

You like them, but...



FIELD MANUAL FOR SALES

Recruit the Best™

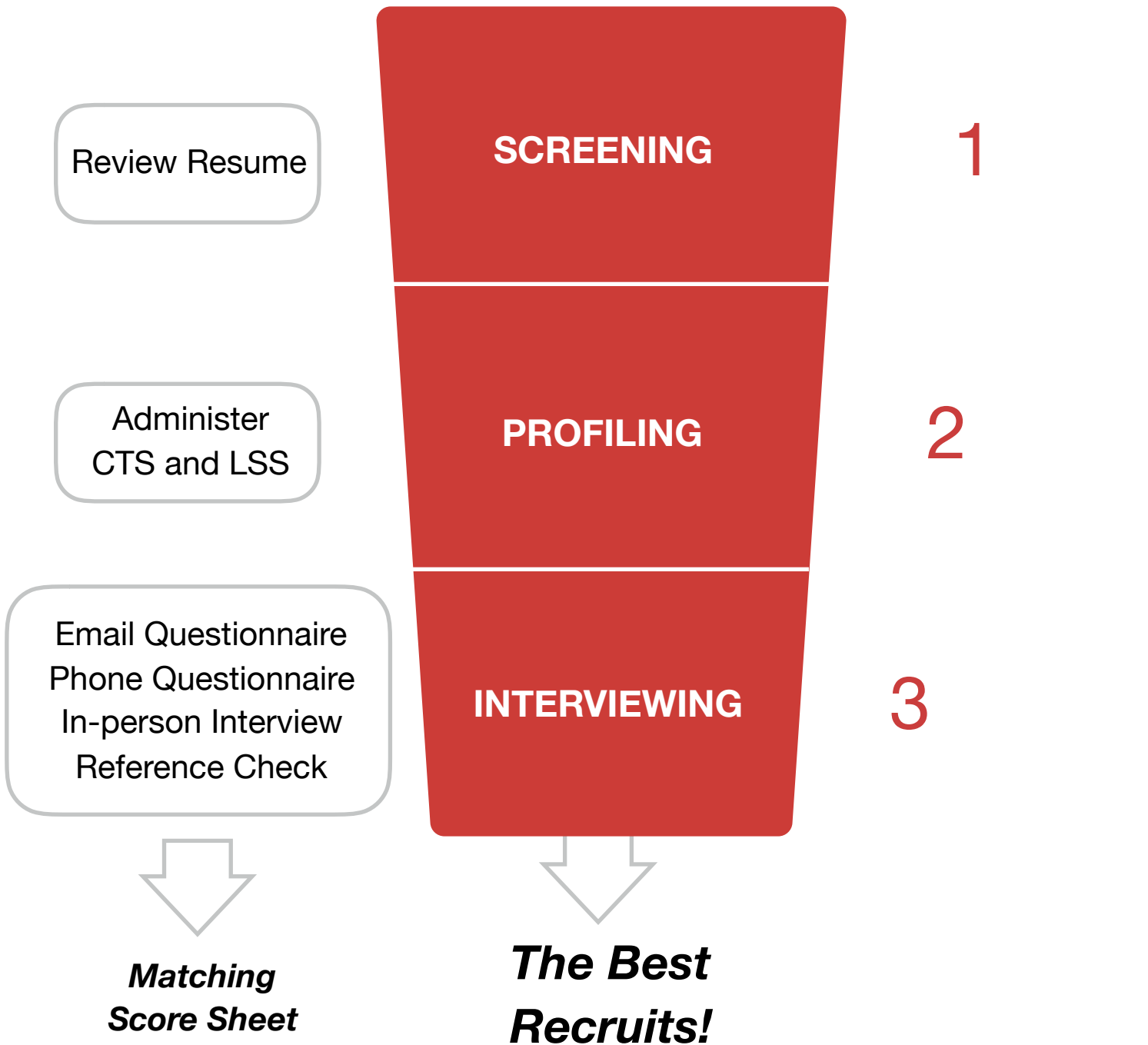
Recruit the Best System

SOURCING

Tools and Skills

Finding Candidates

Process Areas



Welcome

Thank you for purchasing the Recruit the Best Field Manual!

Use the tools and questionnaires in this manual as you follow the system outlined in the book, *Can They Sell*.

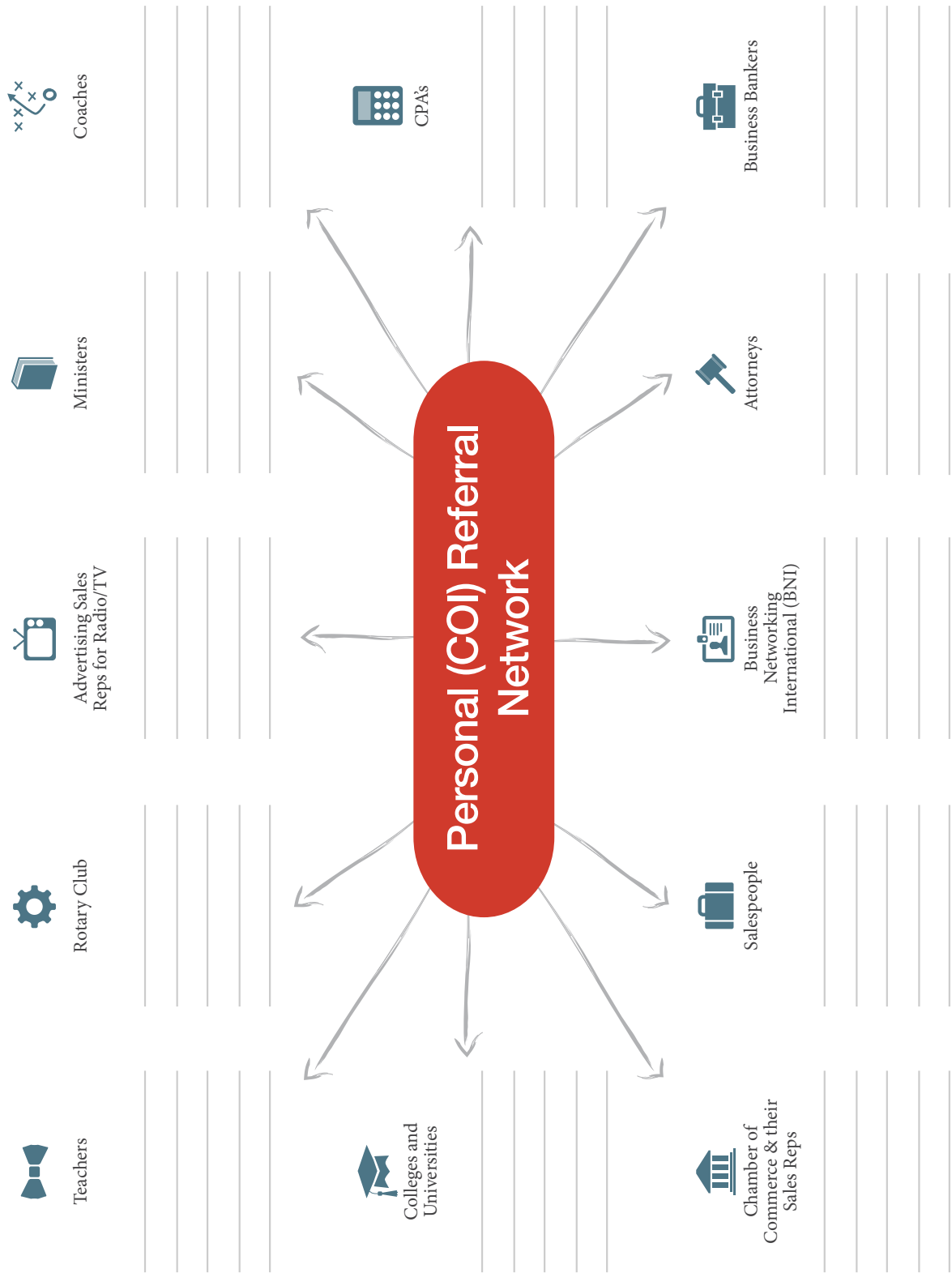
1. Follow the system as outlined on pages 23-39 in the book.
2. Master the skills of great interviewers on pages 41-47.
3. Use the Checklist (described on p. 39 in the book) to guide you through each step of the process.
4. Use the Matching/Score Sheet to score your candidates in each area of the Best Salesperson Profile (described on pp. 26-30). Keep your recruiting decisions logical and unemotional.
5. Screen by phone and in person using all the questionnaires.
6. Send an email questionnaire to measure your candidate's written communication skills.
7. Ask for references in the unique way explained on page 51 of the book, and then use the Reference Check Questionnaires.
8. Administer the CTS Sales Profile (CTS) and get accurate scores on your candidates' hard-wired personality traits (pp. 119-123). www.ctssalesprofile.com
9. Get additional input from other team members using the Team Interview Questionnaires.

Please keep in mind that all the pages in this Field Manual are protected by copyright laws. This means it is illegal to share any of these files with anyone. They are to be used only by the individual who made the original purchase. Any distribution without permission will be prosecuted.

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Personal Referral Network

Language to use when building a Center of Influence (COI)

Language for a CPA, Attorney or Business Banker

"I am expanding and growing my business. In order to do so, I must hire high quality salespeople. I have found that the best way to find quality people is to establish relationships with people in the community who have regular contact with the type of people whom I seek to hire. Based on my experience, individuals in your position regularly come across people who are looking to change careers or are looking for a better opportunity. I would like to meet you and tell you more about this great opportunity with the hope that we can mutually benefit someone looking for a career change."

Language for Religious Organizations

"I am expanding and growing my business. I am looking to hire several salespeople for this area. I have found that a great way to find quality people is to visit the churches in the area and speak to the person who deals with those individuals who are looking for jobs. Most churches either have a job seeker's ministry or a person in the church who is praying for and working with those individuals looking for jobs. May I have the opportunity to meet this person? I am confident we can help some of your members."

Language for Current Salespeople

"As you have heard by now, _____ (your company name) needs to recruit more high quality salespeople. In order for us to keep our products competitive, grow market share and continue to provide a great place to work for all current salespeople, we need to recruit more salespeople who see this as a long-term career. The better salespeople we recruit, the more all of us benefit; you, our customers and their families. We need your help. You know this career well. You know the high caliber person we are looking for, and I know if you recommend someone to this career, you will feel personally responsible if they do not make it. For these reasons, we have found the best referrals come from our existing salespeople. I would like to visit with you on a regular basis, once per month, and gain your help and support in meeting quality people you feel will be a great fit for this business. We are planning on having a recruiting seminar on _____ and would like to ask you to please bring or refer ___ candidates to the seminar."

Recruiting Referral Network Activities

Create a network of people and events that lead you to candidates to put into your recruiting funnel. These are centers of influence: community and public social gatherings, career fairs, recruiting seminars, etc. Create a combination of COI's and events totaling 25. See or attend a total of 2 per week. This will result in seeing these COI's or attending these events once per quarter or 4 times per year. Sales managers and recruiting professionals who build strong COI's tell us that this weekly focus has been shown to be the number one activity that results in the most quality candidates found for their recruiting funnel.

Personal Referral Network Worksheet

Source	Action	Date Complete
Current Customers <i>Email all customers and ask them to refer friends/family who can sell. If you don't have an email list, send a postcard to customers asking for their email address.</i>	Create email list	
	Write email	
	Send Email	
Current Team (Personnel) <i>Write short job description and have team members post on their personal Facebook and LinkedIn pages. Email job description to their contacts. Have them contact their church/temple about the job opening.</i>	Write short job description	
	Facebook	
	LinkedIn	
	Email	
	Church/Temple	
	Team Member 1	
	Team Member 2	
	Team Member 3	
	Team Member 4	
	Team Member 5	
Team Member 6		
Sales Trainers/Consultants <i>Find certified trainers at these companies in your city and meet with them.</i>	Integrity Solutions	
	Sandler	
	Dale Carnegie	
	Wilson Learning	
	Steven Covey	
	Jeff Gitomer	
Directors of Networking Groups <i>These are the most networked people in your city. Email them job posting and ask to distribute to members. Meet with them.</i>	BNI	
	e-Women	

Personal Referral Network Worksheet

Source	Action	Date Complete
Social Networking <i>Spend 15 minutes daily building your social media profiles.</i>	LinkedIn	
	Facebook	
Churches/Temples <i>Most have job boards and jobs ministries. Contact and ask for minister/volunteer who heads up this ministry. List 5 target organizations.</i>	1.	
	2.	
	3.	
	4.	
	5.	
Small Business CPA <i>Contact and ask them to direct people to you who are closing businesses or changing careers.</i>	1.	
	2.	
	3.	
Small Business Attorneys <i>Contact and ask them to direct people to you who are closing businesses or changing careers.</i>	1.	
	2.	
	3.	
Chamber of Commerce <i>Contact sales manager and salespeople. Ask them to direct people to you who are looking for jobs.</i>	Sales Manager	
	Salesperson 1	
	Salesperson 2	
	Salesperson 3	
Chamber of Commerce <i>Business Afterhours Events.</i>	Attend all of these events. Many salespeople who are changing careers attend these events.	
President – Community Service Organizations <i>These people are leaders and well connected. Meet with these.</i>	Rotary	
	Lions Club	
	Kiwanus	
	United Way	
	Boy Scouts	
	Girl Scouts	
	Jr. League	

Personal Referral Network Worksheet

Source	Action	Date Complete
Recruiters at other Companies in your Industry <i>Develop reciprocal relationship, trade resumes.</i>	1.	
	2.	
	3.	
	4.	
Universities/Colleges Career Services Dept. <i>Set up interview day. Most will market the position to students.</i>	1.	
	2.	
	3.	
	4.	
	5.	
Social Network Job Boards <i>Post job here.</i>	Salesgravy.com	
	LinkedIn	
	LinkedIn Groups	
Traditional Job Boards <i>Post job here.</i>	Monster	
	Career Builder	
	Snagajob.com	
	Findtherightjob.com	
	Newspapers	
Sales Reps	Tell receptionist to set a time to meet every sales rep that calls on your office, and recruit and/or network with them.	
Job Fairs <i>If you recruit in large numbers, this is a way to get many people interested in your position. Attend job fairs in your city, or hold your own.</i>	1.	
	2.	
	3.	
	4.	
	5.	

Sample email to send to your current customers or list of contacts:

“Please assist me in helping someone you know. I have an open position on my sales team. If you know the right candidates for the job, please help them find a great career by sending them to see me. The right candidates will have the following traits: Honesty, Hard Work Ethic, a Concern for Others and Personal Responsibility. Strong candidates will have personalities which cause them to network to find prospects, pursue goals, and handle themselves with confidence. Sales Experience _____ Please have them forward their resume to me at _____ Thank you for helping me find the right individuals and for helping them to find a great career.”*

Matching Score Sheet

Candidate Name: _____ Date: _____

Can they achieve the goals? Do they possess the competencies for the job? How do their personality traits match with what they must do? Do they have the most important attitudes and beliefs for your culture? How fast will they learn?

The Matching Score Sheet answers these questions by helping you score your candidate on all five dimensions of the *Best Salesperson Profile*. Use this tool throughout the selection process to document your assessment of the strength of each Character Trait, Attitude, Motivation, Personality Trait and Sales Skill as they are revealed to you. Using the checklist (page 13) along with the Matching Score Sheet will help you make a logical rather than an emotional recruiting decision.

	GREAT			GOOD			MARGINAL			
SCORE	10	9	8	7	6	5	4	3	2	1
Character Traits										
Honesty										
Concern for Others										
Hard Work Ethic										
Personal Responsibility										

	GREAT			GOOD			MARGINAL			
SCORE	10	9	8	7	6	5	4	3	2	1
Attitude										
Product										
Sales										

	GREAT			GOOD			MARGINAL			
SCORE	10	9	8	7	6	5	4	3	2	1
Motivation – income or competition										

Matching Score Sheet

		<i>GREAT</i>				<i>GOOD</i>			<i>MARGINAL</i>		
	SCORE	10	9	8	7	6	5	4	3	2	1
Personality Traits											
Deadline Motivation											
Recognition Drive											
Assertiveness											
Independent Spirit											
Analytical											
Compassion											
Self-Promotion											
Belief in Others											
Optimism											

		<i>GREAT</i>				<i>GOOD</i>			<i>MARGINAL</i>		
	SCORE	10	9	8	7	6	5	4	3	2	1
Sales Competencies											
Finds Prospects											
Maintains High-Activity											
Handles Rejection											
Sets Appointments											
Sell Face-to-Face											

Final Interview Score: _____ of 180 = _____%

CTS Sales Profile Score: _____

LSS Score: _____

Matching Score Sheet

As You Use the Recruiting Tools, Write in Evidence You Find For (+) or Against (-) Each

Character Traits	+	-
Honesty		
Concern for Others		
Hard Work Ethic		
Personal Responsibility		

Personality Traits	+	-
Deadline Motivation		
Recognition Drive		
Assertiveness		
Independent Spirit		
Analytical		
Compassion		
Self-Promotion		
Belief in Others		
Optimism		

Sales Competencies	+	-
Finds Prospects		
Maintains High-Activity		
Handles Rejection		
Sets Appointments		
Sells Face-to-Face		

Recruit the Best Checklist

Candidate Name: _____

Date: _____

1. **Review Resume.**
2. **Administer the CTS Sales Profile and LSS** (*Learning Style Survey*).
3. **Screen by Phone** – Use *Phone Screen Questionnaire* on pages 16-19; or **Screen by Application** - Use *Application* on pages 14-15.
4. **Screen by Email** – send “Thank you” email with these questions:
 - What do you think this job involves?*
 - What do you believe a successful team member will accomplish in the first 90 days?*
 - Tell me why I should consider you for this position?*
 - What specifically in your life do you want to change?*
 - How will being successful in this job help you with this change?*
5. **Schedule face-to-face initial interview.**
6. **Email Initial Interview Homework** - Prior to the interview, email the candidate instructing them to go to the following Web sites and review the information:
 - To learn about our products, go to: (URL to your agency web site.)
 - To learn about what a salesperson does with this company go to: (URL to your corporate web site.)
 Prior to Initial Interview, email the candidate to confirm the interview and make sure they have reviewed the Web pages.
7. **Conduct Initial Interview** – Use *Initial Interview Questionnaire* on pages 20-27.
8. **Ask for 6 References** – 2 previous supervisors, 2 coworkers, 2 business people/former customers.
9. **Call References** - Use *Reference Check Questionnaire* on pages 45-50.
11. **Interview By Current Team** – Use *Team Interview Questionnaire* on page 67.
12. **Conduct Final Interview** - Use *Final Interview Questionnaire* on pages 54-66.
13. **Invite in for an on the job visit. During this visit have them do one or more of the following:**
 - Test computer skills - Show them a computer task they will be doing and let them take the chair and do it.
 - Job shadow a team member who does the same task as them.
14. **Fill Out *Matching/Score Sheet*** on pages 10-12.

Application

Copy and paste these questions into an email to the candidate.

Describe your computer skills.

Why did you leave each job, and why are you leaving your current job?

Describe how you are going about in finding and choosing your next job.

What do you know about us and like about what we do?

What caused you to have an interest in this job?

Describe your understanding of the duties of this job.

Describe an area of your life where you have set a goal to make things better. How close are you to hitting the goal?

What is the most challenging personal behavior that might keep you from reaching this goal?

What are the three most important things in your life?

Which compensation structure do you desire: one with a lower base where you can earn more if you sell more, or one with a higher base where your over-all pay is more predictable?

How much money do you need to make? Want to make?

What is the most money you have made in a calendar year?

Do you have anything going on in your life that currently causes you to regularly come to work tired and stressed that might impact your production?

What is the most challenging job you have ever had, and why was it so challenging?

What do you think will be the greatest challenges of this job?

When I check references, what examples will your supervisors and co-workers give me in the following categories:

- Getting to work on time everyday and having consistent attendance?
- Your honesty?
- An example of your hard work ethic?
- Getting along with and helping other team members get along with each other?
- How you received their coaching and got better?
- When others on the team were down, how you built them up?
- Your ability to learn complex information quickly?
- How you built good relationships with customers?

Which previous employer should I call who will take my call and validate your above examples?

Tell me about a time in your life when something went wrong because of a decision you made.

What did you do to correct it?

What should you have done differently?

What do you like about our products or services that sets us apart from other insurance companies?

What has been your experience with purchasing insurance and financial services products?

With which company do you currently have your insurance and financial products, and what caused you to purchase with that company?

Was there another person involved in the buying decision? If so, describe your involvement in the buying process.

If you come to work for us, are you willing to move all of your insurance products to our company?

Why do you think I am asking you these questions regarding owning our products?

Describe your ranking among your peers in the last 12 months.

What is your previous and best sales accomplishment, awards, etc.

What was your closing ratio?

How many quotes did you produce each day/week?

How many sales/applications did you produce each month compared to your quota?

What is the most important skill of a salesperson?

For what skills will you need training or coaching in this position?

Describe your current/previous supervisor.

What do you think has the greatest impact on a person's success?

Describe where you see yourself in 5 years and the plan you have for getting there.

When we pull your transcript, what grades will we see for you in high school?

What was your favorite subject in high school, and what grades will we see in that subject?

What was your ACT score? *(Avg. is 21)* What was your SAT score? *(Avg. is 1059)*

What grades will we see for you in college?

What was your favorite subject in college, and what grades will we see in that subject?

What are the names of the last 2 books you have read?

What did you learn from these books?

How do you keep up with current events?

What is the current event that interests you the most?

What is 10% of \$492.50?

If you are traveling 50 miles per hour, how far do you travel in 60 minutes?

Phone or In-Person Screening Questionnaire

This is a screening only questionnaire. You are looking for strong major reasons not to hire.... i.e. looking for “just any job” with no concrete reason for wanting to work for you, not money motivated, not committed to being in sales, not committed to selling your products, not in the right stage of life, not willing to work this hard, previous on the job negative behaviors.

Frequently Asked Questions:

- Do I ask all these questions? Ask as many questions in each category needed to clearly understand that category.
- How long should this interview last? 5-40 minutes. Stop at any point if you decide not to hire the person. The goal of this interview is to test phone skills and look for clear, obvious reasons not to hire them.

Describe your computer skills and how you have used these in previous jobs.

Measuring Motivations and Passion for the job. What is their “WHY”: *(Why do they want this job, with your company? Do they have career goals and objectives, or are they wanting to test drive this career?)*

Using the resume, ask: why did you leave each job, and why are you leaving your current job?

Describe how you are going about in finding and choosing your next job. *(Are they running from something, or are they running toward a career goal?)*

What do you know about us and like about what we do? *(Have they researched your company?)*

What caused you to have an interest in this job?

Describe your understanding of the duties of this job? *(Does their answer match the job description?)*

Describe an area of your life where you have set a goal to make things better. How close are you to hitting the goal? *(Do they have a career goal? Are they tracking progress?)*

What is the most challenging personal behavior that is keeping you from reaching this goal?

What are the three most important things in your life? *(Is “Career” one of the three?)*

Which compensation structure do you desire, one with a lower base where you can earn more if you sell more, or one with a higher base where your over-all pay is more predictable? *(People who desire safety and security want a higher base and will be stressed with a pay-for-performance compensation structure.)*

How much money do you need to make? ...Want to make? What is your income goal for this year? How do you track progress toward this goal?

What is the most challenging personal habit that is keeping you from reaching your potential income goal?

What is the most money you have made in a calendar year? *(Have they ever come close to the amount they want to make?)*

Phone or In-Person Screening Questionnaire

Measuring work ethic, receptivity to coaching, honesty, positivity, concern for others:

Do you have anything going on in your life that currently causes you to regularly come to work tired and stressed that might impact your production?

What is the most challenging job you have ever had, and why was it so challenging?

What do you think will be the greatest challenges of this job?

When I check references, what will your supervisors and co-workers tell me about you in the following categories: *(The lack of specific examples usually indicates a challenge in the category.)*

- Getting to work on time everyday and having consistent attendance? Will any of them tell us that you were late to work or at times not dependable and missed many days due to personal reasons?
- Your honesty?
- An example of your hard work ethic?
- Getting along with and helping other team members get along with each other?
- An area where you needed coaching and how you used it to get better?
- When others on the team were down, how you built them up, and how well you got along with all team members?
- Your ability to learn complex information quickly?
- How you built good relationships with customers?

Which previous employer should I call who will take my call and validate what you just told me.

Tell me about a time in your life when something went wrong because of a decision you made.

What did you do to correct it?

What should you have done differently? *Do they easily admit mistakes? (Coachable) Do they struggle to think of an example? (Less coachable) Do they give an example that is not a significant mistake? (Less coachable)*

Measuring their attitudes toward your company: *(Honest salespeople sell based on their own personal testimony, which must be, "I own the products I am recommending to you, and here is why I think you should own them." If they are not willing to own your company's products, they will struggle to close sales.)*

Phone or In-Person Screening Questionnaire

Are you in a situation in your life where you can purchase your own auto policy and a renters or home owners policy? (If they are living at home and are on their parent's insurance policy, they are a high risk candidate.)

What do you like about our products or services that sets us apart from other insurance companies that caused you to apply to us rather than one of our competitors?

What has been your experience with purchasing insurance and financial services products?

With which company do you currently have your insurance and financial products, and what caused you to purchase with that company? *(If still living with parents and on parents' policy, high risk candidate.)*

Describe the features of your current auto and homeowners/renters policy.

Was there another person involved in the buying decision? If so, describe your involvement in the buying process. *(If this was a joint decision, did they play a major role in the decision, or did they simply go along with the decision of the other person?)*

If you come to work for us, are you willing to move all of your insurance products to our company? *(If you are inclined to hire this person, it may be beneficial to conduct an Insurance and Financial Review with all decision makers present.)*

Why do you think I am asking you these questions regarding owning our products? *(It is dishonest to recommend a product to someone else that you are not willing to own yourself.)*

Measuring sales experience results: *(If they have sales experience, ask these questions.)*

Describe your ranking among your peers in the last 12 months.

What are your best sales accomplishments, awards, etc.?

Describe your sales metrics in these areas. *(Describe the Target and your Results):*

- Closing ratio: Target ___ Result ___
- Personal monthly income goal: Target ___ Result ___
- Number of sales each month needed to reach your income goal: Target ___ Result ___
- Number of daily/weekly quotes needed to reach your sales target: Target ___ Result ___
- Number of daily phone calls needed to reach your quote target: Target ___ Result ___

What tool did you use to track these metrics? Could you supply me with a copy of the results? *(If these results are not in writing, they are based on a feeling and not on facts.)*

Where did you find your leads?

What is the most important skill of a salesperson? *(Listening and diagnosing needs.)*

For what skills will you need training or coaching in this position?

Measuring Skepticism/Trust of Others: *(Will they trust you as their coach?)*

If Belief in Others on the CTS is <20, ask this question:

Describe your current/previous supervisor. *(Do they appear to be overly critical of other people?)*

Measuring Optimism: *(Do they have a positive outlook on the future?)*

If Optimism on the CTS is <40, ask these questions:

Phone or In-Person Screening Questionnaire

What do you think has the greatest impact on a person's success? (Optimistic People believe that their own hard work, efforts and decisions will have the greatest positive impact. Pessimistic people believe that success is more about luck rather than their efforts.)

Describe where you see yourself in 5 years and the plan you have for getting there. (Optimistic people have concrete plans and goals. Pessimistic people talk in vague, general terms about goals. They have a reactive approach to life vs. a proactive approach.)

Measuring Intelligence:

If the scores on the LSS are >60 seconds for "Time" or <25/35 for "Accuracy" ask the following:

What is the most complex task you have had to learn for a past/previous job? (Have they ever had a job as complex as this one?)

What was your ACT score? (Avg. is 21) What was your SAT score? (Avg. is 1059)

When we pull your transcript, what grades will we see for you in high school?

What was your favorite subject in high school, and what grades will we see in that subject?

What grades will we see for you in college?

What was your favorite subject in college, and what grades will we see in that subject?

What are the names of the last 2 books you have read? (Intelligent people read or listen to books that help them be more productive.)

What did you learn from these books?

How do you keep up with current events? (Intelligent people keep up with things that impact their life.)

Tell me something about the current event that interests you the most?

What is 10% of \$492.50? (\$49.25)

If you are traveling 50 miles per hour, how far do you travel in 60 minutes? (50 miles)

Background

1. To what extent have you ever been convicted? (Felony, misdemeanor, etc.)
2. If I were to pull a credit report what would I find? (Bankruptcy, etc.)

After a successful screening interview....

- (1) Screen by email (see page 13, step 4)
- (2) Schedule the Initial Interview
- (3) Email the Initial Interview homework (see page 13, step 6)
- (4) Conduct in-person interview using the "Initial Interview Questionnaire". (see pages 20-27)

Initial Interview Questionnaire

Important!!!! Only use this questionnaire after you have asked all the questions on the “Phone or In-person Screening Questionnaire”.

Purpose of the Interview: Use the initial and final interviews as screens for the character, attitudes, motivations, personality and skills necessary for performing well in a high-activity sales position and for a cultural fit in your company. Remember, multiple interviews and interviewees increases the ability (predictability) to make better selections.

How to Conduct the Interview:

1. In the beginning, relax and gain rapport.
2. When you are ready to proceed, make a simple statement like “Let’s begin the interview now” to make the transition.
3. During the interview, do not make apologies or attempt to rescue when the candidate is struggling.
4. Ask each question as written, and then listen. Do not lead the candidate by rephrasing the question or elaborating on the question in a manner that helps them understand the answer you want. Usually, their first answer gives you the most insight.
5. Let them know in advance that you will interrupt their answer and move to another question when you have heard enough to save time in the interview.
6. Stop the interview at any point when you decide “Do Not Hire”!
7. At the end of the interview, do not rescue. The interviewing person may have had an emotional experience. If you feel that you need to ask if the person interviewed has any questions, keep discussion to pertinent issues. Do not get drawn into a discussion of the result of the interview.
8. Stay on track. This is especially important in your first few interviews.
9. Remember, if you do not understand the answer to each question, ask a secondary (or layered) question to verify the answer.

Example: *“Could you give me an example of that?” “Help me with a little more information on that.” “Why?” “Could you be more specific?” “Anything else you would like to add?” “How do you feel about that?”*

First responses are going to be as safe as possible. Many answers are the candidate’s philosophy regarding the subject of the question, so you will have to ask for specific examples. Secondary questions push the person toward the edge of their paradigm. A third question, if applicable, really moves the person into a deeper more meaningful answer.

In any interview, it’s easy to get answers that appear to be true. You need to be sure that you are clear on: **(1)** the words used, **(2)** their definition of the words, and **(3)** their emotional feelings/ motive(s) behind the words. Take your time and be as present in the interview as you possibly can. Listen to what the candidate feels as well as to what they say. If you are not totally clear on any answer, ask more questions.

Initial Interview Questionnaire

******** *If at any point during the interview, if the candidate is talking too much, use this technique to determine if you can coach them to not over communicate/talk too much.* ********

“I would like to pause the interview here for just a minute and make you aware of a concern. You appear to have a high need to be understood. This causes you to over-communicate. The concern that I have is a time management concern, which will cause your conversations to last too long, and by the end of the day, you have not made enough calls and quotes. So.... for the rest of the interview, I would like to challenge you to shorten your answers.” Continue with the interview. *(You are measuring two things with this technique. (1) Can they shorten their answers for the rest of the interview? If so, this is an indication of their ability to discipline themselves to stop talking too much. If they cannot stop talking too much, they are a very high risk candidate. (2) What is their reaction to this attempt to coach them? Do they choose to be offended? Do they get upset and defensive? Do they get so rattled, that they struggle to continue with the next few questions? All of these reactions are indications of receptivity to coaching.)*

Build Rapport - Look for Things Important to the Candidate

Before we begin the interview today, what questions do you have for me? I will answer these questions after the interview today. *(These question will give you a clear understanding of where the candidate’s thinking is regarding this job. It also saves you time, since you will only have to give them information about the job related to the questions they have.)*

Tell me about yourself. *(This is an ice-breaker question. Do not elaborate on this question!!! Look for focus on others, work desires, achievements, goals, motivations... Do not ask specific questions about the things you hear at this point. It is important not to allow the answer to this question to drag on too long.)*

Company Knowledge

While researching the company in the homework assignment, what did you learn about our company and my agency that stands out the most? *(Looking for – Did they complete the homework by going to the Web sites? Can they describe your products? Can they describe the job as a salesperson? If they did not do the homework, do not proceed with the interview. They are not serious about this job.)*

Initial Interview Questionnaire

Character Traits - (a measure of emotional maturity)

1. **Who or what has most influenced you and helped to shape your character?** *(This could be a person, an organized sport, or some other set of circumstances in their life.)*
2. **What are some of the most important life lessons that _____ taught you? What will we see in your work performance that will reflect these lessons?** *(Strong candidates will have one or more significant stories about a huge impact a team, religion, parent, teacher, coach, etc. had on the development of a specific character trait, and they will be able to explain the impact.)*

The next set of questions will help you discern important information related to these character traits and their level of emotional maturity: **Honesty, Hard Work Ethic, Personal Responsibility, and Concern for Others.** Questions that pertain to one of these traits will be dispersed in a random order to keep the candidate from getting a “feel” for which character trait is being explored. To get a truthful or revealing response, a series of questions will often start with an anchor question, and then ask the follow-up questions shown.

Definitions

Honesty *(They are willing to live with the consequences of the truth in all areas of their life.)*

Hard Work Ethic *(They understand how to set a goal, create a plan to hit the goal, then work hard to stay on task to meet the deadlines of the goal; know how to work smart.)*

Personal Responsibility *(They are receptive to coaching. They believe “if it is to be, it is up to me.” They go beyond the job description, desire coaching and mentoring, and will not blame others or circumstances for personal failures.)*

Concern for Others *(They treat others the way they want to be treated. They believe “if I help enough other people get what they want, I will get what I want.”)*

Honesty: Describe an unethical sales behavior. Are there times when this type of behavior might be OK if it helps a person make a decision to buy? Why not? *(There is never a time when any unethical behavior should be used to get a sale.)*

Initial Interview Questionnaire

Hard Work Ethic: What's your definition of hard work ethic? Who or what taught you this lesson? Give me an example of how your hard work ethic has helped you achieve a career goal in your life. *(Can they give a specific example of a career goal and the impact of hard work ethic in hitting the goal?)*

Personal Responsibility (Coachable): If I were to call your previous supervisor, what would they tell me is your greatest challenge for which they had to coach you? Give me an example of how this coaching helped you improve. Who is the supervisor I could call who would talk to me and give you a good reference? *(Can they give you a legitimate challenge where their supervisor gave them coaching and an example of how they took this coaching and got better? If they struggle to come up with an example, or give a strength as an example, e.g. "I worked too hard", they will struggle to accept responsibility and will struggle with being receptive to your coaching.)*

Concern for Others: Tell me about the last time you sat down to listen to someone who needed your advice because they had a problem or a need? Why was it important for you to do that? *(Can the candidate convince you that they have the ability to understand the importance of listening to others for the purpose of understanding their needs and problems and helping them to solve the problem?)*

Honesty: Is it OK to exaggerate what a product or service does in order to sell it? Why? As long as the product or service helps the customer, what does it matter? *(Do they counter your question with a "No" and a convincing response as to why honesty matters?)*

Work Ethic: Describe a recent goal you have set. What was the goal? What were your steps for achieving the goal? What was the original deadline? When did you achieve the goal?

Work Ethic, Honesty, Concern for Others, and Personal Responsibility: What core values should all great salespeople possess? Which of these values are the top two that would cause a customer to give you a top rating on Google because of their experience with you? *(Look for words that show evidence of honesty, hard work ethic, personal responsibility, or a concern for others. Look for honesty (or doing what they promise) within the top two characteristics.)*

Initial Interview Questionnaire

Personal Responsibility (Coachable): Tell me about a time when you went beyond a job description or the “call of duty” in order to fulfill a commitment or promise? *(You are looking for a candidate who has an attitude of, “If it is to be, it is up to me”, and who will pitch in if other team members need help.)*

Concern for Others: What’s the nicest thing you’ve done for someone? *(People who have a genuine concern for others can easily give you an example of how they have been helpful.)*

Honesty: *If their Self Promotion score on the CTS is above 70, ask this question:* I am about to read you some words and phrases. I am not going to ask you to define them, but I only want to know how familiar you are with the word or phrase. On a scale of 0-5, How familiar are you with these: *(Claiming to be familiar with a word or phrase that is not real is dishonest.)*

Photon ___ **Redemption Analysis** *(not real*)* ___ **Cranium**___ **Prespect** *(not real*)* ___
Pristine___

*(*If they give a rating above 0 on the “not real” words, ask, “Could you please use this word in a sentence?”)*

Personal Responsibility (Coachable): Tell me about a time in your life when you were given an important task to do and you did not meet the expectations of the person who gave you the task. What went wrong? What should you have done differently? *(Do they describe a story and take the blame for what went wrong, or do they blame others and circumstances. If they say, “Nothing comes to mind”, challenge them by saying, “Please help me understand. Are you saying that given your whole life, you can’t think of a time when you disappointed someone? How do they react to this challenge: offended, upset, or humbled?)*

Concern for Others: What is one thing you enjoy doing for other people? *(People who enjoy doing things for others can easily give you examples of when and how they have done this.)*

Personal Responsibility (Coachable): When things go wrong in your life, describe the thought process and steps you use to help you get back on track. Give me an example of how you used this process and steps to get to a higher level of success. Was there another person involved in mentoring you through this process? *(Emotionally mature people learn from their mistakes and understand the steps necessary to recover from a setback. Accepting personal responsibility for the bad choices they made is the first step in the thought process. Asking for advice from a mentor is also an important step toward bouncing back and shows receptivity to coaching.)*

Rate their Character 1-10: Honesty _____ **Hard Work Ethic** _____ **Accepts Responsibility**
(Coachable) _____ **Concern for Others** _____

Initial Interview Questionnaire

Attitude Toward Your Product and Salespeople - Are they willing to own the products they will be selling, and can they sell?

1. **What do you like about insurance sales and the way we go about finding new customers?** *(Does their answer indicate that they have given some thought to their likes and dislikes about this type of sales job and the way they must find customers and contact them? Look for words that show a personal interest in and attraction to your products and your company.)*

2. **What are some things that bother you about the insurance and financial services industry?** *(Do they speak negatively about your industry in a way that shows they have a negative attitude toward the job for which they are applying? Many applicants have never considered the fact that they may not like the insurance industry.)*

3. **If I were a customer, what would you tell me about our company to convince me to buy? What would you tell me as a customer about you that would convince me to buy from you?** *(Have they done enough research to know what your competitive advantages are? Can they convince you to buy from them?)*

4. **If you are making a presentation to a prospective customer regarding our auto or fire insurance what are 2-3 features and benefits that you would stress in your presentation?** *(Candidates who like your products and services and have researched your company should be able to describe one feature and benefit with at least a moderate amount of presentation strength. This is also another test for their assertiveness/self-confidence strength.)*

5. **Let's role play for a minute. Where is your favorite vacation spot? Sell me a vacation package on taking a vacation there. After they present, ask how much it costs to vacation there, then object to the price and see how they handle the objection.** *(Do they first ask you some questions about your likes and dislikes regarding the types of vacations you like to take (their understanding of needs discovery)? When presenting, do they present information about the vacation location, then tell you the benefit you will get from vacationing there (their understanding of presenting benefits, not just presenting features. Do they ask you to buy).? Rate their sales skills:*
Needs discovery ___ Presentation skills___ Closing the sale ___ Handling objections ___

Initial Interview Questionnaire

6. **Please describe what a typical day would look like if you come to work for us? Which of these tasks would stress you the most, and which tasks would you have the least amount of stress doing?** *(Strong candidates can describe spending the day executing the sales process.... finding customers, making presentations, closing sales, getting referrals. If they are too stressed by any of the previous duties, they are a high risk candidate for sales.)*

7. **What did you like about your last (sales) job? If they do not have any sales experience, ask, “Why should I consider you for a sales job if you do not have any sales experience?”** *(Looking for words like: selling, closing sales, helping other people, commission, variety of job duties, never a boring day... If they do not have any sales experience, can they convince you they can sell?)*

8. **What did you not like about your last (sales) job?** *(Looking for words like: pay not in proportion to my talent, boring job duties, no opportunity for advancement, culture against my values...Red Flag words – didn’t like calling, didn’t like convincing others to buy, manager pushed us too hard to hit numbers...)*

9. **Why do you want to be a salesperson?** *(Are they seriously pursuing sales, or are they not qualified for any other job?)*

10. **This is one of the most challenging sales positions in America. A search on Amazon for “sales books” gives over 100,000 hits. What is the name of the latest sales book you have read? What steps have you taken to prepare for this position?** *(Have they taken any steps toward learning to sell i.e. reading sales books, watching sales videos, taking sales training?)*

11. **If you were in my position where I am about to invest several thousand dollars in your salary and training, would you risk several thousand dollars on you or would you keep looking at other candidates? ... Why or why not?** *(Can they give you a compelling argument as to why you should make the investment?)*

12. **Why do you think I am asking you these questions?** *(Do they make the connection between these questions and the things they will be doing in a sales role with your company?)*

Initial Interview Questionnaire

13. How do think this interview is going? *(Can they speak with confidence that they think it is going well and they will get the job?)*

Rate their Attitudes toward your industry 1-10 _____

Rate their ability to sell or be taught to sell 1-10 _____

Candidate's Motivation – Money, Competition, or Recognition

1. **What are some current and long-term needs that will be satisfied if you do this job well?** *(Looking for specific things – provide for others, long-term career, pay off debt, save for retirement/ college education, advance career, clear description of goals...)*
2. **Please remind me, I think I have asked this question in an earlier interview. What is the minimum amount of money you need to earn if you come to work with us? What happens if you do not make this? What if you make 1-2 thousand less – what difference would it make?** *(Do they give you the same answer as before? How does their answer relate to the minimum amount for this position? Do they talk in terms of minimums just to pay bills (to survive), or a minimum amount above and beyond their bills to pay for a certain lifestyle: children's education? How strong and certain is their motivation tied to what they talk about?)*
3. **What amount do you desire to earn? Is it different than the previous number? Why?** *(Are they looking for an opportunity to become a large income earner? Is their motivation strong, or is their answer made up for your question? Is the dollar amount they want to earn at or near the amount they will earn if they hit your production targets for them?)*
4. **What recognition have you received in the past that you feel good about? How did you feel when you received it? What was important to you about that? Where did you put the trophy/plaque?** *(Do they get excited about the public recognition of plaques and awards? Do they display them prominently?)*
5. **Which is more important to you – Money or Recognition or Competition?**
6. **Describe an event where you competed. In what place did you finish? What was it about you that caused you to want to be in this event? Do you compete on a regular basis in other events?** *(People motivated by competition compete on a regular basis, and they place in the top performers on a regular basis.)*

What is their primary motivation: Money _____ Competition _____ Recognition _____

CTS Supplemental Questions

Personality Traits

If the traits on the CTS Sales Profile are outside the ideal ranges for a Selling Team Member, review the trait in this section and ask the appropriate amount of interview questions to determine if the candidate has enough off-setting factors to overcome the trait scores that are less than ideal.

Low Deadline Motivation: *(How fast and efficient will they work to make enough phone calls and generate enough quotes every day in order to hit a monthly application target?)*

Examples of behaviors that might possibly override less than ideal Deadline Motivation:

- *Extremely hard work ethic.* They regularly work 10-12 hours daily or 60+ hours weekly because they need more time to get things done, and this can be verified with references.
- Early success in their career. They quickly move up from starting positions to management positions.
- They progress from high school directly into college and finish in 4-5 years, then immediately go to work in a field of their college major.
- They are living independently without parental support.

If the scores for Deadline Motivation are <70 ask as many of these questions as necessary to help convince you that they have many off-setting factors that will help them over-ride their low sense of urgency.

Questions:

1. I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
2. How would he/she describe your pace of work: The steady trotter who is focused on being accurate and relational with customers, or the race-horse who is focused on being fast and efficient and struggles to slow down and take breaks?
3. When I call your references, what will they tell me about how many hours a week you work?
4. *(If they work long hours)* What will your references tell me is the reason that you work such long hours?
5. How does working these long hours put you ahead in productivity compared to other coworkers who work normal business hours? *(Does it appear that they work long hours, because they are slower and methodical in their work and need longer to hit expectations, or does it appear that they prefer work over leisure time?)*
6. Describe a recent goal you have set. What was the goal? *(Do they have serious goals?)*
7. What were your steps for achieving the goal?
8. What were some of the challenges you faced while pursuing this goal?

CTS Supplemental Questions

9. What was the original deadline for achieving the goal?
10. When did you achieve the goal? *(If they do not give a strong example of a goal with a plan and a deadline, their less than ideal Deadline Motivation will be a challenge to their success.)*
11. What is your income goal for this year?
12. How do you track progress toward this goal?
13. What is the most challenging personal habit that is keeping you from reaching your potential income goal? *(Make sure they name a personal habit, e.g. time management, not an outside force, e.g. a weak economy.)*

Questions to Ask References: (Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)

- Describe ____'s pace of work by choosing one of the following.
 - A steady plow horse who eventually gets things done, but works at a slower pace and takes longer hours to meet deadlines.
 - A steady trotter who works at an average speed, but eventually gets things completed.
 - A race horse who works at a fast and efficient pace and consistently meets deadlines and sales metrics without working extra hours.
 - None of the above - slow and unproductive.
- How well does ____ stay organized and prioritize and manage their time?
- How well does ____ set and meet deadlines?
- How much close supervision is needed to help ____ meet deadlines?
- What stresses ____ the most?
- Describe ____'s ability to multitask.
- Describe ____ work ethic. Give me an example of how their work ethic benefits their productivity.
- Describe ____ sales metrics in these areas:
 - Closing ratio
 - Monthly sales target
 - Monthly/Annual Sales results
 - Number of daily/weekly quotes completed
 - Number of daily phone calls made
- Give me an example of when ____ has easily adapted to change and new ways of doing things.

CTS Supplemental Questions

Low Recognition Drive: *(Do they have the energy for socializing with other people, or are they stressed in a job that requires them to interact with people all day? Are they driven by recognition and the desire to be at the top of the sales board?)*

If the scores for Recognition Drive are <50, ask as many of these questions as necessary to help convince you that they have many off-setting factors that will help them over-ride their less than ideal Recognition Drive scores.

Questions:

- Describe the last time you competed for an award. What did you do with the trophy/award, hang it up on wall or put it away?
- How often do you compete?
- Describe the last competition you were in and in what place you finished.
- What do you like the most about competing?
- Do you prefer to receive praise from your manager in private or public?
- In this job, you need to speak to 30-40 new people a day regarding their insurance and financial services needs. When you think about being social with that many people, do you feel excitement that you get to turn strangers into relationships, or do you feel stressed that you have to spend most of your day interacting with strangers?
- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
 - What would he/she tell me about your enthusiasm related to interacting with strangers and meeting new people?
- When you are working in a group at school, as a volunteer, or at work, which of these statements describes you the best? You can pick all that apply.
 - I enjoy the people in the group who are expressive and energetic and like to jump in with them to raise the energy of the group.
 - I prefer to sit back and watch the other people in the group, then decide who are the one or two people who are like me who I can connect with.
 - The really expressive people tend to annoy me.
- When you are not working, which of these statements describes you the best? You can pick all that apply.
 - I enjoy spending time on social media sites in order to let my friends, family, and the rest of the world know the exciting things going on in my life. *(Check their sites. Does their site match their answer?)*
 - I get energized by getting out and being social and making new friends. *(Where do you go and how often do you do this?)*
 - I enjoy going home and being by myself or with a few close individuals so that I can recharge for the social situations that I must face at work each day. *(What do you do to recharge?)*

CTS Supplemental Questions

- If I were to call your last supervisor, which of these statements will they use to describe you?
 - The life of the party.
 - Reserved and prefers to sit and watch the other people in the group interact.
 - Participates in conversations, when they are comfortable with the subject matter.

Questions to Ask References: (Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)

- How social is _____? Did they mostly keep to themselves, or did they quickly develop relationships with the team and become a more popular member of the team?
- If they have hunter sales experience, ask these questions:
 - How did they go about finding prospect to sell to?
 - How much time did they spend in these areas finding prospects, and how many leads per week did they find from these sources?
 - Networking groups; e.g. Business Networking International (BNI)
 - Chamber of commerce functions
 - Service organizations; e.g. Rotary, Kiwanis, Shriners, etc.
 - Trade shows
 - Canvassing the business community
 - Conducting Seminars
 - Describe their metrics in these areas:
 - Closing ratio
 - Monthly sales target
 - Monthly/Annual Sales results
 - Number of daily/weekly quotes completed
 - Number of daily phone calls made
- When they are working in a group, which of these statements describes them the best? You can pick all that apply.
 - They enjoy the people in the group who are expressive and energetic and like to jump in with them to raise the energy of the group.
 - They prefer to sit back and watch the other people in the group, then decide who are the one or two people who are like them who they can connect with.
 - The really expressive people tend to annoy them.

CTS Supplemental Questions

Low Assertiveness: *(What is their level of social confidence and assertiveness when challenged or when in a selling situation? Can they confidently make the presentation, handle the objections and ask for the sale, or are they timid and fear inconveniencing the prospects if they ask them to buy?)*

If the scores for Assertiveness are <50, ask as many of these questions as necessary to help convince you that they have many off-setting factors that will help them over-ride their less than ideal Assertiveness scores.

- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
- What would he/she tell me about your ability to confidently without hesitation assert yourself in making decisions and telling other people “No” when necessary?
- If I were a customer, what would you tell me about our company to convince me to buy? What would you tell me as a customer about you that would convince me to buy from you?
- If you are making a presentation to a prospective customer regarding our auto or fire insurance what are 2-3 features and benefits that you would stress in your presentation?
- Let’s role play for a minute. Where is your favorite vacation spot? Sell me a vacation package on taking a vacation there. After they present, ask how much it costs to vacation there, then object to the price and see how they handle the objection.

Describe your sales metrics in these areas:

- Closing ratio
- Personal monthly income goal
- Number of sales each month needed to reach your income goal
- Number of daily/weekly quotes needed to reach your sales target
- Number of daily phone calls needed to reach your quote target
- When you are working in a group at school, as a volunteer, or at work, which of these statements describes you the best? You can pick all that apply.
 - I enjoy the people in the group who are expressive and energetic and like to jump in with them to raise the energy of the group.
 - I prefer to sit back and watch the other people in the group, then decide who are the one or two people who are like me who I can connect with.
 - If I am asked to lead the group, I get very stressed and timid, and would prefer to pass the leadership to someone else and allow me to be a contributing team member.

CTS Supplemental Questions

- If I were to call your last supervisor, which of these statements will they use to describe you?
 - Stressed when it is necessary to speak up and tell someone the difficult truth.
 - Can easily and confidently voice your opinion and tell other people the difficult truth.
 - Participates in conversations, when you are comfortable with the subject matter.
- When you get rejected, or you disappoint someone, describe what you do to get your confidence back.

Questions to Ask References: (Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)

- Describe ____'s ability to confidently make decisions without close supervision.
- If they have hunter sales experience, ask these questions:
 - Did you give ____ sales training with word tracks? How well did they stick to the script and use these word tracks to be successful without really close supervision.
 - How much coaching did you have to give them regarding rebounding from rejection?
 - Describe their metrics in these areas:
 - Closing ratio
 - Monthly sales target
 - Monthly/Annual Sales results
 - Number of daily/weekly quotes completed
 - Number of daily phone calls made
- When they are working in a group, which of these statements describes them the best? You can pick all that apply.
 - They enjoy the people in the group who are expressive and energetic and like to jump in with them to raise the energy of the group.
 - They prefer to sit back and watch the other people in the group, then decide who are the one or two people who are like them who they can connect with.
 - If asked to lead the group, they get very stressed and timid, and would prefer to pass the leadership to someone else and allow them to be a contributing team member.

CTS Supplemental Questions

Low Independent Spirit: *(Will they be stressed by a pay for performance pay structure? Will they need to be micro-managed to the next task and to meet deadlines? Will they take control of the sales process and move it forward? Can they adapt to change? Can they prioritize tasks and self manage their time?)*

If the scores for Independent Spirit are <50, ask as many of these questions as necessary to help convince you that they have many off-setting factors that will help them over-ride their need to be micro managed, stress with pay for performance compensation, and struggle with controlling the sales conversation and moving it forward.

- Give me an example of when you started something entrepreneurial from scratch.
- What was your level of success with this endeavor? *(Candidates with High Independent Spirit will have examples of where they have, as a child or adult, started things from scratch in order to earn money.)*
- Describe a calculated risk you have taken to achieve a goal. What was the risk and what was the result of your efforts?
- When you are working in a group at school, as a volunteer, or at work, which of these statements best describes you?
 - You are more agreeable and cooperative and want someone else to step up and lead the group and make most of the decisions for the group.
 - You are more of a team-player who will lead some, but you want to share the leadership and gain mutual agreement on decisions.
 - You confidently step in and take control as the primary leader of the group and steer the group toward your desires.
 - You find it a challenge to patiently cooperate with the other members of the team who are slow to make decisions, and wish that you could just quickly do the task by yourself.
- If I were to call your last supervisor, which of these statements will they use to describe you?
 - A) When you are learning something new, or working on a complex task, you are more productive and less stressed when you have a supervisor close by who helps support and direct you.
 - B) You prefer to have someone give you instructions and then leave you alone to complete the task independently where you look things up on your own.
 - Who is good reference I could call to verify this information?
- What type of compensation structure do you desire, one with a lower base where you are paid for your results, or one with a higher base where your compensation may be lower but more predictable? *(The best answer is to get paid more with a lower base. People who desire safety and security want a higher base and will be stressed with a pay-for-performance compensation structure.)*
- Which job/s in your career was pay for performance? *(Have they ever worked for base plus commission? How well did they perform?)*

CTS Supplemental Questions

- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
- What example would they give me about your ability to work independently without close supervision?

Questions to Ask References: (Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)

- Describe the level at which _____ can work independently without close supervision.
- How well does ____ meet deadlines?
- How much close supervision is needed to help ____ meet deadlines?
- How well does ____ adapt to change and new ways of doing things?
- How organized is _____?
- How well does _____ prioritize and manage their time?
- Describe their metrics in these areas:
 - Closing ratio
 - Monthly sales target
 - Monthly/Annual Sales results
 - Number of daily/weekly quotes completed
 - Number of daily phone calls made

High Analytical: *(Will they get paralyzed by analysis? Will they manage their time effectively by not over preparing quotes and giving too much information in the presentation? Do they talk too much?)*

If the scores for Analytical are >60, ask as many of these questions as necessary to help convince you that they have many off-setting factors that will help them over-ride the risk of paralysis-by-analysis.

- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
 - What will they tell me about your strengths/challenges related to spending too much time focused on details?
 - Describe a coaching session that you might have had with your manager regarding time management?

CTS Supplemental Questions

- Which of these statements will your supervisor use to describe you?
 - Stressed with time management due to spending too much time preparing proposals and communicating too much information during the sales presentation.
 - Understands the balance between spending too much time preparing and presenting the quote.
 - Adequately handles details with only a moderate amount of coaching needed to help manage time effectively.
- Describe your sales metrics in these areas:
 - Closing ratio
 - Personal monthly income goal
 - Number of sales each month needed to reach your income goal
 - Number of daily/weekly quotes needed to reach your sales target
 - Number of daily phone calls needed to reach your quote target.
- Describe a recent goal you have set.
- What was the goal?
- What were your steps for achieving the goal?
- What was the greatest challenge while pursuing this goal?
- What was the original deadline?
- When did you achieve the goal?
- What is your income goal for this year?
- How do you track progress toward this goal?
- What is the most challenging personal habit that is keeping you from reaching your potential income goal.

Questions to Ask References: (Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)

- How well does _____ manage their time in a way that they hit their sales target?
- Describe their metrics in these areas:
 - Closing ratio
 - Monthly sales target
 - Monthly/Annual Sales results
 - Number of daily/weekly quotes completed
 - Number of daily phone calls made
- How often do you have to coach _____ regarding getting paralyzed by analysis or spending too much time preparing the quote?
- How much coaching was required in this area?
- How receptive to coaching were they?

CTS Supplemental Questions

Low Compassion: *(Since candidates with low compassion are more task oriented than relationship oriented, have they learned to push themselves to be more focused on the needs of others?)*

(If their Compassion score is <30 ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors to overcome their Low Compassion scores.)

Interview questions to ask to make sure they will maximize the benefits of their Low Compassion scores.

- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
- What will they tell me about your strengths/challenges related to relationships with other team members?
- What would they tell me about any coaching you needed regarding your time management?
- Demonstrate how you handle a customer who is talking too much about unrelated topics and you pleasantly move the conversation along in order to get to another customer.
- Which of these statements will your references use to describe you?
 1. At work, you are more warm, expressive, and have a genuine interest in people and will drop what you are doing to help a friend in need.
 2. At work, you are controlled in your emotions, focusing more on the task, and time management focused.
- Who is your best friend? If I asked your best friend to describe you, what words would they use? *(High Compassion scorers will use words like warm, sensitive, compassionate, good listener, caring. Low scorers will use words like hard worker, likes things - “toys”, organized, efficient.)*
- What is the nicest thing you have done for someone recently?

Questions to Ask References: *(Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)*

- How well does _____ get along with others?
- How often do you have to coach _____ regarding listening skills?
- When selling, describe _____’s ability to listen effectively regarding the needs of the customer, then tailor their presentation to the customer’s specific needs. How much coaching was required in this area?

CTS Supplemental Questions

- How often do you have to coach _____ regarding showing more compassion to other team members and to customers?
- Has _____ ever had any customer complaints against them?
- How receptive to coaching were they?
- Describe their metrics in these areas:
 - Closing ratio
 - Monthly sales target
 - Monthly/Annual Sales results
 - Number of daily/weekly quotes completed
 - Number of daily phone calls made

High Compassion: *(Will they manage their time effectively by not spending too much time nurturing people who will never buy? Do they talk too much? Are they too sensitive to criticism and rejection?)*

(If their Compassion score is >70, ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors to overcome their High Compassion scores.)

Interview questions to ask to make sure they will maximize the benefits of their High Compassion scores.

- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
 - Tell me about a coaching session you might have had regarding your strengths/challenges related to controlling the length of your conversations with customers?
 - Tell me about a coaching session you might have had regarding how you quickly rebound from rejection and criticism?
- Demonstrate how you handle a customer who is talking too much about unrelated topics and you pleasantly move the conversation along in order to get to another customer.
Rate the candidate's performance with this question: 1 2 3 4 5
- Which of these statements will your references use to describe you?
 1. At work, you are more warm, expressive, and have a genuine interest in people and will drop what you are doing to help a friend in need. *(Indicates a time management challenge.)*
 2. At work, you are controlled in your emotions, focusing more on the task, and time management focused. *(Indicates they have possibly overcome their tendency to talk too much.)*

CTS Supplemental Questions

- Who is your best friend? If I asked your best friend to describe you, what words would they use? (*High Compassion scorers will use words like warm, sensitive, compassionate, good listener, caring. Individuals who have overcome time management challenges will use words like hard worker, organized, efficient.*)

Questions to Ask References: (Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)

- How well does _____ manage their time in a way that they hit their sales targets?
- Describe their metrics in these areas:
 - *Closing ratio*
 - *Monthly sales target*
 - *Monthly/Annual Sales results*
 - *Number of daily/weekly quotes completed*
 - *Number of daily phone calls made*
- How often do you have to coach _____ regarding getting bogged down in long conversations with people and/or rebounding from rejection?
- How receptive to coaching were they?

Low Self Promotion: (*Are they sensitive to rejection and criticism?*)

(If their Self Promotion score is <10, ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors to overcome their sensitivity to rejection.)

Interview questions to ask to make sure they will avoid their low Self Promotion scores.

- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
 - What would they tell me about any coaching you needed regarding meeting your sales goals or sales activity targets?
 - What would they tell me about any coaching you needed regarding quickly rebounding from rejection and criticism?
- Describe a coaching session that you might have had with your manager regarding a challenge with quickly rebounding from rejection and criticism.
- Describe your thought process that you use to get your confidence back when you lose a sale or when a prospect tells you they are not interested.

CTS Supplemental Questions

- Who is your best friend? If I asked your best friend to describe how you deal with disappointment and criticism, what would they tell me? *(You are looking for words like... rebounds quickly or doesn't let things bother them.)*

Questions to Ask References: *(Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)*

- How well does _____ rebound from rejection in a way that they hit their sales targets?
- Did you have any challenges with _____ participating in office drama or causing drama?
- Would you describe _____ as too sensitive and a challenge to manage due to his/her sensitive nature, or would you describe _____ as an emotionally controlled person who could easily deal with rejection, criticism, and coaching?
- How often do you have to coach _____ regarding rebounding from rejection and criticism?
- How receptive to coaching were they?
- *Describe their metrics in these areas:*
 - *Closing ratio*
 - *Monthly sales target*
 - *Monthly/Annual Sales results*
 - *Number of daily/weekly quotes completed*
 - *Number of daily phone calls made*

High Self Promotion: *(Are they open and honest about their faults and failures? Can you trust what they say? Do they work too hard to tell you what they think you want to hear? Will they be receptive to coaching?)*

(If their Self Promotion score is >80, ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors to be honest and receptive to coaching.)

Interview questions to ask to make sure they will be transparent in conversations and be receptive to coaching.

- Tell me about a time in your life when you made a mistake that caused a challenging problem. What did you do to make the situation better? What do you wish you had done differently? *(Candidates who struggle to be coached will struggle to admit a mistake.)*
- What is one area of your life where you are working hard to improve a personal habit?

CTS Supplemental Questions

- Describe an area in any job where you were required to adhere to strict policy and procedure guidelines. Describe any coaching you received due to a failure to follow procedures.
- Describe a situation in which some aspect for a work project or task that you were working on was overlooked. What were the causes of the omission? How did you respond to this situation?
- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
 - How often did you have coaching sessions with your supervisor?
 - Describe two areas of performance for which you received coaching. *(Make sure their answer is coaching on job performance and not product or sales training.)*
 - What would they tell me about your receptivity to coaching?
 - What would your last supervisor tell me are your strengths?
 - What would your last supervisor tell me are your areas for improvement? *(Candidates who struggle to be coached will struggle to admit a weakness for which they received coaching.)*

Questions to Ask References: (Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)

- What are all the areas where _____ needed the most coaching?
- How coachable is _____?
- Can you trust everything _____ tells you?
- When _____ makes a mistake that requires coaching, what is their overall reaction and what results do you obtain from the coaching?
- Why did _____ leave this job with you?
- Would you hire them back?
- *Describe their metrics in these areas:*
 - *Closing ratio*
 - *Monthly sales target*
 - *Monthly/Annual Sales results*
 - *Number of daily/weekly quotes completed*
 - *Number of daily phone calls made*

CTS Supplemental Questions

Low Belief in Others: *(Are they argumentative? Are they receptive to coaching? Will they give up too easily on the sale?)*

(If their Belief in Others score is <20, ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors to overcome their low trust of people.)

Interview questions to ask to make sure they will avoid their low Belief in Others scores.

- Describe your most recent supervisor.
- Describe the person at your most recent job with whom it is the hardest to get along. *(Do they balance their answer with good and bad points, or does it appear that they have nothing good to say about anyone?)*
- Think about a time when you began a new job with a new team. How did you transition into working with this new group? How long did it take to become effective with the new group?
- Describe a time when a customer was not satisfied with a product or service and became very mad and irate. How did you respond to the customer and how did you resolve the situation?
- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
 - What would they tell me about you and any coaching they have given you related to your ability to get along with all members of the team?
 - What would they tell me about how you receive coaching?
 - What would they tell me about any coaching you have received regarding your interaction with customers or prospective buyers?
- Give me an example of a time when you had a conflict with another team member and how you resolved the conflict. *(Do they take personal responsibility for their part in the conflict, or do they blame the entire situation on the other person?)*

Questions to Ask References: *(Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)*

How long did it take for you/others to feel that _____ trusted you/others?

When _____ disagrees with something you say, does he/she...

_____ become argumentative?

_____ diplomatically discuss his/her disagreements?

CTS Supplemental Questions

When selling, does _____ respond to objections with a
 ____ diplomatic tone that causes the prospect/customer to feel respected?
 ____ argumentative tone that causes the prospect to continue to argue and object?

High Belief in Others (scores >80): *(Are they unrealistically trusting of others? Do they allow other team members to take advantage of them? Can they properly discern real prospects from less serious prospects?)*

(If their Belief in Others score is >80, ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors to overcome their high High Belief in Others.)

- Describe your most recent supervisor. *(Do they balance their answer with good and bad points, or does it appear that they only see the good traits and ignore challenging traits in their supervisors?)*
- Describe the person at your most recent job with whom it is the hardest to get along. *(Do they balance their answer with good and bad points, or does it appear that they only see the good traits and ignore challenging traits?)*
- Describe a time in your life when someone took advantage of your generosity? How often do things like this occur to you? *(Do they reluctantly admit that it happens more often than they would like?)*
- Think about a time when you began a new job with a new team. How did you transition into working with this new group? How long did it take to become effective with the new group? *(Do they mention any challenges, or do they paint an unrealistic picture of “everyone” was “so nice” and “easy to get along with”. Or, do they balance their answer with mentioning some challenging situations with one or more team members?)*
- Describe a time when a customer was not satisfied with a product or service and became very mad and irate. How did you respond to the customer and how did you resolve the situation?
- I like to check references. If you were to ask your current/previous supervisor to take my call and answer my questions, would he/she agree to do it?
 - What would they tell me about you and any coaching they have given you related to your ability to deal with challenging team members and irate customers?
 - What would they tell me about how you receive coaching and quickly implement changes?
 - What would they tell me about any coaching you have received regarding being too trusting of the intentions of others?

CTS Supplemental Questions

- Give me an example of a time when you had a conflict with another team member and how you resolved the conflict. *(Do they take personal responsibility for their part in the conflict, or do they blame the entire situation on the other person? Does it appear that they let the other person take advantage of them?)*
- Please demonstrate how you handle the price objection. When a prospect says, “You are too expensive.” What do you say to get the sale?

Questions to Ask References: *(Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)*

How long did it take for you/others to feel that _____ trusted you/others?

Did you ever have to coach _____ for being too trusting of others or being too naive?

When _____ disagrees with something you say, does he/she...

_____ express their disagreement?

_____ accept what you say, but then not act on coaching recommendations?

When selling, does _____ respond to objections with

- an effective sales language that overcomes the objections resulting in favorable closing ratios.
- a low effort to respond to objections and gives up too easily interpreting the customer’s objections and concerns as criticisms rather than unsolved questions.

Low Optimism: *(Do they have low self esteem? Will they be negative on the team? Will they give up easily when selling? Will they be receptive to coaching?)*

(If their Optimism score is <20, ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors to overcome their sensitivity to rejection.)

Interview questions to ask to make sure they will be transparent in conversations and be receptive to coaching.

- Who has encouraged you the most, helped you feel good about yourself, and helped you believe you can accomplish anything you set your mind to? *(People with low Optimism (low self-esteem) will most likely not name a parent. They will most likely talk about a teacher, coach, grandparent, etc. who influenced them later in life. People with high Optimism (high self-esteem) will most likely name one or both parents who have been a life long influence on them.)*

CTS Supplemental Questions

- Do you believe that most people control their own destiny, or do you believe that most people's lives are controlled by random incidents or events? *(Optimistic people believe they control their own destiny.)*
- Do you believe that nearly all the bad things that happen to people result in something positive, or that bad things happen to good people and when they do, the result is seldom, if ever, positive? *(Optimistic people believe that nearly all bad things result in something positive.)*
- Do you believe nearly anyone can succeed in life, even under the most difficult circumstances, or do you believe that it is difficult for most people to succeed in life if they don't get the right breaks? *(Optimistic people believe that nearly anyone can succeed in life, no matter what their circumstances may be.)*
- What do you think has the greatest impact on a person's success? *(Optimistic People believe that their own hard work, efforts and decisions will have the greatest positive impact. Pessimistic people believe in lucky breaks and that success is in the stars.)*
- Describe where you see yourself in 5 years and the plan you have for getting there. *(Optimistic people have concrete plans and goals. Pessimistic people talk in vague, general terms about goals. They appear to be floating through life with no direction.)*

Questions to Ask References: (Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)

- How positive is _____?
- What coaching was necessary to help _____ be a positive influence on the team?
- How receptive to coaching were they?
- Why did _____ leave this job with you?
- Would you hire them back?
- Describe their metrics in these areas:
 - *Closing ratio*
 - *Monthly sales target*
 - *Monthly/Annual Sales results*
 - *Number of daily/weekly quotes completed*
 - *Number of daily phone calls made*

CTS Supplemental Questions

High Optimism (scores >80): *(Are they unrealistically optimistic? Do they over-commit to others and to outside activities? Can they properly discern real prospects from less serious prospects?)*

(If their Optimism score is >80, ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors to overcome their high Optimism. Do they struggle to say “no” and over commit?)

- Describe the community activities in which you are currently involved. *(Does it appear that they are overly involved in too many commitments that might cause them to struggle to meet sales goals?)*
- Do you have anything going on in your life right now that causes you to come to work tired and stressed that might impact your production? *(Does it appear that they struggle with making decisions regarding over-committing?)*
- In your last sales job, aside from your sales duties, describe any other job duties for which you were responsible. *(Were they also involved in training, management duties, or service duties? Does it appear that they struggle to say “no” when asked to take on responsibilities outside of their sales role?)*
- Describe how you say “no” to someone who asks you to do something that is not your responsibility or if you can not make the time commitment.
- Describe a time when you over-promised services to a customer that you could not deliver. What did you do to satisfy the customer? If I were to speak to your previous manager, what would they tell me about any coaching they gave you regarding making too many commitments that were impossible to deliver?
- Describe a challenge that you faced recently at your job. What did you do to overcome this challenge? How long did it take you to realize the challenge, and how long did it take you to solve the problem?
- What do you think has the greatest impact on a person’s success? *(Optimistic People believe that their own hard work, efforts and decisions will have the greatest positive impact. Pessimistic people believe in lucky breaks and that success is in the stars.)*
- Describe where you see yourself in 5 years and the plan you have for getting there. *(Optimistic people have concrete plans and goals. Pessimistic people talk in vague, general terms about goals. They appear to be floating through life with no direction.)*

CTS Supplemental Questions

Questions to Ask References: (Ask as many of these questions as necessary until you are confident that the candidate has the necessary behaviors.)

- How positive is _____?
- Would you describe them as overly optimistic? If so, what challenges did this cause?
- What coaching was necessary to help them deal with being too negative or too overly optimistic?
- How receptive to coaching were they?
- Why did _____ leave this job with you?
- Would you hire them back?
- Did _____ struggle with having too many outside commitments that caused their sales activities to suffer?
- Did _____ struggle with over-promising services to customers that could not be delivered?
- Did _____ struggle with coming to work often tired and stressed due to too many commitments in their life?
- Describe their metrics in these areas:
 - *Closing ratio*
 - *Monthly sales target*
 - *Monthly/Annual Sales results*
 - *Number of daily/weekly quotes completed*
 - *Number of daily phone calls made*

Reference Check Questionnaire

Former Employer/Manager no. 1

Candidate Name: _____ *Date:* _____

This is _____ with _____. _____ is interviewing with us as a salesperson. They listed you as a reference. Is this a good time to allow me to ask you a few questions about them?

1. I understand that they worked for you beginning on _____ and ending on _____. Is that correct?
2. What were they hired to do?
3. Why did they leave?
4. How was their attendance record?
5. What positive words of reference do you have?
6. What were their best qualities as a salesperson?
7. In what areas do they need the most development?
8. How ambitious and driven is _____? What about them makes you say that?
9. How confident were they? What about them makes you say that?
10. Would you rehire them?
11. Who else in the company did _____ work for/with who would also give them a reference?

Reference Check Questionnaire

Former Employer/Manager no. 2

Candidate Name: _____ *Date:* _____

This is _____ with _____. _____ is interviewing with us as a salesperson. They listed you as a reference. Is this a good time to allow me to ask you a few questions about them?

1. I understand that they worked for you beginning on _____ and ending on _____. Is that correct?
2. What were they hired to do?
3. Why did they leave?
4. How was their attendance record?
5. What positive words of reference do you have?
6. What were their best qualities as a salesperson?
7. In what areas do they need the most development?
8. How ambitious and driven is _____? What about them makes you say that?
9. How confident were they? What about them makes you say that?
10. Would you rehire them?
11. Who else in the company did _____ work for/with who would also give them a reference?

Reference Check Questionnaire

Former Co-worker no. 1

Candidate Name: _____ *Date:* _____

This is _____ with _____. _____ is interviewing with us as a salesperson They listed you as a reference. Is this a good time to allow me to ask you a few questions about them?

1. In what capacity did you work with _____?
2. When did you work with _____?
3. What is _____ really good at?
4. What did they really not like to do?
5. Why did they leave?
6. How ambitious and driven is _____? What about them makes you say that?
7. How confident is _____ in their work? What about them makes you say that?
8. Would you look forward to working with them again?

Reference Check Questionnaire

Former Co-worker no. 2

Candidate Name: _____ *Date:* _____

This is _____ with _____. _____ is interviewing with us as a salesperson They listed you as a reference. Is this a good time to allow me to ask you a few questions about them?

1. In what capacity did you work with _____?
2. When did you work with _____?
3. What is _____ really good at?
4. What did they really not like to do?
5. Why did they leave?
6. How ambitious and driven is _____? What about them makes you say that?
7. How confident is _____ in their work? What about them makes you say that?
8. Would you look forward to working with them again?

Reference Check Questionnaire

Business Person/Former Customer no. 1

This is _____ with _____. _____ is interviewing with us as a salesperson. They listed you as a reference. Is this a good time to allow me to ask you a few questions about them?

1. How do you know _____, and how well do you know them?
2. Have you ever purchased from them?
3. Would you buy from them again?
4. How would you rate them as a salesperson on a 1-10 scale? Why?
5. As a potential salesperson for me, what do you see as their strengths?
6. As their new manager, in what areas of sales do you think I will need to train them the most?
7. How ambitious and driven is _____? What about them makes you say that?
8. How confident is _____ in their work? What about them makes you say that?

Reference Check Questionnaire

Business Person/Former Customer no. 2

This is _____ with _____. _____ is interviewing with us as a salesperson. They listed you as a reference. Is this a good time to allow me to ask you a few questions about them?

1. How do you know _____, and how well do you know them?
2. Have you ever purchased from them?
3. Would you buy from them again?
4. How would you rate them as a salesperson on a 1-10 scale? Why?
5. As a potential salesperson for me, what do you see as their strengths?
6. As their new manager, in what areas of sales do you think I will need to train them the most?
7. How ambitious and driven is _____? What about them makes you say that?
8. How confident is _____ in their work? What about them makes you say that?

Additional Interview Questions to Ask References

Based upon your areas of concern, ask each reference one or more of the questions listed under that topic. For example, if you are concerned about the candidate's "Receptivity to Coaching", ask the questions under the heading "Accepts Responsibility/Receptivity to Coaching".

Honesty

Can you trust everything _____ tells you? Would you describe _____ as ...

____ a very transparent person who always speaks with clarity and accuracy?

____ a pleaser who attempts to tell you what you want to hear so they don't disappoint you?

____ a person who tells you what you want to hear by embellishing to make him/herself look better?

Work Ethic

Describe the work ethic of _____.

What is an example of his/her hard work ethic?

Concern for Others

How well does _____ get along with others?

What is an example of a conflict _____ had with you or another employee? How did he/she react when you attempted to coach him/her past the conflict?

Accepts Responsibility/Receptivity to Coaching

How receptive to coaching is _____?

What are some areas where you have had to coach him/her? How long did it take _____ to respond?

Time Management

How well does _____ manage his/her time?

What struggles does _____ have with getting too bogged down in details?

What struggles does _____ have with spending too much time on the phone either providing too much information or nurturing others too much?

Would you describe _____ as too chatty, or someone who quickly gets to the point and moves the conversation along?

What sales activity tracking tools did _____ use to help him/her be more productive?

Motivations

How competitive is _____?

How money motivated is _____?

Belief in Others

How long did it take for you/others to feel that _____ trusted you/others? When _____ disagrees with something you say, does he/she...

____ *become argumentative?*

____ *diplomatically discuss his/her disagreements?*

When selling, does _____ respond to objections with a

____ *diplomatic tone that causes the prospect/customer to feel respected?*

____ *argumentative tone that causes the prospect to continue to argue and object?*

Optimism

Would you describe _____ as ...

____ *the positive person that others go to in order to be encouraged and lifted up, and who would attempt to stop negative talk among the team?*

____ *the person who would join in when others were talking negatively and complaining?*

How would you describe _____'s outlook on life?

____ *positive and optimistic?*

____ *mostly seeing the negative side of situations?*

____ *someone who was on top of the world one day and down on the world the next day?*

Describe _____'s self esteem. Did he/she see him/herself as ...

____ *rising to success and deserving of success?* ____ *unworthy of success?*

Sales Production

_____ told me that he/she was ranked # ___ on the sales team. What level do you rank them?

_____ told me that their sales were _____ (dollars/applications/sales) per month. How many (dollars/applications/sales) per month do you think he/she produced? Is this information recorded somewhere, or is your answer based on your best guess?

What percentage of quota did _____ average every month?

Describe _____'s skills in pivoting to other products and closing the sale.

How many applications/sales per month did _____ make from pivoting to other products? Is this information recorded somewhere, or is your answer based on your best guess?

What sales training or areas of coaching do you think _____ needs to be more successful?

___ *Closing the sale?*

___ *Rebounding from rejection?*

___ *Having more sales activities/time management?*

___ *Making an effective presentation?*

___ *Getting more referrals?*

What advice would you give _____ in order to help him/her succeed in this new position?

Learning Speed/Style:

How smart is _____?

How quickly does _____ learn new information and new tasks? Is _____ a...

___ *quick starter?* ___ *medium starter?* ___ *slow starter?*

Additional Questions:

What about _____ drives you crazy?

Final Interview Questionnaire

Candidate Name: _____ Date: _____

Explanation

This structured and scored interview should be conducted as the final cross-check. By now, you should have a list of the potential strengths and weaknesses of the candidate. Use this questionnaire to confirm those areas where you think the candidate will need future coaching. Spend more time on the areas of suspected challenge, and spend less time on those areas where you think you have the greatest understanding of the candidate.

Notes...How to Do the Interview

In the beginning, relax them and gain rapport. When you are ready to proceed, make a simple statement like “Let’s begin the interview now” to make the transition. Do not make apologies or attempt to rescue. Begin.

At the end of the interview, do not rescue. The interviewing person may have had an emotional experience. If you feel that you need to ask if the person interviewed has any questions, keep discussion to pertinent issues.

Do not get drawn into a discussion of the interview process.

Stay on track. This is especially important in your first few interviews.

Remember, we really do not speak the same language. There is a tendency in an initial interview to think we have obtained much more information than we really have. If you do not understand the answer to each question, ask a secondary question to verify the answer. Example: “Help me with a little more information on that.” “Why?” “Could you be more specific?” “Anything else you would like to add?” “How do you feel about that?”

Expand the interviewing person’s paradigm. First responses are going to be intellectual and as safe as possible. Secondary questions push the person toward the edge of their paradigm. A third question, if applicable, really moves the person into a deeper, more meaningful answer.

In any interview, it’s easy to get answers that appear to be truth. You need to be sure that you are clear on: 1) the words used, 2) their definition of the words, and 3) their emotional feelings/motive(s) behind the words.

Take your time and be as present in the interview as you possibly can.

Listen to what the candidate feels, as well as to what they say. If you are not totally clear on any answer, ask more questions.

Opening Questions

(Gain an understanding of where they are in the decision process.)

1. **What have you learned about our company that stands out the most?**
2. **What benefits do you see in this career?**
3. **What are your strengths that would help you in this job?**

Character Traits *(Honesty, Work Ethic, Concern for Others, Responsibility)*

*The next set of questions will help you obtain notes related to these character traits: **Honesty (H)**, **Hard Work Ethic (HWE)**, **Personal Responsibility (PR)**, and **Concern for Others (CO)**. Questions that pertain to one of these traits will be dispersed in a random order to keep the candidate from getting a “feel” for which character trait is being explored. To get a truthful or revealing response, a series of questions will often start with an anchor question, and then you will ask the follow-up questions shown.*

Definitions

Honesty (H) *(free of deceit and untruthfulness; sincere; real; authentic)*

Hard Work Ethic (HWE) *(someone who works with energy and commitment to sales tasks; no laziness; a belief that being lazy is morally wrong)*

Personal Responsibility (PR) *(being a good steward of resources and duties surrounding opportunity ... having obligations – does not hide; goes beyond job description; is coachable and will not blame others for personal failures)*

Concern for Others (CO) *(sees their roles as ones of service – performs duties for others with devotion and concern for their welfare)*

Final Interview Questionnaire

What will you do if our products or services are not what a prospect needs or wants?

(Award 5 points only if the candidate will tell a prospect that your company can't help them, or if the candidate will direct them to another source who will. Award 0 points if the candidate will attempt to sell the prospect anyway.)

(H) _____ pts.

Please tell me about a time in your life when you had to sacrifice in order to achieve something important.

-What did you sacrifice?

-Why?

(Award 0-5 points based on the strength of something notable, & time was sacrificed & work effort was expended, & if the candidate explains the motivation as the need to achieve, win, provide for others, or reach a goal.)

(HWE) _____ pts.

Tell me a time when you improved a task or job you were given by doing things not required by your supervisor.

(Award 5 points only if the candidate explains how he/she went beyond the job description to improve the task or job. Award "0" points if their example is vague with respect to the question.)

(PR) _____ pts.

What is the thing you most enjoy doing for other people. What do you like about it? Why do it?

(Award 5 points only if the candidate can give an example and if their enjoyment and purpose seem genuine and real. Award 0 points if they have a difficult time with the question or cannot explain their motivation.)

(CO) _____ pts.

If I was your sales manager, would you stretch the truth in order to make a sale? (If they say yes, skip to the next character question.) If they say no ask, "What if it wouldn't hurt anyone but would increase sales?"

(Award 5 points only if the candidate continues to say "No." Award 0 if they hedge or qualify their answer.)

(H) _____ pts.

Final Interview Questionnaire

When we call them, what will your past two bosses or supervisors say about your work ethic? What will your previous co-workers say? What examples will they give us?

(Award 5 points only if the candidate can give reasonable examples of a hard work ethic. Award 0 points if they cannot give them.)

(HWE) _____ pts.

What's the single issue that keeps you from achieving your maximum potential? (If they have been in sales, add "in sales.")

- What are you doing, or what do you plan to do to develop past this?

- How will this development benefit you?

- What are two other areas in which you need more development for what we do?

(Award 5 points if they seem to understand their weaknesses and are working toward improvement. Award 0 points if their answer is vague or they are without a plan.)

(PR) _____ pts.

Please describe, with an example, what you believe to be a considerate salesperson and then give me an example of an inconsiderate one.

(Award 5 points only if the candidate understands what it means to be considerate of another person and if he/she can describe an inconsiderate salesperson. Award 0 points if they have a difficult time with the question or cannot describe the two types.)

(CO) _____ pts.

Which of these traits is the most important one for the type of sales we do? Persistence, Self-Discipline, Honesty, or Hard Work Ethic?

(Award 5 points only if the candidate says that Honesty is most important. Award 0 points for any other answer.)

(H) _____ pts.

Give me another example of how you once went about accomplishing an important goal for yourself. What was it about yourself that contributed most to your success? What else?

(Award 5 points only if the person speaks with confidence and gives specific reasons to support the basis of their confidence. Award 0 points if the candidate does not speak with strength or if their reasons seem vague.)

(HWE) _____ pts.

Final Interview Questionnaire

What's the minimum amount of hours per week that a commission salesperson should work to meet their income and sales objectives? Why that amount?

(Award 5 points only if the candidate talks about putting in the hours that it takes to fulfill their commitments and earn the income they need (without sacrificing family). Do not give any points if a candidate chooses and defends a 40 hour work week.)

(PR) _____ pts.

If we expect you to go above and beyond the sale to satisfy a customer, please tell us what you think that might look like. Can you give us a previous work experience that shows you have given this type of service before?

(Award 5 points only if the candidate seems to understand above and beyond customer service and if he/she can give a good example of serving in that way. Award 0 points if the candidate seems not to understand and cannot give a good example.)

(CO) _____ pts.

Personality Traits *(Deadline Motivation, Recognition Drive, Assertiveness, Independent Spirit, Coachable, Optimistic)*

Deadline Motivation *(urgency level)*

Other than obtaining employment, what goal is important for you to accomplish in the next 30 days? How are you tracking progress toward reaching this goal?

- Why is it important?
- How much do you have left to complete?
- How will you (or are you) measuring progress?

(Award 5 points only if the goal is exact and measurable and they can tell you how close they are to its achievement and their motivation for it. Award 0 points if they cannot be specific, do not explain the motivation, and they are unsure of what % remains to completion.)

_____ pts.

Would you describe yourself as highly motivated and driven? What evidence would you point to that shows this is true? What are 3 things remaining on your to-do list for today?

(Award 5 points only if the evidence they provide describes someone with a sense of time urgency for completing tasks or achieving goals. Award 0 points if specific commitments, tasks, and deadlines are not provided.)

_____ pts.

Final Interview Questionnaire

Recognition Drive (level of desire to accumulate many casual relationships for the purpose of doing business, and whether or not they are motivated by a culture of public recognition)

What do you prefer to do with the majority of your time; first, during work, and second, after work?

1) Being with others in lots of social situations, or 2) Being with a few select people at a time?

(Make sure you get separate answers for both during and after work. Award 5 points only if the candidate seems to enjoy spending time with lots of people in social situations - especially after work. Award 0 points if the candidate would rather be alone.)

_____ pts.

How motivated are you to win company recognition of your sales results? What do you do with the plaques and awards you receive?

(Award 5 points only if the candidate gets excited about winning awards and displays the awards for others to see).

_____ pts.

Assertiveness (measures the level of natural ability to ask personal or sensitive questions, present and tell people what to do with confidence, and ask for buying commitments)

How confident are you in your job performance?

Why?

What is your confidence based on?

(Award 5 points only if the person speaks with confidence and gives specific reasons to support the basis of their confidence. Award 0 points if the candidate does not speak with strength or if their reasons seem vague.)

_____ pts.

What about yourself makes you a good salesperson – better than most we will see? Sell _____ (your company's name) to me.

(Award 5 points only if the person speaks with confidence, shows assertiveness in the presentation, and doesn't hesitate to find answers and responses. Award 0 points if the candidate does not speak with strength, has slow reactions, or does not look you in the face selling your company to you.)

_____ pts.

Final Interview Questionnaire

Independent Spirit *(amount of desire to make self-reliant decisions and to control the sales process in order to keep the process moving forward in a direction of their choosing)*

Do you prefer to work as a part of a team and in group situations, or would you rather work solo where you have more control and flexibility? Why do you think you feel this way?

(Award 0-5 points based on how much the person prefers independence and being in charge; 5 being most in charge and independent.)

_____ pts.

Do you prefer making personally researched decisions when given a project to do, or do you prefer collaboration in a team setting and a participative approach to problem-solving.

(Award 0-5 points based on how much the person prefers independence and being in charge; 5 being most in charge and independent.)

_____ pts.

Coachable *(how well a person will accept instruction from someone else or whether or not they will admit weaknesses and seek personal development – also see the character trait of personal responsibility)*

If we divide business development into these parts – finding prospects, maintaining high-activity, handling rejection, setting appointments, and selling face-to-face – which would you like further training and improvement on first? (You may have to strengthen this question by saying, “Of course no one is perfect, so in which area are you least effective?”) What challenges you most in this area?

(Award 5 points only if the person chooses one of the areas and if they give you a specific challenge. Award 0 points if the candidate continues to avoid giving specific answers.)

_____ pts.

If you could change one bad decision you made or action you took during the past two to five years, what would that be and why would you change it? What about you caused you to do the wrong thing or make the wrong decision? What have you learned from the situation?

(Award 5 points only if the response appears real and authentic and if the candidate takes ownership over making the bad decision/action. Award 0 points if the candidate seems fake, guarded, or will not reveal a bad decision/action.)

_____ pts.

Final Interview Questionnaire

Optimism (a measure of a person's belief in their ability to get past obstacles that stand in the way of sales performance and goal achievement)

Why do most people fail at sales? Is it because of their bad choices, or because of situations they could do nothing about? If you fail in our sales position, which will it be - because of your bad choices, or because of situations beyond your control?

(Award 5 points only if the person believes they will make the right choices and that only insurmountable situations will stop them. Award 0 points if the candidate chooses "bad choices.")

_____ pts.

If you get this job, and in the beginning the percentage of people who decide to buy from you drops each month below our average for new performers, will it be because of your poor skills or because something happened to you that was different than what other new recruits faced?

(Award 5 points only if the recruit believes the drop will be because they face something different than what other recruits faced. Award 0 points if the candidate chooses "poor skills.")

_____ pts.

Finds Prospects

How do you think we should go about finding new customers here in our business? How would you go about this in the first ninety (90) days?

(Award 5 points only if the candidate presents reasonable or creative plans of action and seems sure of their prospecting ability or of an unlimited pool of possibilities. Award 0 points if they are unsure of how to proceed, if they share negative views, or if they believe the opportunities are limited.)

_____ pts.

As our salespeople work each day to find new business, how will your skills match up with theirs? Why do you think you will perform as well as our best?

(Award 5 points only if the candidate appears confident and unstressed and sure of their abilities. Award 0 points if they do not give you adequate assurance of their ability to find or learn to find prospects.)

_____ pts.

Final Interview Questionnaire

Maintains High Activity

Describe the perfect workday for you. Will other co-workers describe you as fast-paced, deliberate and sure, or as analytical and calculated?

(Award 5 points only if the candidate appears to prefer a fast-paced do-it-now work environment. Award 0 points if the candidate does not seem to prefer this.)

_____ pts.

Sales Competencies *(Finds Prospects, Maintains High Activity, Handles Rejection, Sets Appointments, Sells Face-to-Face)*

How stressful will it be for you to go at a moderate or easy-going pace most of the day if you come to work for us? Will that be your preferred work pace or do you have another preference?

(Award 5 points only if the candidate prefers a fast-paced environment. Award 0 points if they prefer a moderate or easy-going pace.)

_____ pts.

Handles Rejection

How would you handle repeated rejection, criticism, or failure when communicating with people? Tell me about a time when someone criticized you or rejected your attempt to persuade them and what you did?

(Award 5 points only if the candidate appears to understand how they would react and what they would do when facing rejection. Award 0 points if the candidate does not seem to know how they would cope with rejection.)

_____ pts.

Please describe what you would do if someone rejected the product or service you selected to solve their problems or fill their needs? What would you do to rebound past the rejection?

(Award 5 points only if the candidate appears to understand how they would react and what they would do when facing rejection. Award 0 points if the candidate does not seem to know how they would cope with rejection.)

_____ pts.

Final Interview Questionnaire

Sets Appointments

What if we require our sales professionals to cold call previous customers, friends and strangers as a part of their employment? Could you do it? What would you like about it? Dislike about it? What level of success do you think you would have? Why? What is it about you that would cause you to do well?

(Award 5 points only if the candidate appears self-confident and assertive about their ability to set appointments and talks about why they could do this task. Award 0 points if the candidate does not seem to present credible evidence or have the motivation and ego drive required.)

_____ pts.

When you are given a referral to a prospective customer, what will you say on the phone to set an appointment for a meeting?

(Award 5 points only if the candidate shows an assertive confidence as they attempt to script this out loud. Award 0 points if the candidate does not appear confident or doesn't try to provide a verbalized response or does not do so with a good/coachable attitude.)

_____ pts.

Sells Face-to-Face *(Some candidates may have had sales training and mentoring. Others may have become self-educated during previous jobs and/or through books, tapes, the web, etc. Through the Screening questions, the CTS Sales Profile, and the First Interview, you are learning much about the candidate's ability to sell and persuade. The following questions will help you understand what they know about their profession's face-to-face sales process.)*

In an appointment by phone or when face-to-face with a potential customer, what is a salesperson's most important skill? Why? How does this help?

(Award 5 points only if they mention listening and if they understand the importance of discovering a prospect's needs. Award 0 points if they do not mention an important face-to-face skill.)

_____ pts.

What sales training have you had or what relevant books have you read in the past? How did this training benefit you (or summarize what you learned from books)? What does the term consultative selling mean to you?

Final Interview Questionnaire

What does the term sales process mean to you? Start at the beginning and tell me what you think the steps are within the consultative sales process.

(Award 5 points if they understand the face-to-face skills of consultative salespeople. Award 0 points if they cannot talk about the professional face-to-face skills in the sales process.)

_____ pts.

Time Management

How do you keep track of things to do and of your appointments? What tools do you use? What benefits do you get from using these tools? May I see what you use?

(Score 5 points if their tracking tool is with them and they use it well. Score 0 points if they do not currently have a method for time management.)

_____ pts.

Candidate's Questions

What questions do you have for me? Answer their questions and continue to ask this question until they have no more responses.

(Award 5 points if the candidate asks how they did, if they ask you for the job, or about the next step.)

_____ pts.

Total = _____ pts = _____ %

180 Possible

(Note: Subtract 5 points each for a lack of punctuality and poor dress/appearance.)

Former Manager's Perspective on the Candidate

Tell the candidate, "I am about to ask you some questions related to your last 2 significant sales positions. I am going to ask you the same questions related to each position."

Use Follow-up Questions when appropriate. Use these follow-up questions to get the details on the candidate's statements: *What? How? Tell me more. What do you mean? How so? What is a good example of that? What was your role? What did your boss say? How did you do that? What happened? What else? How did that go? How did you feel? How much money did you save? How did you deal with that?*

Final Interview Questionnaire

Sales Position No. 1

1. **What were you hired to do? i.e. How was your success measured?**
2. **What accomplishments are you most proud of? (The best candidates talk about outcomes linked to expectations).**
3. **What were some low points during that job? (Get the candidate to share the lowest lows).**
4. **What part of the job did you not like?**
5. **How did your sales stack up against your peers?**
6. **What was your boss's name, and how do you spell that?**
 - **What was it like working with him/her?**
 - **How will your former boss rate your performance on a scale of 1-10?**
 - **What will he/she tell me were your biggest strengths and your areas for improvement?**
7. **How would you rate, on a scale of 1-10, the positive impact you had on the organization?**
8. **Why did you leave that job?**
9. **How did/will your boss react to you leaving?**

Final Interview Questionnaire

Sales Position No. 2

1. **What were you hired to do? i.e. How was your success measured?**
2. **What accomplishments are you most proud of? (The best candidates talk about outcomes linked to expectations).**
3. **What were some low points during that job? (Get the candidate to share the lowest lows).**
4. **What part of the job did you not like?**
5. **How did your sales stack up against your peers?**
6. **What was your boss's name, and how do you spell that?**
 - **What was it like working with him/her?**
 - **How will your former boss rate your performance on a scale of 1-10?**
 - **What will he/she tell me were your biggest strengths and your areas for improvement?**
7. **How would you rate, on a scale of 1-10, the positive impact you had on the organization?**
8. **Why did you leave that job?**
9. **How did/will your boss react to you leaving?**

Interview by Team Member Questionnaire

Team Member Name: _____

Candidate Name: _____

Date: _____

Ask all

1. **What are your career goals?**
2. **What about our company do you like the most?**
3. **What do you think it would take to do this job?**
4. **What are you really good at that would help you in a sales position with us?**
5. **What type of people do you get along with the best?**
6. **What type of people do you have trouble getting along with? Tell me about a time in a previous job that you had trouble getting along with someone. What would you do differently now?**

Evaluation by Team Member

Please rate on a scale of 1-10 the following questions:

1. **How likely would you be to purchase our products from this candidate?**
1 _____ 5 _____ 10 Reason for your rating –
2. **How proud would you be to introduce this person to your best client?**
1 _____ 5 _____ 10 Reason for your rating –
3. **How likely would you be to take this person with you on a day-long trip boating, hiking, golfing, etc.?** 1 _____ 5 _____ 10 Reason for your rating –

1 _____ 5 _____ 10 **OVER ALL RATING**

Illegal Interview Questions

Employers should not ask about any of the following. Do not make hiring decisions based on any subject listed below, as that decision would be discriminatory.

1. **Race**
2. **Color**
3. **Sex**
4. **Religion**
5. **National Origin**
6. **Birth place**
7. **Age**
8. **Disability**
9. **Marital/family status**

Recruiters and managers acting for and as a representative of the employer should not ask ANY questions not related to the qualifications required in the job for which a candidate is interviewing.