



Interview Roadmap

Your guide to identifying the right candidate faster

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Employers and recruiters are finding it increasingly more difficult to navigate the challenge of hiring high-quality candidates in this competitive candidate-driven market. We're seeing the lowest unemployment rate in years, leaving more open job positions than candidates to fill them - and we see this trend continuing in the future.

So how do you make sure your interview process will deliver the right hire? This roadmap will help you build a clear step-by-step plan for finding the right candidate faster. Navigate the process with ease - from the first conversation to the final reference check.

In this e-book, we'll discuss the 4 steps to finding the right candidate and provide the resources you need along the way:



1

**PHONE
INTERVIEW**



2

**ASSESSMENTS &
SKILLS TESTS**



3

**FACE-TO-FACE
INTERVIEW**



4

**REFERENCE
CHECK**

A blue circular icon with a white telephone handset and a speech bubble, set against a dark grey background with a vertical dashed line.

STEP 1: Phone Interview

Once you've filtered through the mountain of resumes and candidate applications, it's time to start talking to the selected pool of applicants. (*Need a little help? Utilize our email templates for each stage in the hiring process*). The first step is the phone interview. One of the most helpful and important things about the phone interview is that you can't physically see the person you're interviewing. In removing some of the external factors that may influence your opinion about the candidate, you can better drill into the qualifications and experiences of the person on the other end of the phone. Not only will the phone interview help you better qualify candidates without bias, but as an added bonus, it is much less time intensive and cheaper than in-person interviews.



Phone Interview Best Practices:

- ✓ Have the candidate's resume in front of you.
- ✓ Don't let the interview drag on for longer than an hour (the sweet spot is 45 minutes).
- ✓ Map out the interview before jumping in. Check out our phone interview schedule template on the following page for more details.
- ✓ If the conversation starts flowing - great! See where it takes you!
- ✓ If the conversation doesn't flow, facilitate it by asking questions about pivotal experiences in the candidate's life.
- ✓ Have clear scripting around next steps prepared — whether you want to continue on with that specific candidate or not.



Sample Phone Interview Outline

The phone interview is an important stage in the candidate screening process as it helps you stay immune to the infamous ‘3-minute rule’ where the interviewer forms their opinion of the applicant within the first three minutes after seeing them and uses the rest of the allotted interview time to support it. Focus on the quality of what the interviewee is saying and avoid making snap judgments.

Here’s a basic outline of how you can model your phone interviews:



Phone Interview Outline:

- ✓ 10 minutes: Candidates Introduction
 - *Use this time to learn as much as possible about the candidate. Let them utilize this time to tell you what they’d like for you to know about them, beyond just their resume.*
- ✓ 10 minutes: Your Company Introduction
 - *Use this time to talk about your company and more specifics about the role, including company culture, expectations and how they’re measured, major job functions, and more.*
- ✓ 10-15 minutes: Q&A
 - *This time is allotted for the candidate to ask any questions they may have, as well as for you to ask any last minute follow-up questions. Additionally, you’ll want to clearly relay next steps during this part of the phone screen.*



STEP 2: Assessments

Depending on the role or the organization, it is often important to have the candidate complete a skills test and/or personality assessment. The role-specific skills test can help the interviewer better analyze the candidate's talent outside of their experiences and anecdotes, in addition to providing the opportunity for the candidate to really set themselves apart from other applicants. The personality assessment can provide insight into the candidate's work style, as well as how they approach certain challenges and interpersonal situations. These assessments can shed some light onto whether or not the candidate would be a good fit on the team and in the organization.



Personality Assessments Best Practices:

- ✓ Explain the purpose of the personality assessment to the candidate - why you find it useful and how it will be used in the selection process.
- ✓ Let the candidate know you will be discussing the results of their assessment together so they can prepare.
- ✓ Provide your own assessment for a well-rounded discussion and to illustrate how to utilize the assessment. You also have the added bonus of leveling the playing field!
- ✓ Figure out which personality test best fits with your organization and company's culture. A few examples: Myers-Briggs, Type Indicator, DiSC Behavior Inventory, Caliper Profile, CliftonStrengths (formerly StrengthsFinder), 16 Personality Factor Questionnaire (16PF)

Skills Tests Best Practices:

- ✓ To ensure the fairness of the selection process, if you decide to do a skill-specific test, you want to have all candidates do it.
- ✓ Give clear guidance on when the test is due and if/when it will be discussed during the interview process.
- ✓ Explain the purpose of the test to the candidate—why you find it useful and how it will be used in the selection process.
- ✓ Keep the fine balance between providing enough information for the candidate to complete the test, but making sure the test is still a useful evaluation tool by not giving away too many details.



STEP 3: Face-to-Face Interview

The face-to-face interview is the last stage of the process that involves the applicant. While only the most qualified candidates make it to this stage, it is crucial to pay equal attention to green and red flags and reject a candidate that you may have liked up until this point if the facts speak against them. At the end of the final interview, you must be prepared to make an almost immediate decision and understand that there are only two outcomes - to hire or not to hire. Remember that it is much better to take longer to find the right employee than to hire the wrong employee quicker.



Face-to-Face Interview Best Practices:

- ✓ Bring a copy of the candidate's resume and the personality assessment and/or skills test with you to the interview.
- ✓ Allow enough time to really dive deeper into the role and the candidate. The amount of time needed will likely vary, but should be no longer than one hour per interviewer in most circumstances.
- ✓ Don't forget that the candidate is interviewing you as well! Make a good first impression by having the interview room fully set up, the office or setting tidy, and all of your materials printed out. Another nice gesture is to offer the candidate a water, tea or coffee.



Sample Face-to-Face Interview Outline

Remember that candidates (especially the best ones!) are likely looking at a few potential employers, so the selection process goes both ways. It's a tough balancing act between drilling into the qualifications of the candidate and also making them feel relaxed. So here's a basic outline of how you can model your face-to-face interviews:

1. Break the Ice

Start with small talk. Let the candidate talk about themselves for about 5 minutes and show genuine interest to facilitate a relaxed atmosphere and create rapport.

2. The First Question

To shift the conversation from small talk and begin the interview dialogue, ask the candidate about their understanding of the job.

3. Resume Review

While the candidate walks you through their resume and highlights past experiences, you are looking for insights into a few key aspects of the candidate: (1) whether they effectively get things done; (2) whether they have passion; and (3) how they make decisions.

4. Address Skills or Personality Assessments

If you've asked the candidate to take a skills test, use this time to ask them to expand upon their written responses, especially on any points that relate to the position for which they are interviewing.

If you've asked them to complete a personality assessment, use this time to walk through their results, as well as your own. Make sure to ask them if they see anything that might indicate challenges working together, or any characteristics that would help the working relationship.

5. Q&A and Next Steps

The remainder of the interview should be wrapped up with Q&A. After which, if you haven't decided against the candidate, you can ask for permission to continue on with reference checks.



STEP 4: Reference Check

If the candidate is still in play following the face-to-face interview, it's time for the last stage in the hiring process. The reference check is helpful in gathering external information and testimony about the candidate from their trusted sources. In addition, these conversations will likely elucidate whether the interviewee exhibits characteristics that would be conducive to the company's culture or a detriment. The reference check is also your final opportunity to learn as much about the candidate as possible before extending an offer - their strengths, weaknesses, work style etc. from the perspective of an external source or previous coworker.



Reference Check Best Practices:

- ✓ It's helpful to include a diverse set of references - people who have worked with the candidate directly, people who have managed or worked for the candidate, and even personal references.
- ✓ Pay particular attention to who the candidate provides as references to see if any patterns or insights emerge.
- ✓ Respect the candidate's privacy! Make sure to ask if there is anyone who you should avoid doing a reference check with - and do not reach out to that person.
- ✓ Look for red flags and green flags in conversations with references and allow them to inform your final decision.

Conclusion & Additional Resources

Finding and hiring the right candidate can be an overwhelming task. Make your life easier by putting a recruitment process in place with the right tools to navigate this tricky hiring landscape.

Check out these additional resources to help you find the right candidate:



The Art of Interviewing



Hiring Checklist



Applicant Tracking Email Templates

And make sure you have the right platform in place to simplify, streamline and optimize your company's recruitment process. An Applicant Tracking System provides administrators with powerful applicant management tools - from message dashboards and integrations with job search sites to streamlined onboarding and benefits enrollment, speed up the time to hire and improve retention rates with an ATS.

Learn more about BerniePortal's comprehensive Applicant Tracking Tool:

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