

## 7. Conducting The Phone Interview

### *The First Candidate Screen Step One in the Selection Process.*

The copy in your recruitment ad should have provided you with enough information to screen out many who would not be a good match for the job. Some candidates will read the ad or visit your Web site recruitment page and know they're not a good fit, and others will not think about the job's requirements and simply call your number. It will be your job to use that phone contact to help the caller and yourself determine if you should invest the time to go through the interview and application process.

*(NOTE: When candidates complete an online application, you can save a lot of time. You'll be able to choose to apply to you if you feel you want to spend time with and a candidate was not a good fit. Taking preliminary applications online also means you won't have to take the phone while you're running your help-wanted ads; you can take candidates at YOUR convenience.)*

#### **Your Goal on the Phone**

- Your goal on the phone should be to determine as quickly as possible whether or not there is a chance for a good match between the caller and your business.
- YOU SHOULD NEVER SPEND 10 OR MORE MINUTES WITH A CALLER.
- If you cannot deal with some limitations on the part of either you or the caller, set up a time to have her call back, or when you can call her back.
- **PLEASE REMEMBER THIS: THE DISCUSSION IS NOT TO SET UP AN INTERVIEW TO CONDUCT THE FIRST INTERVIEW AND EVALUATE THE CALLER AS A JOB APPLICANT.**

Once you have determined there may be a fit, you should explain the benefits of the job, and invite the caller to come in for an interview and to complete an application. If the person has already completed an application online, she should still complete a full application. You should be asking for social security numbers or previous employers' names or numbers on your online application. This also gives you the opportunity to compare what the applicant said on her online application with what she identifies on her formal, on-site application.

- If you determine there is not a likely fit, you should thank the caller for her interest, indicate you don't think the caller would be a good fit for the job, or indicate more qualified candidates have applied.

### Caller Evaluation

- Your assessment of the candidate for eventual employment begins with the phone interview. You will continue this assessment through all of the steps leading up to your final hiring decision.
- These evaluation steps are:
  1. The Phone Interview Screen
  2. The Application Screen
  3. The Personal Interview Screen
  4. Reference Checks (Employment and Personal Reference Screens)
  5. Background Checks (Driving Record and Personal History Screens)

### Caller Evaluation Sheet

- For each evaluation step, simple ratings are recommended as you develop opinions of the candidate for the job. The rating "grades" to be used are:
  - (+) A rating that indicates requirements in a category being rated. An excellent fit for the job. A success indicator.
  - (√) Meets job requirements. A success indicator.
  - (-) May be a candidate for job success.
  - (X) Candidate for the job does NOT meet minimal job requirement.

### 5 Part Phone Interview

1. You begin the conversation by your greeting, introduced yourself, ask the caller's name, ask how they heard about the position. You ask if they have a few minutes now to discuss the job or when would be a good time to talk.
2. **FINDING** about the candidate is achieved through specific, targeted end questions. At this time you are looking for "blow-out" answers that tell you to end the call as soon as possible. You are primarily trying to screen out, at this point, those who simply would not be successful.
3. **EXPLAINING** your business and the position available. During this section you want to accurately "tell" about the job. You want the candidate to honestly decide if they would be interested in this type of

work. You are actively trying to get the caller to screen themselves out of the job

4. **BACKGROUND** of the candidate is gathered through three general "open-ended" questions. These questions should help you determine if you want to make an offer to schedule an interview and complete an application.
5. **INVITATION** to fill out an application. As part of this offer, you begin to "sell" the caller on the job, the fit, and the interest.

### **The Opening**

- Use a GREETING that fits your style and tone of your company.
- Get caller's name and phone number (in case you're contacted) and need to call back. (Write this on the phone interview Screen and Evaluation Form)
- Ask how he or she heard about the position. Note the answer on the form beside "Source" so that you can keep track of the responses from your recruitment.
- Give a BRIEF description of the position. Cover the highlights that are in the AD. Promotion is the title to which the caller responded. Confirm that this position he called about and understand is available.

### **Fact Find**

- Explain that you will ask a few questions to see if the job description and major duties meet the caller's needs and interests.
- Go on to ask three "closed-end" questions that are crucial for your recruitment. **negative (X) to any of these questions should disqualify the candidate for the telephone interview.**

If the caller seems like a potential candidate, then you should proceed to give further details about the position.

### **Describe Position**

Describe the job tasks and duties in more detail relating, in particular, to the three topics identified on the Screen and Evaluation form. Ask open-ended questions, such as:

- *"How does this type of work sound to you?"*
- *"Would there be any problem with using your vehicle in connection with your job?"*

- "Do you prefer to work alone, or do you like working with others in a team effort?"
- If the caller indicates through their responses that the job sounds good for them, and you think the Reaction is positive (based on the grades you noted on the form under "Reaction to the Position"), then you can move to the next step.

### Background

- Make this section seem more relaxed and informal. Ask important questions in your most friendly style while you ask open-ended questions to get a better conversational feel for the caller.
- Ask a question that encourages the caller to talk for a while so you can get an idea about their personality, work history and how they communicate. We'll give you a couple of examples:

- "Tell me about your work history, your present employment and some other jobs you may have had."
- "What are some things you like about your present (or last) job? What are some of the things you don't like?"
- "What's the reason you ever left a job? Why did you leave?"

- Ask about the candidate's present job and past employment. What does the candidate need to do every week? What are his or her needs? Would the income from the job be enough to meet monthly living expenses, or would it be a good second source of income?

"Tell me about the amount of money you need right now."

- Pay attention to the candidate's communication skills. Look for a little "bounce" in his or her conversation. Does the applicant ask questions, and how does he or she respond to your questions?

If you hear something that causes you to "X" the candidate, then you should not include the conversation. If you think the caller is worth a further look, then proceed to the invitation.

### Invitation

- At this point, you want to summarize a few important facts you've heard from the caller. By repeating or paraphrasing some of the items you have indicated with a (+) you are letting the caller know you were a good listener and impressed with some of their qualifications.

- Tell the caller you would like to pursue a discussion that would lead to possible employment.
  - Ask the caller if she is interested in pursuing this direction.
  - Tell the caller that you would like to have a MEETING to discuss the possibility of employment. Indicate that at the meeting you would like to accomplish three things.
    1. Discuss the job further
    2. Have the candidate fill out the Application Form
    3. Discuss wages and possible start date.
  - Indicate that your schedule is quite full, but that you would like to set out a one hour meeting time on your calendar. You may not have a full hour, of course, but it will give the candidate the impression that this is an important job and you want to give her due consideration.
  - Ask the caller if he/she has a pen and paper handy, and have her write down the day, date and time of the meeting. Have them write down exact directions to your office. If those directions are not available, have her respond from your Web page. She should have printed out directions from MapQuest or whatever other direction site you've linked your online application to. If she has not printed out those directions, you should suggest she print them and should provide verbal directions to your office.
  - Also be sure the caller has written down the number they just provided for you. You may need the number if the event something comes up to you before the meeting.
  - Ask the caller if she thinks there's anything pending or that might come up that could cause her to miss the meeting.
- Thank the caller for her time and indicate your enthusiasm about her being on your company's team.

### **How to Evaluate the Responses**

- To be sure that you and we and everyone else are on the same page in terms of length when it comes to rating the responses, a brief discussion of the subject is in order
- Most ratings should be either a (√) or (-). A (+) should be used **only** when the caller's response indicates an answer to a question or reveals something about herself that **exceeds** job requirements..

- Likewise, an (X) should **only** be applied if the responses indicate a "blow-out" with respect to necessary qualifications of the job.
- For example, with respect to the Fact Finding question on driver's license and insurance, let's examine some possible responses and assessment possibilities. We're going to use two examples to illustrate how to correctly assess alternate findings and responses on the Screen & Evaluation Form.

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**Fact Finding Topic: Vehicle, License & Insurance**

Possible Findings:

How to Rate:

Caller says she has valid driver's license, a 7 year old Toyota sedan in good order, and has comprehensive liability insurance.

✓ Rates a (✓) because the response meets the requirements of the job.

Caller has valid license, insurance, and a Mazda Miata (two seater).

- Rates (-) because even though assigned to a salesperson's team, the vehicle is not big enough to hold a large equipment supply.

Has late model sedan, suitable vehicle, insurance and has never even had a parking ticket, let alone a moving violation.

+ Rates (+) because driver's record is validated and meets requirements of the job.

Caller has valid driver's license but no car.

Unless you provide a company vehicle, this should normally "blow out" right here. If you supply a vehicle, then the response would be sufficient to rate a (/).

**Fact Finding Topic: Commuting Distance**

Possible Findings:

How to Rate:

Caller lives 12 miles from your office.

✓ Rates a (✓) because the response indicates an acceptable commuting distance to work.

Caller lives twelve miles away.

- Rates (-) because our Employee Survey showed that 88% lived within 10 miles of the office. Only 9% lived between 11 and 15 miles away, and only 3% more than 15 miles away.



You may be able to overcome this weakness with the candidate, or you may not.

The "X" means that there is likely no match on this item between the candidate and the position. On rare occasions, where there are other "+" factors should you continue the hiring steps when the candidate receives an "X".

### Three Areas of Evaluation

- There are 9 question areas to be covered in the phone interview.
  - Three are part of the FACT FINDING
  - Three in the REACTION TO
  - Three in the BACKGROUND

### Ranking Candidates by Category

- **Perfect Candidate:** This score will show a result where the applicant received "+" on every question. This will be very rare. You can see the total number of points received if someone had all "+"s". Don't expect this. As we know, nobody is perfect.
- A "perfect" candidate (you should not expect these) would have received a score for a total of 45 points (X 5).
- **Good Candidate:** This score shows the results when there is a mixture of "+"s and "-"s. A Good Candidate score is an average based on what almost half of the ratings being "+"s.
- A candidate who meets all job requirements based on their responses would receive a total of 18 points.

**Minimal Candidate:** This score shows the results when a candidate has received "-"s, or a balance of "+"s", "-s", and "-s" that still is over what all "v/s" scores would have been. You should continue with the Minimal candidate score unless an "X" is part of the evaluation.

- A candidate with some "-"s might lower the score when mixed with other "v/s" and "+"s
- As a general rule of thumb, **you should not consider pursuing any candidate who receives less than 18 points.** You should also

generally not pursue a candidate who has any "X" on the evaluation scale.

### **Improve Your Future Recruiting By What You Learn**

- You can use the form to make notes about the time and date of the interview to be held (and note the appointment on the **g Interview Log Form**).
- If the candidate declines the interview, you may want to make notes about their reason. This will tell you what type of callers who are attracted to your campaigns and the reasons why. Some applicants may not find the job as a "fit."

### **Hints**

- When setting up an interview, give specific directions to get to your office. Make sure the caller knows how far it is from where they're coming and exactly how to get there. Give good landmark directions. If they have access to the Internet, have them print out a map and driving directions from a site like [MapQuest](#).
- Advise the candidate when you're setting aside a specific time to spend for the interview. If they can't make it, they need to understand the importance of you advancing notice so that you can set it aside for someone else.
- Set interview times on odd minutes such as 9:30 AM or 10:40 AM instead of 9 AM or 10:30 AM. Setting specific odd times tends to result in candidates showing up earlier rather than late.

Documents related to  
Conducting the Phone Interview

Phone Interview Screen and Evaluation Form

Hiring Interview Log Form

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