



Document 16-04

Telephone Sales Face-to-Face Interview Form

Face-to-Face Interview Summary Rating Form

Candidate: _____

Interviewer: _____

Face-to-Face Interview Date: ____ / ____ / ____

Secondary Interview Date: ____ / ____ / ____

Knowledge, Skills, and Abilities to Demonstrate	Rank
1 - Impact and Influence/Consultative Selling: Ability to persuade, convince, influence, and/or impress others in order to get them to support a specific agenda, make a specific kind of impression, or take a specific course of action.	
2 - Relationship Building/Managing Accounts: Ability and propensity to build and maintain friendly, reciprocal, and warm relationships or networks of contacts with people who are, or might someday be, useful in achieving sales and service-related goals.	
3 - Customer Focus: Knowledge of principles and processes for satisfying the needs of internal and external customers. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.	
4 - Planning and Organizing: Identifies the priorities, processes, and practical actions necessary to achieve an objective or idea.	
5 - Achievement Motivation: Ability to achieve ever increasing levels of performance. Involves setting high standards and challenging goals for self.	
6 - Communication: Conveys ideas and information in a clear, direct and unambiguous way. Listens, receives, and understands messages conveyed by others.	

Total – After face-to-face initial interview	
Total – After secondary interview	

1 Impact and Influence/Consultative Selling

Desired behavior: Presents ideas and opinions in a constructive logical way and gathers all relevant information about customer's needs.

- a) Describe a time when you needed to present an idea or opinion in order to influence another person. Were you successful? Why or why not?
- b) Describe a time when you were systematic in developing a sales strategy. What were the steps? How did you influence the customer to follow these steps? What was the outcome?
- c) Think of a time when you've coached someone on a skill or knowledge. Tell me how you did it. Did his or her behavior change? Why or why not?
- d) How would you handle a customer who said we were overpriced?
- e) How would you respond to a customer who said it is difficult to deal with us because our organization is too big?

Discussion indicates the candidate:

Exhibits little or no ability to overcome obstacles. Does not respond well to resistance or pushback when attempting to motivate others to action.

Some general ability to generate progress in motivating individuals to action. Can overcome some obstacles, but gets stuck with others. Can overcome some difficult situations to be successful.

Demonstrates clear ability and motivation to persuade others to his/her point of view. Drives relationships toward mutually beneficial results. Can overcome challenges and difficult situations to be successful.

Unacceptable

Acceptable

Outstanding

1

2

3

4

5

Circle your overall rating of the candidate on this desired behavior.

Notes:

2 Relationship Building/Managing Accounts

Desired behavior: Effectively builds relationships with customers that facilitate closing sales and juggles multiple customer accounts.

- a) Think of a project or business endeavor that was successful because of the strong relationships you built. How did you build and maintain the relationships?
- b) Tell me about the best business relationship you have built. How did it begin? What makes it special?
- c) Tell me about a time when you've juggled multiple tasks and projects. What did you do? How did it work?
- d) Describe to me how you establish rapport in a new relationship.

Discussion indicates the candidate:

Does not demonstrate the ability to build relationships or to translate relationships into sales opportunities.

Has some ability to build relationships and to leverage these relationships in a selling situation.

Demonstrates ability to build, nurture, and leverage relationships in a selling situation.

Unacceptable

Acceptable

Outstanding

1

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Circle your overall rating of the candidate on this desired behavior.

Notes:

3**Customer Focus**

Desired behavior: Identifies, understands, and gives priority to satisfying the needs of internal and external customers.

- a) How would you respond if a project you were involved with failed because of someone else inside the organization?
- b) Building rapport is sometimes a very challenging thing to do. Describe a time when you were able to build rapport with someone at work even when the situation was difficult.
- c) If presented with a problem regarding order fulfillment, how would you start the process of addressing the customer's concerns?
- d) What would you do if a customer received a service and the quality was questionable?
- e) Tell me about a time when a customer asked about a product/service and you didn't know the answer. How did you get the answer?

Discussion indicates the candidate:

Does not view meeting the expectations and requirements of customers as paramount for success. Will often put personal or other priorities ahead of those of the customer. Does not effectively work to understand the needs of customers.

Consistently acts with customers in mind and considers customer service of paramount importance to the business. Builds and maintains effective relationships with customers and gains their trust and respect.

Interacts regularly with stakeholders to gain feedback and to ascertain ways to improve service. Works to anticipate customers' future needs. Strategically plans ways to demonstrate superior customer service.

Unacceptable

Acceptable

Outstanding

1

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Circle your overall rating of the candidate on this desired behavior.

Notes:

4**Planning and Organizing**

Desired behavior: Identifies the priorities, processes, and practical actions that are necessary to achieve an objective or idea.

- a) Think of a time when you had to plan your work activities over an extended period of time to accomplish a goal. What did you do? How did you document your plan?
- b) Have you ever had a plan that needed to be adjusted due to events beyond your control? What happened? What did you do?
- c) Tell me about a time you had to plan with a manager. What did you do? What was the result? How often did you plan?
- d) Describe a time in your life where you had a goal with a time horizon of at least one month. How did you accomplish the goal? What did you like/dislike about the experience?

Discussion indicates the candidate:

Little demonstrated ability to plan over extended periods of time. Rigid approach and style. Little flexibility.

Some ability to plan over extended periods. Some adherence to planning over time. Reasonable flexibility to change based on conditions.

Shows ability to plan over an extended period of time and to adjust behavior to changing conditions. Demonstrates flexibility to change.

Unacceptable

Acceptable

Outstanding

1

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Circle your overall rating of the candidate on this desired behavior.

Notes:

5**Achievement Motivation**

Desired behavior: Demonstrates the drive and determination to achieve ever-increasing levels of performance.

- a) Describe a challenge you had in overcoming a co-worker's or customer's objections. What was the end result?
- b) Tell me about a time when you needed to be especially persistent in pursuing a task. What did you do?
- c) Tell me about a situation in which you aggressively capitalized on an opportunity and converted something ordinary into something special.
- d) Tell me about a project you worked on that required you to persist in overcoming a series of obstacles.
- e) How would you respond if the first five calls you made in a day did not result in sales opportunities?
- f) How would you handle a call with a customer who has used our services and is irate with us? How would you get the relationship back on track?
- g) How would you deal with a customer who just couldn't make up his/her mind?

Discussion indicates the candidate:

Demonstrates little or no ability to overcome obstacles. Seems stymied by resistance and customer blockages.

Some general ability to generate progress. Can overcome some obstacles, but seems to get stuck with others. Can overcome some difficult situations and be successful.

Demonstrates ability to "ask for the sale." Drives relationships toward mutually profitable results. Can overcome challenges and difficult situations to be successful.

Unacceptable

Acceptable

Outstanding

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Circle your overall rating of the candidate on this desired behavior.

Notes:

Desired behavior: Conveys ideas and information in a clear, direct, and unambiguous way.

- a) Tell me about a time when your active listening skills on a telephone call paid off for you.
- b) Tell me about a time when you had to present complex information over the phone. How did you ensure that the other person understood without visual clues?
- c) Describe a time when you were able to effectively communicate a difficult or unpleasant idea to someone else over the phone.
- d) We find what works with one person does not necessarily work with another; we must be flexible in our style of relation to others. Give me an example of when you had to vary your communication style with a particular individual.

Discussion indicates the candidate:

Does not consider the needs of audience when presenting information. Fails to keep stakeholders informed of pertinent information. Dictates rather than facilitates two-way conversation.

Conveys ideas in a clear, unambiguous way. Exhibits active listening skills. Verifies information and understanding before drawing conclusions.

Effectively adjusts communication style to meet the needs of the audience. Presents complex information in an easily understandable way. Ensures all pertinent information is provided to concerned parties.

Unacceptable

Acceptable

Outstanding

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Circle your overall rating of the candidate on this desired behavior.

Notes:
