THE SAVVY INTERVIEWER'S GUIDE

How To Conduct Successful Interviews and Improve Hiring Effectiveness

openview

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FOREWORD

Most executives at expansion-stage software companies understand that identifying, hiring, and retaining top talent is one of the most important components of building and scaling a great business. They typically also understand the potential risks and costs that they can incur when that process doesn't go as planned. According to a 2013 Career Builder study on the true cost of mis-hires, for example, 66 percent of employers reported that bad hires lowered their company's productivity, affected worker morale, caused drops in sales, led to strained client relationships, and even resulted in legal issues.[1]

Not surprisingly, bad hires typically have a direct financial impact as well. In fact, a report by the SHRM Foundation found that direct replacement costs, including accrued paid time off, temporary coverage with overtime or contingent employee costs, and staff time for exit interviews and administration, can reach 50 to 60 percent of an employee's annual salary.[2] If you factor in indirect costs, including any adverse effects on organizational performance, culture, and employee or client relations, the total expenditure of replacing an employee can range from 90 to 200 percent of annual salary. That's not an expense that many growing software companies can afford.

How can you avoid a bad hire and make the right hire in the first place? While there are many ways to increase the probability of making great hires, at OpenView we have found that one of the most effective practices is to place greater emphasis and focus on the interviewing process. Doing so will help you to more effectively identify candidates who align with your company and the role you are hiring for, filter out candidates who might lead to any of the aforementioned consequences of a bad hire, and create a more predictable, repeatable system for hiring success.

"The Savvy Interviewer's Guide: How To Conduct Successful Interviews and Improve Hiring Effectiveness," outlines the steps companies need to take to ensure they have an effective hiring process in place and are bringing only A-level talent into their company. By reading this eBook, you will learn how to plan and execute a successful interview process, assemble the right interview team, ask questions to properly vet candidates, and manage feedback following interviews.

The process laid out in this eBook will require you to invest a great deal of time and attention into your hiring process. However, even if that process saves you from making just one bad hire, you will find it to be worthwhile.

William Tincup
CEO of HR Consultancy, Tincup & Co.

[1] "Two Thirds of U.S. Employers Say Bad Hires Negatively Affected Business Last Year," The Hiring Site, May 13, 2013.

[2] "Retaining Talent. A Guide to Analyzing and Managing Employee Turnover," SHRM Foundation.

CHAPTER 1:

WHAT ARE THE COMPONENTS OF AN EFFECTIVE INTERVIEW PROCESS?

Before diving into the mechanics of interviewing best practices, it's important to first understand the core components of an effective interviewing process. To do so, you need to answer the following questions:

- Who should be involved in the interviewing process and what is each person's responsibility?
- Which style of interview should you use?
- What interview format or medium is most appropriate for your hiring needs?

This chapter will help you answer those questions and provide the insight necessary to execute an interview process that will allow you to more effectively identify, filter, and vet the talent your growing business needs.

The Key Roles and Responsibilities for a Well-Managed Interview Process

Generally, there are two main functional roles that must be assigned before you begin a candidate search — a point person who will lead the hiring process, and a team that will support that person by conducting interviews. More specifically, each of those roles has the following responsibilities:

Point person: Typically a hiring manager or an internal recruiter, this person is responsible for driving the hiring process, including communicating the interview process, feedback, and next steps with both candidates and the interview team.

Interview team: Once the point person is in place, he or she must assemble the interview team. In addition to the hiring manager, this group may include the candidate's future peers, the company's management team, HR representatives, or board members. The exact makeup of the interview team will vary depending on the nature of the role you are hiring, an issue that we will cover in greater detail in Chapter 2.

For checklists of responsibilities for each of these roles, see page 23 in the Appendix.

To be successful, it's critical that the interview team understands its role in the hiring process, and agrees upon the profile of the candidate it will look for. Doing so ensures that a consistent message is relayed to applicants. Additionally, the point person should also make it clear that hiring decisions do not need to be unanimous. Ultimately, it's up to the hiring manager to digest feedback from the interview team and to make a decision that he or she thinks is best for the company and the role being filled.

All of these functional roles must be determined at the start of the search so that everyone understands what they need to do in the hiring process, and to ensure that it is standardized for all candidates. Having the point person and interview team in place will help streamline the process so that candidates are not pulled into additional rounds of interviews unnecessarily.

3 Interview Styles (and How to Decide Which One is Right for You)

Depending on the role you are hiring for, your interview team, and timeline, there are several different interview styles that may be utilized for a single interview process. Below are three common interview styles that are particularly effective.

TRADITIONAL INTERVIEWS

Typically conducted as phone screens, traditional interviews follow the progression of a candidate's career, using the candidate's resume as a basis for asking questions. This type of interview focuses on the candidate and his or her background and is used to screen candidates based on predetermined job requirements and to gather initial data. Use traditional interview techniques to obtain clarity on a candidate's motivations, career decisions, skill set, credentials, career progression, and cultural fit. In addition, determine whether or not the candidate possesses both the intrinsic and concrete qualifications necessary to be successful in the role.

For instance, during the phone screen, you should try to uncover a candidate's motivation for considering new opportunities, interest in the position and your company, timeline for starting a new role, and compensation history and requirements. More specifically, a traditional interview should be used to probe for the following information:

Timeline: A large portion of a candidate's decision to move from one company to another is timing. Ask questions to determine if anything is anchoring the candidate to his or her current company, or if there is anything that would prevent that person from accepting the opportunity. It's important to ask these questions to determine how invested a candidate is in making a move. The goal is to uncover potential obstacles such as a significant year-end bonus, a planned six-week sabbatical, a possible upcoming promotion, or anything else that could potentially delay or prevent them from accepting an offer.

Job search activity: Whether candidates are passive or active in their search, they may be currently considering opportunities with other companies. Ask candidates if, and where, they are in process with other opportunities to avoid surprises later on. If the candidate is about to receive another offer and you have just started your interviews, you may want to expedite scheduling future interviews or remove them from the process if your internal hiring timeline cannot move quickly enough.

Compensation requirements: When asking for a candidate's current compensation and compensation requirements for accepting a new position, acquire a total breakdown, including base salary, variable, and any equity options. Be aware of the compensation range for the open role. If the candidate's requirements and/or current earnings are outside of the hiring budget and there is no flexibility, explain this to the candidate. If the candidate is unwilling to consider a lower package, do not move the person through the process.

The information above should only serve as a high-level candidate filtering mechanism. As your interview process progresses with subsequent phone screens and onsite interviews, your interviewers will begin to dive into performance indicators through the use of behavioral and skill-based interviews, which are outlined further below.

"Hiring intelligent, adaptable people who embody your core values is everything. Let this eBook serve as a guide to help you attract your future generations of 'A' players and leaders."

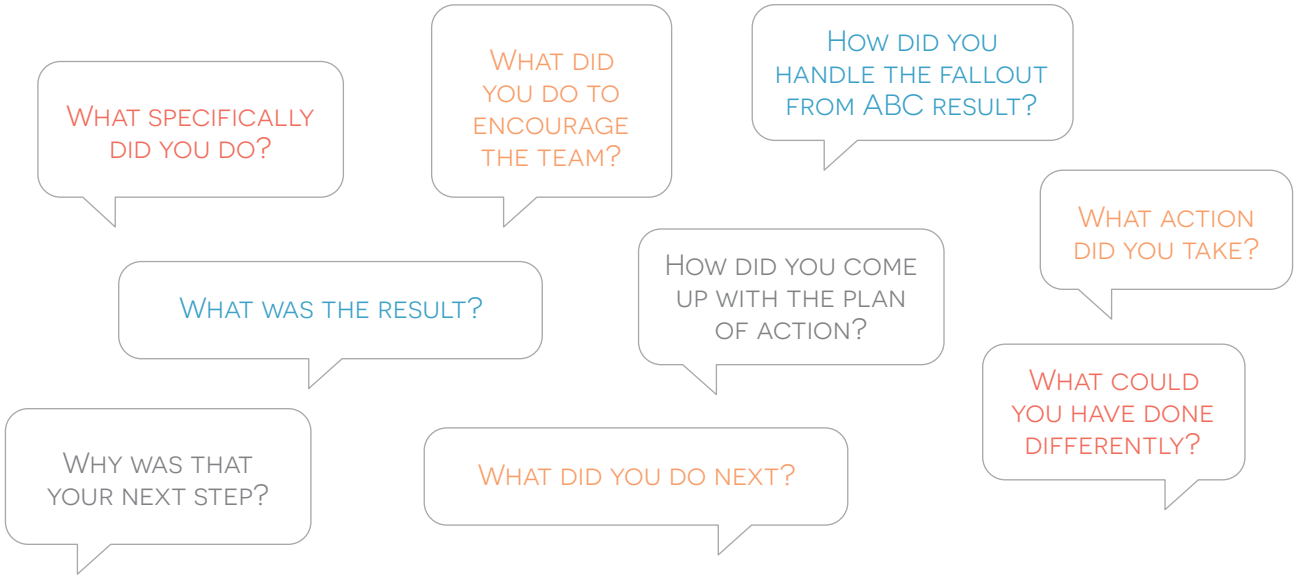
Ben Russell, VP People, Monetate

BEHAVIORAL INTERVIEWS

The principle behind behavioral interviewing is that past behavior and experience are often indicators of future behavior, and therefore future performance. This method is most often used to evaluate specific competencies that are deemed fundamental to achieving success in the role. At a high level, a behavioral interview focuses on the skills and abilities that will lead to high performance. It is a line of questioning that gathers information on how a candidate handled a specific situation, what actions he or she took, and what the end result was. You will find examples of behavioral interviewing questions later in this chapter.

Question topics will vary based on the role and competencies that are being screened. The more you are able to diversify questioning to achieve a balance of moderate scenarios with challenging ones, the broader the insight you will gather. The goal of behavioral interviewing is to understand how candidates have responded to roadblocks, opportunities, accomplishments, and failures.

Probing questions are essential to push the candidate to move beyond the surface and to provide more relevant detail. After a candidate's response to an initial question, probe further and challenge him or her to be more specific. For example, ask follow-up questions such as:



Importantly, behavioral interviewing is only effective if you follow the BAR (background, action, result) method. As an interviewer, your job is to push candidates to provide explicit details about the background of each situation, the action they took, and the end result, since this will provide you a better understanding of how they may handle similar situations if they were to join your company.

To develop a list of behavioral interview questions, use the list of core competencies that you develop during the search kickoff (which we will discuss in Chapter 2). Keep in mind that one behavioral interview question may pertain to multiple competencies. You should ask multiple questions for each competency to ensure consistency, and questions should be as specific as possible to the activities performed in the position.

Here are some examples of behavioral interview questions for common competencies to use as a reference guide when creating a list of behavioral interview questions for your search:

Agility:

Can you tell me about a project that did not go according to plan? What corrections did you make, and what were the results?

Working effectively with others:

Would you tell me about a time when your team was veering off track and how you were instrumental in bringing the team back in focus? What did you do to ensure there wouldn't be more derailments?

Efficiency and organizational skills:

What is your process for prioritizing responsibilities? Can you provide an example? What could you do to be more efficient?

Accountability and leadership:

Can you describe in detail a project (or cite a specific project that this candidate was responsible for in a past role) that you were responsible for? How did you carry out the project and what were the end results?

Critical thinking and decision-making:

Can you describe the steps you go through to make an important decision? What examples can you provide?

During a behavioral interview, it is important to briefly document the candidate's response to ensure you have uncovered the necessary detail. This information can then be used in your final decision-making process.

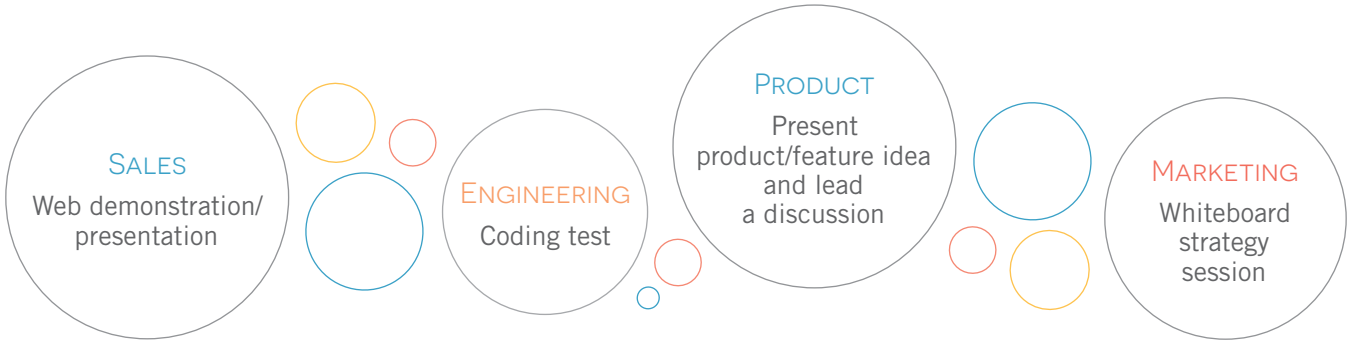
SKILL-BASED INTERVIEWS

While behavioral interviewing allows you to gain a deeper understanding of past performance, the most effective interview style for accurately assessing a candidate's true abilities is a hands-on, skill-based interview.

This type of interview provides an opportunity to see a candidate in action, better understand how that person evaluates himself or herself, and observe how the candidate responds to critiques.

The skill-based interview method is most useful for roles in which the candidate could not perform the job well without these specific skills. For instance, if you are hiring an engineer who will be working with a specific technology and would need a certain level of skill to successfully make an impact in the role, a skill-based interview can be highly effective as an indicator of performance.

The specific type of skill-based interview you use will vary depending on the role and the skills being tested. Here is a sample of skill-based interviews that you might use for different groups within your software company:



Deciding on the Right Interview Structure and Medium

In addition to considering what type of interview format to use, it is also important to consider the appropriate interview structure and medium for each position you hire for.

For example, if a candidate will need to meet with a large number of individuals, or a team, you might use group interviews to streamline the process. When conducting group interviews, the individuals participating should meet in advance to determine who will focus on which core competencies during the interview in order to ensure all areas are covered. Group interviews should be used when the candidate is meeting with peers or direct reports. If, on the other hand, you are having a candidate meet with the executive team or an employee the hire will work closely with, opt for interviews with a more individualized focus.

Similarly, the medium you use for interviews is important and may vary based on the position you are hiring for. For example, here are three possible mediums and how they might be used:

Phone: Phone interviews are used as the initial screen with the recruiter and/or hiring manager as well as for initial interview team interviews if the candidate is not local and/or if the role requires a high volume of phone interaction. For example, if you are interviewing sales candidates, much of their job will likely be conducted over the phone. To get a clear understanding of the candidates' energy, demeanor, and closing skills on a call, implement a series of phone-based interviews.

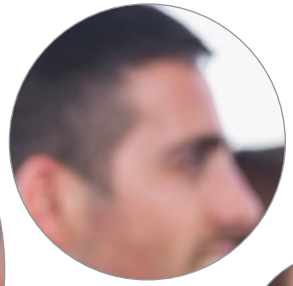
Video/Skype: Video interviews are a potential medium to use in place of a phone or first onsite interview if the candidate or a member of your hiring team is not local. They give both the interviewer and the candidate a warmer, face-to-face interaction without incurring travel costs.

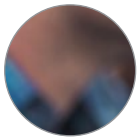
In-person: In-person interviews are highly recommended for all potential hires. It's important for candidates to come onsite to see how they interact with each member of the interview team and anyone they come in contact with at your organization, from the receptionist to the CEO. It's also important to showcase the culture of your organization firsthand, and to get more clarity around whether or not the candidate will be comfortable and a cultural match. If a candidate isn't local, and will be working remotely, it is best practice to either bring the candidate into the office, or for the hiring manager or a member of the hiring team to travel for an in-person meeting.

Laying the Groundwork for Successful Execution

After reading this chapter, you should have a clear understanding of the roles and responsibilities that are required to effectively manage the interviewing process, as well as the various techniques and formats that can be used to best facilitate interviews for specific jobs.

In the next chapter, we will outline seven steps that will help you prepare for and conduct more effective interviews. The chapter also includes a sample scorecard for grading interviews based on core criteria, a list of common interviewing obstacles to avoid, and a fictitious sample case study of how a software company conducts a search for a sales director.





CHAPTER 2:

7 STEPS TO A MORE EFFICIENT, HIGH-IMPACT INTERVIEW PROCESS

To avoid making a hiring mistake, respondents to a 2013 Career Builder survey[3] revealed that they often delay extending offers to qualified candidates so they can spend more time assessing whether that person is truly a good fit. The problem with that added diligence, however, is that if your business is targeting top talent, the best candidates may not wait around while you try to dig up more information about them.

A more effective hiring approach is to incorporate that level of diligence into every step of your interviewing process — from the moment you kick off a search to the final step of conducting reference interviews.

This chapter will help you increase your efficiency. It describes a relatively simple step-by-step process for outlining the core competencies of the candidates you want to attract, assembling the right team to source and interview them, and conducting an interview process that will yield all of the information you need to make the right hiring decision.

[3] "Two Thirds of U.S. Employers Say Bad Hires Negatively Affected Business Last Year," The Hiring Site, May 13, 2013.

CASE STUDY:
PROLABS' SALES DIRECTOR SEARCH

Meet Tanya, a fictional VP Sales at ProLabs, an expansion-stage software company in California. Tanya would like to expand her outside sales team and has budget approval to add three new sales directors to her organization.

Throughout this chapter, we will follow Tanya as she selects an interview team and determines her hiring criteria. We will then follow a member of the ProLabs team as they prepare for and conduct interviews, giving examples along the way.

CASE STUDY: PROLABS' SALES DIRECTOR SEARCH

In preparation for kicking off the search, Tanya evaluates the role, determines the core competencies she is looking for in successful candidates, and creates a list of criteria necessary for success. Her list of criteria includes:

- Good cultural fit for ProLabs and her team
- Is located within one of the open territories (Northwest, Southeast, Southwest)
- Has a high degree of drive and motivation
- Is a top producer with a track record of exceeding quota
- Possesses strong problem-solving and critical thinking skills
- Is an excellent communicator and able to think on his or her feet
- Able to build partnerships
- Successful at facilitating change

Step 1: Identify What You're Looking for in a Candidate

Before the interview process can begin, it's vital that you know what you want in a candidate. If the role, responsibilities, or skills required are not clear (nor agreed upon by the hiring team), it will be impossible to hire the right person.

The hiring manager should outline the core competencies, previous experience and skill requirements, performance indicators, and any intrinsic qualifications that are fundamental to success in the position. Remember that the right hire will also have the intangible soft skills needed to succeed within both your company's and team's culture. Ideally, this exercise will result in a list of six to eight critical measures that will serve as the criteria for the interview process.

To ensure you are targeting the appropriate criteria for the role, match each with a specific performance objective and/or skill, and create a simple scorecard to assess and rate candidates during the interview process. Scorecards help establish consistency and objectivity throughout the hiring process.

Scorecards list the performance indicators that have been determined alongside a standardized rating scale. Keep in mind that each competency may not hold the same importance and will therefore be weighted differently. By using a scorecard, candidates are rated on specific answers and behaviors, as opposed to gut feelings or assumptions that can unintentionally affect hiring decisions. See page 26 in the Appendix for a sample scorecard template.

CASE STUDY: PROLABS' SALES DIRECTOR SEARCH

Tanya has asked Rob, Talent Specialist at ProLabs, to be the point person for the search. During the kickoff for the search, Tanya and Rob discuss the competencies and criteria for the search that she has identified. Tanya also asks the following additional individuals to be part of the interview team:

Timothy, a Sales Director and future peer of the new hires

Kristina, the Manager of Sales Operations, who works closely with the entire sales organization to develop the functions and processes critical to its effectiveness and productivity

Step 2: Designate Who Should Be On Your Interview Team

After you have clearly outlined the qualities and capabilities you will be looking for in candidates, the next step is to form the hiring team that will be responsible for ensuring candidates are evaluated according to the previously outlined competencies.

The hiring team should include:

1. An individual who has a clear understanding of the role you are hiring for and its expected contribution to the organization.
2. An individual who has the technical and functional expertise to qualify the candidate based on his or her skills. This person may be a peer, hiring manager, executive, or board member.
3. Direct reports, using either a group interview with the team or a single individual to represent the team.
4. Any individuals who will work closely with or interact with the hire on a regular basis.

Step 3: Determine the Interview Process

Once the interview team is in place, you need to determine the progression of the interview process, including the format and logistics of each interview. A sample interview process is outlined below:

WHAT	WHO	HOW LONG	WHAT TO COVER
Phone Screen	Recruiter followed by the hiring manager. If there is no recruiter in place, one phone screen with the hiring manager should suffice	30 minutes	Utilize **traditional interview** questions to assess the candidate's: » Overall career progression » Skill set and experience as they relate to job requirements » Intrinsic qualifications and cultural fit » Motivation regarding the opportunity, and new opportunities in general » Search activity (i.e., whether the person is in final stages with another company) » Timeline » Compensation history and requirements
Onsite Interviews	Hiring manager and the remainder of the interview team	30 minutes to 1 hour per person	Use a combination of **traditional and behavioral interviewing** questions to inquire about past performance in specific situations and to assess: » Specific skills (including presentation and communication skills), experience and motivations » Cultural fit with team
Presentation	Hiring manager, other relevant team members	30 minutes to 1 hour	Use **skill-based interviewing** tactics to asses: » Technical skills » Presentation skills » Communication skills
Reference Interview	Hiring manager or recruiter	15-30 minutes	Use the reference interview to determine the candidate's job history, professional relationships, previous performance, growth potential, and advice for how to best manage the candidate should he or she be hired

The number of members on your interview team will help determine the process and progression of interviews. While it is important that each candidate meets with members of the four groups listed in Step 2, when determining your interview team, ensure that you are being efficient and effective with the team's and the candidate's time. It's not necessary for a candidate to meet with multiple peers or multiple direct reports, unless you will be doing so in a group interview.

CASE STUDY: PROLABS' SALES DIRECTOR SEARCH

With the interview team in place and briefed on the search and their role in the hiring process, Rob has outlined a progression of interviews for the sales director search as follows:

- Initial phone screen with Rob, Talent Specialist
- Second phone screen with Tanya, VP Sales
- Phone interview with Kristina, Manager of Sales Operations
- In-person interview with Tanya, VP Sales*
- Virtual presentation with Tanya, Kristina, and Timothy, Sales Director

*Tanya will fly out to meet the sales director candidates in person, since they are located within their territories and will work remotely.

Step 4: Compile the Best Questions

Preparation is the key to an effective interview. Regardless of the type of interview being conducted, your interviewers should come to the interview with a set of predetermined questions. To determine the right interview questions to ask, the interviewer should follow these steps:

1. Review the resume and any additional information you have on the candidate (e.g., LinkedIn profile, samples of their work, etc.).
2. Create a list of questions based directly on the candidate's experience, career moves, and technical skills.
3. Use the list of competencies and performance indicators to determine the questions that best evaluate if the candidate meets these requirements.

Interviews are a conversation, and can easily veer off course if you do not plan ahead. Planning and reviewing questions prior to the interview and documenting shorthand responses during the interview will allow you to reference what has been covered and help ensure that you do not miss any key competencies during the process.

William Tincup's Favorite Interview Question:

"Everyone is misunderstood… how are you misunderstood?"

CASE STUDY: PROLABS' SALES DIRECTOR SEARCH

Kristina, Manager of Sales Operations, is gearing up for a phone interview with Jason, a candidate for the sales director role in the Southeast. Prior to the scheduled interview, she is reviewing information on the candidate and creating her list of questions to ask.

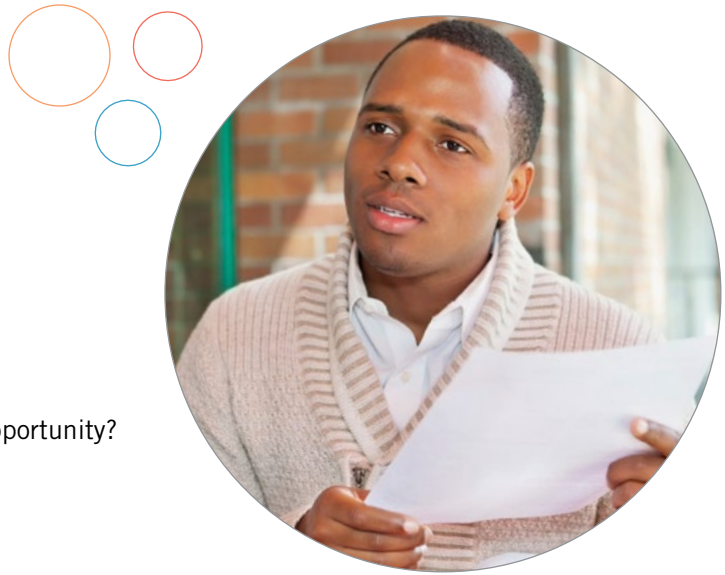
Based on Jason's resume and LinkedIn profile, Kristina has created a mix of traditional interview questions and behavioral-based interview questions such as the example questions om the following page.

Traditional Interview Questions:

- I'm not familiar with your current company. Can you provide detail on it?
- Over the course of the last four years:
  - Have you been given a book of business? How much of your role is focused on signing new logos? What happens to an account once you have signed it? Which new logos have you signed on?
  - Who is the buyer you are selling into? How do you go about getting on this person's radar?
  - What is the average deal size (company vs. your average)? Quota? Quota attainment? How is this broken down (new logos, net new business, renewals)?

Behavioral Interview Questions:

- Walk me through the last deal you won from start to end:
  - How did you find and engage the customer?
  - Why did you go after this customer?
  - What was the make-up of the decision-making team?
  - How did you get into the company and in conversations with the decision makers?
  - How did you get buy-in from the decision makers?
  - What were the pain points the company was facing? How did you cultivate these pain points and turn them into an opportunity?
  - What was the timeline for this deal?
  - What resources did you pull in throughout this sales cycle?



For additional sample questions, click here.

CASE STUDY: PROLABS' SALES DIRECTOR SEARCH

Kristina brings her list of questions and scorecard to her interview. While asking her questions, she jots down shorthand notes based on each criteria measure.

Immediately following the interview, Kristina fills out the scorecard with ratings for each criteria, notes strengths and weaknesses to justify each rating, adds summary comments, including concerns to dig deeper on in a future interview, and her view on whether or not to hire the candidate. She will provide this information to Tanya and Rob for review.

Step 5: Conduct the Interview

Preparation is one half of the interview process and execution is the other. As you begin to conduct interviews, it is important to adhere to an ordered format that includes the following four steps:

1. Introduction: Introduce yourself, your role within the team, and the team's function within the company.
2. Overview: Set expectations up front in regard to what you would like to accomplish in the interview by informing the candidate what you would like to go over during the interview.
3. Evaluation of candidate: Begin asking questions, testing the candidate's capabilities, providing information about the position, and answering any questions the candidate might have. This step should take up the majority of the interview.
4. Close: End the interview by thanking the candidate and providing a timeline for feedback and next steps.

Throughout the interview, the interviewer should take detailed notes about the candidate's strengths and weaknesses and subsequently rate the candidate's competency and performance using a scorecard like the one on page 26 in the Appendix. If you are conducting an in-person or video interview, it may be difficult to take detailed notes. Be sure to draft your notes immediately following the interview. Interviewers must also provide the hiring manager with an overall assessment of whether or not to move forward with each candidate. Each interviewer is accountable for the rating they give to a candidate, and may be asked to provide specific examples of determinants for each score.

Keep in mind that interviewing is a balancing act. Just as you are interviewing for the best hire, candidates are interviewing for the best opportunity. They are assessing your opportunity and how it measures up to what they are looking for in a position, company, management team, compensation and benefits package, career path, and company culture. They want to understand your employee value proposition — the balance of rewards and benefits employees receive in return for their performance in the workplace.

A recent study by CareerBuilder found that 29 percent of job seekers don't think employers do a good job of reinforcing why their companies are a good place to work throughout the interview process.[4] In addition, only 38 percent of employers believe their company has a clearly defined employment brand. To combat this, ensure that the interview team devotes time to addressing your employee value proposition, selling the opportunity, and ensuring that each candidate's interview experience is a positive one.

"The employee value proposition is a key part of the interview process to win talent in a highly competitive market. Members of the interview team should have a strong and cohesive understanding of your company's value proposition, and the ability to showcase this to prospective candidates in a compelling way. After all, each individual on the interview team is a representative of the company, and these questions come up far more often than you think."

Carlie Smith, Talent Specialist, OpenView Venture Partners

Step 6: Complete Post-Interview Debrief

The point person should schedule a debrief session with the hiring manager within 24-48 hours of each interview. During the debrief conversation, the hiring manager and point person will review the scorecard from the interviewer, and, if necessary, bring in the interviewer to discuss feedback with that person. At this time, it will be determined if the candidate will move forward in the interview process, or be declined for the role.

Once all interviews are complete, the hiring manager and point person will meet to compare impressions from each interview, discussed in the step above. In this meeting, strengths, weaknesses, potential, motivations, and any ambiguity will be outlined and discussed. If at the end of the interview process there is still ambiguity around any points, the hiring manager will step in to have an additional call/meeting with the candidate.

Once final candidates are selected, it's time to conduct reference interviews.

[4] "New CareerBuilder Study Reveals Nine Lessons for Job Seekers and Recruiters That May Surprise You," October 17, 2013.

Step 7: Conduct Reference Interviews

No matter how certain you may feel about a candidate's viability, it is vital to contact references.

The reference interview is an opportunity for the hiring manger to speak directly with a former manager of the potential hire and obtain additional detail on that candidate's work history, professional relationships, and performance. Reference interviews will provide insight into how a candidate is best managed and where you may need to provide additional support or training. In reference interviews, probe managers to provide specific examples of successes and failures, and how the candidate has responded to each situation. We recommend obtaining a minimum of three to four references, with at least two former supervisors.

Just as you would for a candidate interview, take the time to prepare for a reference interview by doing two things:

1. Schedule the reference interview. Take the time to coordinate a time to speak with the reference to ensure the reference is prepared.
2. Create a list of questions to ask the reference. Use the reference check guide on page 28 in the Appendix as a foundation, but be sure to supplement this guide with your own questions, based on feedback from candidate interviews.

Reference interviews should be conducted prior to extending an offer, though in certain cases, depending on timing, you may make an offer contingent on positive references.

Once references are complete, the hiring manager will use everything he or she has learned in the interview process as a component of the decision to make an offer.

"Reference interviews are one of the most important — yet often overlooked — parts of the entire interview process. This is your opportunity to gain valuable insight into a candidate's performance directly from those they've worked with previously, and to learn from former managers how you can quickly ramp up and best manage the candidate for success if they are hired. Reference interviews are only as valuable as you allow them to be, so prepare ahead of time to get the most you can out of them, and pay close attention to any lukewarm endorsements."

Diana Martz, Director of Talent, OpenView Venture Partners

CASE STUDY: PROLABS' SALES DIRECTOR SEARCH

Tanya and Rob have reviewed Kristina's scorecard from candidate Jason's presentation. Not only did he have the highest overall score, he proved to the team that he possessed all of the core competencies necessary to succeed in the role and that he will be a valuable addition to the company's sales effort. Rob subsequently reached out to get the contact details for Jason's references, which he passes along to Tanya so that she can conduct the reference interviews.

The reference interviews yield great feedback and Tanya ultimately decides to extend an offer to Jason.

To learn more about recruiting, including in-depth information on how to prepare and extend an offer, check out "Get More Talent: How to Build the Talent Factory Your Company Needs to Scale."

END NOTE

For an expansion-stage technology company to efficiently scale, it must be able to find and hire the best available talent as quickly and efficiently as possible, and it needs to do so without frequently committing the costly mistake of making a bad hire. While that's no easy task, it can be done.

The interviewing model and techniques discussed above should help your company better organize its hiring process, and ensure that your team properly qualifies candidates from the first point of engagement until the final step of delivering an offer. Ultimately, this process will improve your probability of hiring the right people in the right roles, and allow you to derive numerous tangible and intangible benefits — not the least of which include higher productivity and company morale, and significantly lower employee turnover.

It is important to note, however, that interviewing is just one component of an overall hiring process. To truly extract the most value from your talent acquisition processes, when the time is right your company should consider building a talent factory — a high-output team and infrastructure that is solely responsible for identifying, attracting, hiring, and retaining top talent. For more information on that process, check out "Get More Talent: How to Build the Talent Factory Your Company Needs to Scale."

APPENDIX

Checklist for the Hiring Manager

As the hiring manager, I am responsible for identifying the search criteria as it relates to performance objectives, informing the interview team of their role in the search and interview process, being available for ongoing communication with the point person for the search, and ultimately making the hiring decision.

- ○ I have identified and defined the search criteria fundamental to success within the position, have matched each competency with performance objectives for the role, and have shared this information with the point person for the search.
- ○ I have identified the interview team and communicated with the interview team an overview of the position, their role within the interview process, and criteria to interview against.
- ○ I am in regular contact with the point person providing feedback on candidates and resumes that have been passed forward.
- ○ I have met with the point person to review individual interview scorecards and overall candidate scores and make decisions to move candidates forward in the process based on that feedback.
- ○ I have conducted reference interviews.

Checklist for the Point Person*

As the point person for the search, I am responsible for driving the hiring process, including communicating the interview process, feedback, and next steps with both candidates and the interview team. I will work closely with the hiring manager to hire the best candidate for the role we are seeking to fill.

- ○ I have met with the hiring manager to discuss the role, determine competencies and overall search criteria, identify the interview team, and determine the interview process.
- ○ I have created a scorecard based on these core competencies for the team to use as a tool during interviews.
- ○ I have kept in regular communication with candidates and internal stakeholders to update them on the search and interview process.
- ○ I have gathered feedback from scorecards as each interview is conducted.
- ○ I have created overall scores based on the scorecards and have met with the hiring manager to discuss feedback and determine next steps after each interview.
- ○ I have gathered reference information and shared it with the hiring manager.

*If the hiring manager is also the point person for the search, he or she will add the following items to his or her checklist.

Checklist for Other Members of the Interview Team (Interviewers):

As an interviewer, I am responsible for providing candid feedback based on set criteria for the position and will work closely with the point person on this search to provide input on candidates.

- ○ I have met with the hiring manager/point person to understand the job responsibilities of the hire, as well as performance objectives and criteria that I will be interviewing against.
- ○ I have received a scorecard from the point person to use as a tool for notes and feedback during my interviews with candidates.
- ○ I have a strong understanding of the company's employee value proposition.
- ○ I have reviewed the candidate's resume and additional information (LinkedIn, portfolio, etc.) and have created a list of traditional interview questions to gain clarity on experience, motivations, skills, career moves, and other quantitative data prior to my interview.
- ○ I have reviewed the search criteria and performance objectives and created a list of behavioral-based interview questions and probing questions to use while conducting the interview.
- ○ I have filled out the scorecard with ratings and specific notes on strengths/weaknesses and my overall hiring assessment on the candidates and provided this feedback to the point person for the search within an agreed upon timeframe.

Sample Scorecard Template

A scorecard is an evaluation tool used by a hiring team to assess and rate candidates.

CANDIDATE NAME: _____

POSITION: _____

INTERVIEWER: _____

RATING SCALE: 5=OUTSTANDING 4=ABOVE AVERAGE 3=AVERAGE 2=WEAK 1=NOT ACCEPTABLE

CRITERIA	RATING	STRENGTHS	WEAKNESSES
CULTURAL FIT			
Cultural fit with existing team and management			
DRIVE & MOTIVATION			
High degree of self-motivation and determination to drive new business sales			
Consistent track record of prospecting and closing new logos within F1000 accounts			
Personal career goals and achievement or on the way to achieving these goals			
TOP PRODUCER			
Track record of sales success in a B2B SaaS company			
Demonstrated history of exceeding quota			
Leverages resources effectively and wisely			
Focuses on delivering measurable results by driving change			
Focuses on a quality sales process from prospect to close			

CRITERIA	RATING	STRENGTHS	WEAKNESSES
STRONG PROBLEM-SOLVING AND CRITICAL THINKING SKILLS			
Ability to cultivate and evaluate pain points and turn them into selling opportunities			
Takes a consultative sales approach using business-use cases as a core selling point			
Creativity, ability to synthesize			
COMMUNICATION AND ORGANIZATION			
Able to communicate effectively in high-stress situations			
High energy			
Demonstrates propensity to juggle multiple competing priorities and demands in a fast-paced environment			
Maturity and confidence			
BUILDS PARTNERSHIPS			
Forges strategic partnerships with key prospective clients to grow new business			
Focuses on relationship building with clients and internal teams in an open, honest, and direct manner			
OVERALL DECISION TO HIRE:			
SUMMARY COMMENTS:			

Sample Reference Check Guide

Reference questions will vary by position. This format is intended to provide a general guideline for reference checking.

Candidate Name:

Date:

Reference Name:

The Reference:

1. Confirm the reference's title and career track
2. How long have you known the candidate? In what context?

Candidate Job History:

1. To what position did the candidate report? What roles (if any) reported directly into the candidate?
2. Can you describe the candidate's general responsibilities?
3. What was the candidate's total compensation? What was the base and the bonus breakdown (Note: Applicable if the reference was a superior and it is known)
4. What are the standards of successful performance in the candidate's role?
5. Describe how the candidate met these standards.
6. Describe any key achievements or discrepancies that occurred during the candidate's tenure in the role.

Professional Relationships:

1. At (Company Name), how was the candidate regarded by…?
    a. Superiors:
    b. Clients:
    c. Peers:
    d. Subordinates:
    e. Describe the candidate's approach to managing, training, developing, and evaluating subordinates.

Performance:

1. How would you rate the candidate's…?
    a. Technical and functional skills
    b. Organization capabilities (time management, meeting deadlines, meeting budget, etc.)
    c. Staff development capabilities (coaching, mentoring, developing, evaluating)
    d. Communication skills (oral and written)
2. What do you consider the candidate's key strengths to be?
3. What do you consider the candidate's weaknesses to be?
4. How would the candidate best be managed?

Growth Potential:

1. What is the candidate's growth potential? How far do you envision this person going professionally?
2. Do you have any concerns about the candidate's ability to succeed in the role we are considering them for?

Additional Probe:

1. Is there anything else you would like to add?

Common Challenges Found in the Interview Process and Potential Solutions

CHALLENGE	SOLUTION
Unplanned rounds of interviews are being added on to the interview process at the last minute	Stick to the interview process that has been determined at the search kickoff. In interviewing, there is the potential to add additional candidate meetings should the point person or hiring manager feel it is needed to close the deal, answer any important remaining questions, or if a candidate asks to speak with a peer and/or hiring manager for more information. Other than these interviews, the progression should be set.
Receiving minimal feedback from interviewers	Let the interviewers know up front that you will be looking for specific examples based on each of their ratings on the scorecards and that their feedback is critical in order to ensure that you are hiring the best candidate.
Lack of consistency in expectations/ interviewers looking for different things in each candidate	Using the scorecard, interviewers will rate candidates based on the specific criteria listed. They may have an overall view on what is needed in a candidate, but will still score each candidate based on the scorecard criteria. Additionally, it's important that the hiring manager or point person discusses the expectations of the role and of the ideal candidate upon asking someone to be a part of the interview team.
Interviewers automatically agreeing with the feedback of a more senior member of the team	Before facilitating a discussion with the interview team, gain feedback from each interviewer separately. This will allow for unbiased feedback from each individual.
Delayed feedback	When the interview team is selected, the hiring manager should ask for a commitment that members will provide feedback within 24-48 hours of an interview. Should that feedback not be provided, the point person should consistently follow up and involve the hiring manager should feedback not still be received.

Obstacles to Avoid in Interviewing

Leading Questions

In behavioral interviewing, it can be easy to ask leading questions that guide the candidate to the answer you are hoping for. For example:

"Collaboration is a big part of our culture here at this company.
Tell me about a project that involved multiple team members and what role you played."

To avoid candidates reiterating the information that you've provided, do not preface questions with the competency you are asking about. Instead, ask the question first and then provide detail in regards to the role or organization once you've received a response. This will help the interviewer get an understanding of the candidate's behaviors without providing the candidate with the clues they are looking for to give the desired response.

Filling the Silence

While conducting behavioral interviews, it's also important to avoid the temptation and comfort of filling the silence. When an interviewer first starts deploying behavioral interviewing tactics, this silence can be awkward, as it's in our nature to fill pauses with conversation. Instead, allow the candidate time to recall an event and think about how to respond. You can also tell the candidate that you are going to give them time for their replies.

Group Effort Responses

Beware of candidates who do not answer in the first-person, instead using "the team" or "we" in their responses. In these cases, probe deeper by asking "what was your role on the team?" or "what specifically did you do?"

Hypothetical Interview Questions

Limit your hypothetical questions such as "If you had multiple deadlines at the same time, how would you prioritize them?" These types of questions can be helpful in understanding how a candidate's decision-making or thinking process works, but that's about it. A better way to ask would be "Provide an example of when you had multiple deadlines to meet. How did you prioritize the work?"

First Impressions

Research shows that an interviewer is more prone to ask questions and make assumptions with a positive spin if a candidate has made a positive first impression. On the other end, if the first impression is negative, the interviewer may spend the remainder of the interview looking for ways to discount the candidate. Some candidates are better at promoting themselves than others. Some people are just good interviewers and communicators, but the best interviewer may not be the best hiring choice, so be careful not to let your first impression dictate the interview.

"Like Me" Effect

Whether consciously or not, people tend to want to hire people like themselves, as they can easily relate and feel more comfortable with them. Don't let this skew the data on how a candidate stacks up against your requirements. Use the interview methods above to keep your interview objective.

Halo Effect

Similarly, the Halo effect (i.e., the assumption that because someone is good at A, he or she is therefore perceived to be good at B) should be brought to the attention of the interview team. For example, a candidate who is a great communicator may be unfairly perceived to be great at sales. There is much more to a successful sales executive than solid communication skills, and the interviewer must interview based on all competencies and skills without passing judgment based on one.

Illegal Interview Questions

AREA OF INQUIRY	ILLEGAL	LEGAL
Work/Visa Status, Nationality	» Are you a U.S. citizen? » Where are you from? » Where were you born? » Is English your first language? » What is your native language?	» Are you authorized to work in the U.S.? » Can you show proof of your eligibility to work in the U.S.? » This job requires someone who speaks more than one language. What other languages do you read, speak or write fluently?
Family and Marital Status	» Are you married? » Do you have children? » How many children do you have? » Do you plan to have children? » What childcare arrangements do you have? » Have you been divorced? » Who is your closest relative to notify in case of an emergency? » What is your maiden name?	» Are you willing and able to put in the amount of overtime and travel the position requires? Are you willing to relocate? » What hours and days can you work? » Do you have responsibilities other than work that will interfere with the specific job requirements? » In case of emergency, who should we notify?
Age	» How old are you? » What year did you graduate? » How long have you been working?	» Do you have any concerns about working the long hours and travel schedule that this job requires?

AREA OF INQUIRY	ILLEGAL	LEGAL
Health, Disability Status, Physical Ability	» How is your health? » Are you pregnant or planning to become pregnant? » Do you have any disabilities or medical conditions? » Do you smoke/drink? » Do you take drugs? » How tall are you? » How many sick days did you take last year?	» Are you able to perform the essential functions of this job with or without reasonable accommodation? » Do you use illegal drugs? » How many unscheduled days of work did you miss last year?
Religious Affiliation	» What is your religious affiliation? » Do you observe [insert religious holiday]? » Do you belong to a club or social organization? » Was [insert school name] a [insert religious affiliation]?	» None
Conviction Record, Arrest Record	» Have you ever been arrested?	» Have you ever been convicted of a crime?
Military Record	» Are you in the National Guard (or any reserve unit)? » What type of discharge did you receive from the military?	» What type of education, training, and work experience did you receive in the military?
Credit	» Do you own your own home? » Have you ever declared bankruptcy?	» None. Credit reference may be obtained if in compliance with the Fair Credit Reporting Act of 1970 and the Consumer Credit Reporting Reform Act of 1996

AREA OF INQUIRY	ILLEGAL	LEGAL
Residence	» How far is your commute? » Do you live nearby?	» Are you able to start work at 8 a.m.? » Are you willing to relocate?
Race, Gender, Sexual Preference	» Do you prefer to be addressed by Ms., Mrs., Mr., or Miss? » ANY question that would indicate race or color	» None

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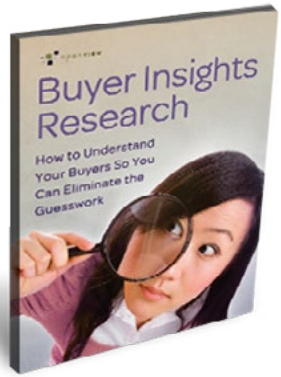

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