

THE FIRST INTERVIEW

POWER INTERVIEWING

PROFESSOR P



Preparing People for a Competitive Workforce.

THE FIRST INTERVIEW CHECKLIST

Two Days Before the Interview

- ☐ Confirm the date, time, and location
- ☐ Contact Name and phone number
- ☐ Names and titles of the interviewer(s)
- ☐ Protocol upon arrival (where to park, Security protocols or procedures)

One Day before the Interview

- ☐ Select and lay out your interview clothing
- ☐ Make sure you have all supplies needed for grooming

The Interview Day

- Plan ahead.
- Do a practice run.
- Arrive 15 minutes early.

Once you Arrive

- Be aware that the interview begins when you step foot in the parking lot or the waiting room on Zoom.
- Be courteous, friendly, and professional to all (including administrative support professionals).
- Make a restroom visit.

What do I Bring?

- ☐ Resume
- ☐ Identification
- ☐ Copies of the complete job description
- ☐ Pen and padfolio
- ☐ Copy of the calendar for next month
- ☐ Portfolio, licenses, and certifications
- ☐ List of references
- ☐ Questions to ask Interviewer(s)

You made it past the initial screening techniques! That's exciting, but don't be fooled. The first interview is still largely a screening process, and the hiring manager's job is to weed out candidates quickly.

Get the job by accomplishing and communicating themes.

It all starts with getting prepared and creating a set of talking points. Start by taking an introspective look at your career. Imagine you're a politician. That might sound a little strange but bear with me. When a politician begins a campaign to run for office, they first create a set of talking points.

These are the themes on which the candidate will base their entire campaign. They will revert to these talking points anytime they are asked a question, or they are making a significant point. So, like a politician, you must begin by creating talking points highlighting your accomplishments and summarizing your value proposition.

*What are the highlights of your career?
Draw them out!*

Remember, it's not enough to memorize your talking points—you must also be able to articulate and elaborate on each point. Not only will your talking points allow you to sell yourself, but they will also prepare you to answer the questions you will be asked. So write your talking points and have them in front of you throughout the interview.

Here's an example:

- *I have over fifteen years of financial services sales and marketing experience. I have been in the top 10 percent of sales for five years out of forty other regional vice presidents. My focus has always been on continuing education, and I consider myself a "lifelong learner."*
- *I have both my CIMA and CFA designations and completed numerous public speaking and presenting courses.*
- *I served on the leadership council for the last two firms where I was employed.*

Notice how the candidate quickly summarized her resume, highlighting the high points and their success.

Know the Types of Questions.

Closed-Ended Questions

These can be answered with a few words.

- "How many years did you work for your last employer?"
- "What's the longest you've worked for any employer?"
- "Are you comfortable working remotely or in a hybrid environment?"
- "Do you prefer working with a team or independently?"

Open-Ended Questions

These are broader, offering more freedom in answering them.

- **Behavioral:** An interview technique that focuses on a candidate's past experiences, behaviors, knowledge, skills, and abilities by asking the candidate to provide specific examples of when he or she has demonstrated certain behaviors or skills as a means of predicting future behavior and performance.
- **Situational:** An interview technique that gives the interviewee a hypothetical scenario and focuses on a candidate's past experiences, behaviors, knowledge, skills and abilities by asking the candidate to provide specific examples of how the candidate would respond given the situation described.

Secondary Questions

Also known as probing questions, follow up on *Open-Ended Questions*. Probes cannot be easily planned in advance. It is generally because of one of two reasons:

- They are genuinely interested in learning more
- You did not provide a follow the **STAR or PAR method** (*you will learn more about this in "The Second Interview"*)

You can use the following questions to follow up on the prepared behavioral questions:

- "Tell me more about that."
- "What led you to . . ."
- "What eventually happened?"
- "Looking back, what would you do differently now, if anything?"
- "Compare this to what others have done."
- "What did your supervisor say or do?"
- "What was the outcome?"
- "What was the situation?"
- "Why did you do that?"
- "How did others see it?"
- "What kind of feedback did you get?"
- "What did you learn?"
- "What did everyone else do?"
- "What else can you remember about that situation?"
- "Give me more detail about what you did, please."
- "What exactly did you say?"
- "I'd like to hear more."
- "What was the financial impact?"

Potential Question:

Why are you interested in this role/company/industry?

Potential Question:

Why should we hire you

There are a few things you must do and a couple you must avoid when answering this question.

- Show how you'll add value to the company.
- Talk about you, not your skills.
- Focus on being yourself.
- Don't focus on qualifications.
- Don't give generic answers.
- Highlight common characteristics from the job posting.

I want this job because I had the opportunity to be a team leader on a group project, and it really showed me how much I enjoyed being in a leadership role. I think this job would be a great way to help me take the skills I have now and use them to grow and develop in a new role.

Potential Question:

Tell me about a difficult challenge you faced.

*One of my more difficult challenges was getting my CFA while maintaining and balancing my workload. So, before the tests, I read Carson Tate's book *Work Simply*. The book helped me define my "productivity style." Since I was on my firm's leadership council, I took the book to our CEO. He liked it so much that he bought a copy for the rest of the sales team.*

In these examples, the candidate reverted to her talking points. When talking about what motivates her, she gives an example of being a "constant learner." She humbly credits others and highlights that she has been in the top 10% of sales.

When asked about the most difficult challenge she has faced, she again cites her continuing education efforts while stating the impact those efforts had on the sales team and leadership council.

It's vital to notice that the candidate mentioned a couple of books she had read in both examples. So, before your interview, make sure you have a book in mind that has influenced your business or your career.

Navigating Illegal Questions.

There is a good chance that you will be asked one or more of the following questions in a seemingly harmless or casual manner. While being aware of them is the first step, dealing with them is the most important. **You have four options: Answer the question, ignore the question, refuse the question, or address the underlying issue.**

Answer the Question: This is your right and may be appropriate depending on the situation; however, you should be aware that you are providing irrelevant information. You may also be giving the wrong answer, harming your chances of being hired.

Ignore the Question: Sometimes, invading or changing the subject is possible. However, this tactic may generate more questions in many minds because of your apparent inability to express discomfort in answering the question.

Refuse the question: This can be risky as you may offend the interviewer. However, you may consider whether you are comfortable working with this individual. It might be a more appropriate response to ask how this question is relevant to the job.

Address the Underlying Issue: You can quickly identify the underlying concern. Therefore, responding to that question rather than the one specifically asked would be prudent. For example, an interviewer who asks, "What country are you from?" may wish to know if you are authorized to work in the United States (or another country relevant to the job). In that case, you may respond: "I am authorized to work in the United States." But, again, the risk lies in correctly identifying the underlying problem.



Impress the hiring manager while proving you did your homework.



Here's an example of a candidate who did their research:

Mr. Smith,

I wanted to begin by thanking you for taking the time to speak with me. I am sure you are interviewing several highly qualified candidates for this role and I greatly appreciate your time and attention.

In preparation for the interview, I found a speech your CEO Roger Sullivan gave at the Financial Planners of America Conference. I noticed he talked a lot about your firm's new actively managed ETF products. I am a strong believer in active management and I have had a lot of success selling similar products. Your new product offering is one of the main reasons I am interested in this role. Can you tell me more about these products?

Parker

The candidate spoke intelligently about the firm's products and services and asked specific questions, proving she is a serious candidate.

Doing your homework means researching the company's products, services, and people, then using that information to ask intelligent questions.

Think about your hiring manager's mindset. You already made it through their screening process, so it's reasonable to assume that the hiring manager sees you as qualified—and your ability to perform the job is not necessarily in question. What is in question is your ability to perform that job as they see fit. How do you show them that you're up to the task? You ask smart questions.

Asking thoughtful questions proves you are a serious prospect and allows you to discover what the hiring manager seeks. What is it that they need to survive? What is the problem they are trying to fix? Identifying the problem allows you to set the hook and pique their curiosity. Piquing the hiring manager's curiosity is the first theme you must address in the interview.

Find the problem and pique the hiring manager's curiosity!

Every hiring manager loves to talk about their firm, successes, and philosophy. Break the ice by expressing gratitude and complimenting the hiring manager to gather their thoughts and opinions. Work towards building a sense of empathy and listening with the intent to understand, not with the intent to respond.

Think of yourself as a pro football player interviewing with a new team. Try to understand the coach's game plan, culture, goals, and objectives, then draw a connection between them and your own past experience. Prove that you understand what the coach is trying to achieve and cite examples of how you not only performed but excelled at playing in a similar style of offense.

Here are a few examples of some smart questions you can ask:

- Where have you seen people struggle in this particular role?
- You have an outstanding product offering, but what are the biggest challenges you and the firm currently face?
- Can you tell me more about the company culture?
- I researched your LinkedIn profile page and noticed you have been at the firm for almost a year. What do you enjoy most about working for this company, and how is it different from the previous firm where you were employed?
- Can you tell me about how the organization operates from a team perspective?



ACTIVITY 3.1

TIME: 30+ MINUTES (SELF-DIRECTED)

Part 1. Review and reflect on your personal and career value exercises. Craft a question you could ask an interviewer for your top 5 career values.

Part 2. Review and reflect on your Gallup Clifton Strengths results. Craft a question you could ask an interviewer for each of your Top 5 Gallup Strengths.

Be prepared to review your questions with your coach.

Questions to Ask About the Job

First, make sure you have a handle on precisely what the job's day-to-day responsibilities will be—both now and in the future.

- What does a typical day look like?
- What are the most immediate projects that need to be addressed?
- Can you show me examples of projects I would be working on?
- What types of skills is the team missing that you are looking to fill with a new hire?
- What are the biggest challenges that someone in this position would face?
- What sort of budget would I be working with?
- Is this a new role that has been created?
- Do you expect this position's primary responsibilities to change in the next six months to a year?

Questions to Ask About Training and Professional Development

Think of each new job as the next step on your path to career success. Will this position help you get there?

- How will I be trained?
- What training programs are available to your employees?
- Would I be able to represent the company at industry conferences?
- Where is the last person who held this job moving on to?
- Where have successful employees previously in this position progressed to?

Questions to Ask About Your Performance

Understanding how your potential new manager will measure your success is key to understanding the company's priorities and managerial style.

- What are the most important things you would like to see someone accomplish in the first 30, 60, and 90 days on the job?
- What are the performance expectations of this position over the first 12 months?
- What is the performance review process like here? How often would I be formally reviewed?
- What metrics or goals will my performance be evaluated against?

Questions to Ask About the Interviewer

Asking questions of the interviewer shows that you are interested in them as a person—and that is a great way to build rapport.

- How long have you been with the company?
- Has your role changed since you have been here?
- What did you do before this?
- Why did you come to this company?
- What is your favorite part about working here?

Questions to Ask About the Company

Why not learn a bit of where you might work.

Because a job is not just about your day-to-day to-do list.

- I have read about the company's founding, but can you tell me more about _____?
- Where do you see this company in the next few years?
- What can you tell me about your new products or plans for growth?
- What are the short-term and long-term company goals, and how does this team support hitting those goals?
- What gets you most excited about the company's future?

Questions to Ask About the Team

The people you work with day in and day out can

make or break your work life. Ask some questions to uncover whether it's the right team for you.

- Can you tell me about the team I would be working with?
- Who will I work with most closely?
- Whom will I report to directly?
- Can you tell me about my direct reports? What are their strengths and the team's most significant challenges?
- Do you expect to hire more people in this department in the next six months?
- Which other departments work most closely with this one?
- What are the common career paths in this department?

Questions to Ask About the Culture

Is the office buttoned-up conservative or a fly-by-the-seat-of-your-pants kind of place? Learn the subtle but oh-so-important aspects of company culture.

- What are the company and team culture like?
- How would you describe the work environment here—is the work typically collaborative or more independent?
- Can you tell me about the last team event you did together?
- What is your favorite office tradition?
- What do you and the team usually do for lunch?
- Does anyone on the team hang out outside the office?
- Do you ever do joint events with other companies or departments?
- What is different about working here than anywhere else you have worked?
- How has the company changed since you joined?

Questions to Ask About Next Steps

Before you leave, make sure the interviewer has all of the information they need and that you are clear on the next steps by asking these questions.

- What are the next steps in the interview process?
- Is there anything else I can provide you with that would be helpful?
- Can I answer any final questions for you?

Candidate Evaluation Form

Candidate Name: _____ Position: _____
Interviewer Name: _____ Date: _____

Scoring

Candidate evaluation forms are to be completed by the interviewer to rank the candidate's overall qualifications for the position to which they have applied. Under each heading, the interviewer should give the candidate a numerical rating and write specific job-related comments in the space provided. The numerical rating system is based on the following:

5 - Exceptional 4 - Above Average 3 - Average 2 - Below Average 1 - Unsatisfactory

Catagories	Rating				
	5	4	3	2	1
Educational Background: Does the candidate have the appropriate educational qualifications or training for this position? Comments:					
Prior Work Experience: Has the candidate acquired similar skills or qualifications through past work experiences? Comments:					
Technical Qualifications/Experience: Does the candidate have the technical skills necessary for this position? Comments:					
Verbal Communication: Did the candidate demonstrate effective communication skills during the interview? Comments:					
Candidate Enthusiasm: Did the candidate show enthusiasm for the position and the company? Comments:					
Knowledge of Company: Did the candidate show evidence of having researched the company prior to the interview? Comments:					
Teambuilding/Interpersonal Skills: Did the candidate demonstrate, through his or her answers, good teambuilding/interpersonal skills? Comments:					
Initiative: Did the candidate demonstrate, through his or her answers, a high degree of initiative? Comments:					
Time Management: Did the candidate demonstrate, through his or her answers, good time management skills? Comments:					
Customer Service: Did the candidate demonstrate, through his or her answers, a high level of customer service skills/abilities? Comments:					
Overall Impression and Recommendation: Final comments and recommendations for proceeding with the candidate. Comments:					

Get the hiring manager to give you the game plan.

As the hiring manager begins to tell you how they run their business and begins to paint a picture of their ideal candidate, humbly respond by giving examples of how you have had success working in a similar role. Doing so allows you to implement a simple yet effective persuasion technique. You are, in effect, “selling past the sale.” If done correctly, the hiring manager will start to envision you not only in the role but also performing the job like their top employees. In doing so, you will have successfully piqued their interest.

Another simple persuasion technique to pique the hiring manager’s interest is to create a shared sense of experience to create commonality. A good illustration of this technique would be the “My Pillow” ads we all know and love. Mike Lindell, the CEO of My Pillow, has gotten many people to buy his product because he starts his sales pitch by talking about uncomfortable flat pillows. In doing so, he draws an immediate connection between himself and what we customers have all experienced. After relating to his customers with a shared experience, the very likable Mike Lindell shows us how “My Pillow” is the solution and makes life better. You, too, should be able to prove to the hiring manager that life will be better once you are hired.



Show the hiring manager life will be better when you get hired.

When Oprah Winfrey aired her final episode, she made an interesting comment. “I’ve talked to nearly 30,000 people on this show, and all 30,000 had one thing in common: they all wanted validation. If I could reach through this television and sit on your sofa or sit on a stool in your kitchen right now, I would tell you that everyone you will ever meet shares that common desire. They want to know: ‘Do you see me? Do you hear me? Does what I say mean anything to you?’”

Throughout the interview, it’s imperative that you tactfully make the hiring

managers feel “validated.” Be like Oprah and let the hiring manager know you understand them and agree with their goals and objectives. Compliment them on their strategy and business plan. Express gratitude to them for taking the time to share that information with you.



Mr. Smith,

Thank you for giving me an overview of your business, goals, and objectives. I studied the LinkedIn profiles of your sales representatives before our call. It seems your top sales executives all have a few things in common. Seventy-five percent have high-level designations and accreditations. Each has a minimum of eight years of field experience, and most were recruited from your top competitors.

Over the last four years, I took courses at night and on weekends to get my current accreditations, including the Series 7, CFA, and CIMA designations. I have over ten years of field sales experience and have worked for what could be considered one of your top competitors.

I also reviewed your firm's product offerings, and I specifically like the firm's new “target-date funds.” I asked some of my current clients to review these funds. We were all in agreement that retirees need this product in their portfolios. The time to own this product is now. You mentioned that your former sales rep did \$8 million in sales within this territory. I closed over \$9 million in sales last year.

Your position interests me because your products will help my customers, and the territory you assigned allows me to expand my client base. I would like to pursue a face-to-face meeting and learn more about your team, your products, and the organization.

The candidate illustrated her commitment to the business by mentioning that she took courses at night and on weekends to get industry designations. She drew a connection between her background and the hiring manager's existing team, highlighting her success. She makes a powerful statement, mixing empathy with authority.

Validate the hiring manager and their strategy.

The candidate also addresses the question lurking in the back of the hiring manager's mind: Why does this executive want this position? Again, it is critical to let the hiring manager know your motivations.

It's also worth noting that the candidate's statement was impactful and clearly showed she knew her business and could present value. By doing this, the candidate has completed the second theme of "enlightening" the hiring manager. She proved how she could make an impact, thus satisfying the hiring manager's survival needs and fixing their problem.

Let the hiring manager know why you want the position.

We must highlight that the candidate's statement was brief. Imagine for a moment that you're forced to go on a blind date at a salty Hibachi restaurant, and all your date wants to do is talk about their ex: how mean he or she was and how they or how they had a bad case of halitosis. This is what it feels like to interview a candidate who complains or never stops talking. Every hiring manager has experienced this nightmare. In short, keep it short. Candidates who complain and talk too much get eliminated.

Don't be the candidate who talks too much.

The final step and theme you must address are to close and get a commitment. As you end the interview, ensure the hiring manager understands your interests and intentions. Do not be ambivalent. Make your intentions obvious. Close the interview with a brief and powerful statement... I like to call this the Mike Tyson knockout punch!

Mr. Smith,

Is there anything we have not covered in this conversation that would prohibit me from moving forward? If there is something in the back of your mind or something we have not discussed, please let's discuss that issue now because I would like to move forward.

Parker



Close the interview with the Mike Tyson knockout punch.

Asking this question forces the hiring manager to let you know where you stand and puts them in a position where they must commit. How do you know if you had a successful interview? If you have been successful, the hiring manager will ask you to proceed forward by either requesting to speak with you again or requesting that you speak with one of their counterparts.

Please don't worry if you do not move forward in the process. The initial interview is a lot like the NFL combine. For those unfamiliar, combine is where *elite* college athletes come to display their skills for NFL teams. Notice I said the word "elite." If you made it to the first interview, you, too, are "elite." Just because you were not chosen does not mean you did anything wrong. It simply means the team found a prospect that suits their needs better.

Closing Checklist.

- Clarify the next steps in the process
- Request business cards (and leave yours)
- Thank them and shake hands

After Action Checklist.

- Recap the interview and make notes
- Celebrate your interview
- Prepare and send thank you letters
- Follow-up (optional)
- Send a "Thank you for not hiring me" letter if you find out you did not get the job.

Reasons you may not advance in the interview process

- You don't look the part
- You lack focus
- You come on too strong, weak, or negative
- You know the right "fit" for the culture
- You were not prepared for the interview
- You're not fully qualified or skilled



The Waiting Game.

Sometimes, waiting to hear back from the hiring manager is more stressful than the interview process. In many cases, the time between the interview and the decision can be longer than anticipated, making this period even more uncomfortable. However, even though you cannot speed up the process, you can **do the following three things** while you wait to hear back about the job offer.

Keep searching for jobs and going on interviews.

Most job seekers get excited when they land an interview that fits all their needs. Unfortunately, the courtship with that potential employer is just beginning, and the interview is typically scheduled several days later. Job seekers commonly stop their active career networking campaign after a great interview. And why not? This is the job they want, so why continue? This pause is one of job seekers' biggest mistakes and is why it can take nine months to find a job.

You must have a signed contract in your hands before everything is finalized. Even if you walk out of an interview with the hiring manager telling you, the job is yours. By continuing your search, you're ensuring that you still have options, and if you end up not getting the job, you haven't lost any precious time.

If you're offered interviews, take them. But make sure they still put the same effort and energy into those interviews. It can be easy to fall into the trap of thinking it's just a backup interview or Plan B.

Slow down on the follow-up.

After you've sent your initial follow-up message to the hiring manager, don't keep contacting them. Nothing annoys a hiring manager more than a 'just checking in' email sent before the date they've said a decision would be made. The same goes for an 'I'm still very interested in this position email. They know you're interested and eager for a decision – but your emails aren't speeding up the process, so give the hiring manager a break.

You can and should reach out a few days after the date the decision was supposed to be made has passed. What you want to find out now is how much longer you'll have to wait. But, of course, you're only emailing them to ask when a decision will be made, so it's obvious you still want it, and stating that directly can come across as desperate and, quite frankly, redundant.

Be Patient.

You've done everything possible, and now the process is out of your hands. So when you feel like you're getting impatient, remind yourself of that. Of course, patience is easier said than done, but you must try your hardest not to become anxious and stressed during the waiting period. All that will do is make the waiting even more difficult. If you get the job offer, excellent! If you don't, you won't lose time or momentum, and your job search will continue.

How to Remove yourself from Job Interview Process

There's a way to tell a company "no" and still get your desired job. Job interviews aren't just an opportunity for employers to determine whether you're a good match for them. They're also your chance to determine whether the role is a good fit for you.

When the answer becomes clear, "no," you can tell the hiring manager that and back out, or you can see it as another networking opportunity. However, particularly if you like the company involved, you will want to maintain the relationships, so they think of you first when a role you like comes around.

Don't drop out right before an interview if you can help it.

Once you have decided a role is not suitable for you, it is essential to let the hiring manager or recruiter know as soon as possible so it's not an inconvenient surprise. Unless something urgent comes up, backing out less than a day before you are supposed to have a job interview comes off as unprofessional. It is very inconvenient and could leave a bad taste in the employer's mouth because the interview panel has blocked off their schedule, which is time wasted on their side.

In your rejection, mention which roles are a better fit for you.

Thank the hiring manager for their time, connect with them or their company on LinkedIn if you still need to, and note what role you are looking for. If you want more of a leadership role, for example, you could say something like:

Dear Mr. Smith:

After carefully considering the position, I've decided that this role is not the right fit. The biggest factor in my decision to withdraw my candidacy was my desire to step into a role with greater leadership responsibilities.

Thank you so much for your time and support during the interview process. I greatly admire 'Company Name' and would enjoy working for your company in a position more aligned with my strengths and career goals. If I can help you in any way in your search, please don't hesitate to reach out.

Best,

Parker Smith

If one of the reasons you are backing out is compensation, you can be direct about your rationale with language such as, "These are the types of bills and loans and financial constraints that I need to make work. If there is a role with a higher compensation package that could help me..."

Offer a referral to soften the blow.

One way to maintain a positive relationship? Offer the employer a different candidate you trust for the role. It shows this is a company you are willing to recommend friends and colleagues work for, and it helps the recruiter.

You could share the referral offer after you let them know you are declining, with language like, "I wanted to recommend 'Name' for the position. I worked with her at 'Previous Company' for ten years. She has the experience you seek and is looking for a role like this one. I would be happy to share her contact information if you are interested in connecting with her."

If you can, do this all over the phone.

A rejection email is fine if you have not completed the phone screen stage. But for candidates who have done interviews, taking the time to call the hiring manager and tell them directly about your decision is a much more thoughtful approach. Phone calls stand out because hiring managers are constantly receiving emails.

It sets the candidate apart a little more. It also helps the employer see how genuine that candidate is being. Finally, it also allows the employer to ask clarifying questions that could set the candidate up for success in a future recruiting process.

After you back out, check in to show that you are still genuinely interested in the company.

To maintain a relationship with a company you want to join in the future, save interviewers' emails, or connect with them on LinkedIn, so you can send occasional messages that show you are still following the organization.

In your messages, you can bring up points of commonality or the latest news about the company, like "Hey, I just saw this article that reminded me of something we talked about," or "Wow, I saw the company increased the revenue by \$10,000, as a few examples.

The goal is for your check-in to be a reminder about your interest. You will be fresh in the recruiter or hiring manager's mind when a role does open up.