and job title	Organisation

Facts	Response
Dates of employment (from – to)	
Job title(s) held	
Your working relationship with the candidate	
How long you worked together	
Main responsibilities	
Reason for leaving, if known	

For each area of the role below, please describe an example of the candidate's work that you observed.

Area 1: [e.g. managing a team through busy periods]

Area 2:

Area 3:

What would you see as their main area for development?

Would you employ them again in a similar role? If not, please explain.

Are you aware of any current disciplinary action or warnings?
Optional section for roles working with children or adults at risk: are you aware of any concerns about their suitability for such work?

Signed	Date

Phone follow-up notes: who you spoke to, when, what was said. Record opinions as the referee's opinions.

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Does any of this sound familiar?

The organisations we work with rarely come to us asking for a survey. They come with something that is costing them money, time or people. These are the ones we hear most often.

MAKING MONEY

"We hire well on paper and still get it wrong in the role."
Personality, leadership and competency assessment matched to the job, so interviews test what matters and offers go to people who will perform. (FindingPotential)

"Our best people leave and we only find out why afterwards."
Exit intelligence in the leaver's final weeks: what was avoidable, who would come back, and what to change first. (LastOpinion)

"Leaders get feedback once a year and nothing changes."
Forward-looking 360 feedback that lands as development rather than judgement, with the actions built in. (FeedForward)

SAVING MONEY

"Too many new starters are gone inside a year."
New-starter surveys at the points the first-year leak opens, so you act at three months instead of reading about it at exit. (OnBoarder)

"References take weeks and tell us nothing."
Automated referencing with questions that predict, most returned within 48 hours. (ReferenceExpert)

"We run an engagement survey and the results sit in a drawer."
Engagement reporting down to team level in plain English, with the three moves each team's own people chose. (WinningFormula)

SOLVING PROBLEMS

"The board wants evidence on culture, conduct and speaking up."
A confidential always-on channel and a harassment-prevention audit that give you the evidence before a regulator asks for it. (SafeSpace)

"We publish an inclusion statement and cannot show whether it is true."
Inclusion measured at every stage from hire to exit, so you can see where the experience differs and act on it. (ED&I)

"We have the data and cannot turn it into a decision."
Twenty years of UK benchmark data and analysts who turn results into a board paper, not a dashboard. (Workforce intelligence)

Who we are

great{with}talent is a UK workforce-intelligence consultancy, founded in 2003. We help organisations hire better, keep people longer, improve leadership, strengthen inclusion and reduce workplace risk, with a connected set of tools that turn employee data into clear, fast action across the whole employee lifecycle. Independent, GDPR-compliant and Cyber Essentials certified, hosted on Microsoft Azure.

Not on the list? It will not always be. If you are working on something you think we might be able to help with, drop us a note describing what you are trying to do and we will come back to you.

On the list or not, let's talk.

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