

PHONE SCREEN FUNDAMENTALS

Prepared by The Executive Group



KEY POINTS

- No more than 8 to 10 questions
- No more than 20 to 30 minutes
- Prepare them for what to expect
- Explain the process
- Give a time-frame for the process

- In the initial call to pre-screen qualifications, use a random call approach vs. a pre-arranged appointment call approach if possible. This provides a view of the individual's phone presence and their ability to handle themselves on the spur of the moment.

- Never follow the candidate's resume. This makes it too easy for the applicant to recite roles and responsibilities.

QUESTIONS

- 1) If unknown, how did the applicant hear about the position?
- 2) What does the candidate know about the company and the position?
This shows the research done about the company and uncovers the thoroughness, thoughts and questions the candidate may have.
- 3) Why is the candidate leaving the current employer and what is driving the decision to leave? What is the individual looking for in the next role?
- 4) What kind of training and experience does the applicant have to prepare for this kind of role?
- 5) Ask the applicant to give 2-3 main statements about the job and performance expectations. Also ask how the individual's experience falls in line with what has been described. Keep it short and sweet, control the conversation, and don't let the applicant ramble or wander. Keep the candidate focused – no turning back the conversation and asking questions of you.
- 6) Is the candidate willing to relocate (if applicable)? Is there a desire to work from home?



7) Ask what the applicant's earning objective is and how it compares to the current compensation. Don't ask for a specific amount. Do not let the individual answer with "money is not what I am concerned about, I am looking for stability (or whatever the reason)." Re-ask the question to determine current and desired earnings.

8) Disclose to the candidate that your company's process is time-consuming and extensive. *"Our goal is to hire the right people in the right positions for the right opportunity."* Then tell them what to expect. Ask if the applicant has a timeframe for this change of jobs and whether the current employer is aware that the candidate is looking. This answers the questions: is this individual serious or tire-kicking? Is the information being used as leverage with the current employer to increase wages? Is there a layoff coming?

9) Disclose to the candidate any job-specific screening that is part of your company hiring policy. For example, say "Our clients have certain restrictions due to sensitive financial information we work with. I need to know if you've ever been convicted of a felony or had a DUI." If the answer is yes, explain that at this time you apologize but cannot move forward in the process (if applicable).

