Conducting Successful Interviews

The interview is an opportunity for the organization and the candidate to get to know one another, so it is imperative to prepare well.

You should start preparing during the resume screening process by creating a list of three to five questions you will ask of each candidate that speak to the specific needs of the role and/or organization. This will help establish an apples-to-apples comparison across important requirements. However, also recognize that the best interviews are conversational information exchanges and candidates likely will have unique backgrounds and talents you'll want to discuss.

There are a number of things your organization can do to engage in a successful interview process.

Preparing for the interview:

- **Decide what type of interview process is right for this job and who should interview the candidates.** Depending on the level of the position, you may determine that a multistep process is appropriate. For example, round one might be a telephone interview, round two an in-person interview, and round three a presentation made by the candidate to multiple members of the hiring team. It's important to be clear, in advance, about what you want to learn during each interview round. A phone interview is often best for discussing threshold skills (scope/scale of management experience, budget size managed, program content, etc.) In-person interviews go deeper and ascertain fit with your organization, workstyle, etc.
- **Inform candidates well in advance** about the interview process and times, type of interviews to be conducted, location and length of interviews, and the team members with whom they will be interviewing.
- **Establish a point person for the process.** Assign an HR person or hiring manager to receive feedback from candidates during the process and to answer any questions they might have**.**
- **Create consistency across candidate interviews.** It is important for each candidate to be interviewed by the same individuals within the hiring organization. At the same time, remember that each candidate has a set

of unique experiences, strengths, and weaknesses—allow for opportunities to probe more deeply in different areas for each candidate.

- **Discuss compensation at the appropriate time.** It's important to establish realistic expectations regarding compensation at the outset of an interview process. You want to ensure that, should a candidate become a finalist, your organization can make an attractive offer. You may want to ask candidates who have advanced through a phone screen for a general sense of their expectations around compensation for the position and/or any deal-breakers related to compensation. This is to ensure, early in the process, that the candidate and the organization are aligned in their thinking on compensation ranges for the position.
- **Let the candidates know what to expect in terms of timeframe and next steps in the process.**

Conducting the interview:

- **Create a comfortable atmosphere for the candidate.** Depending on each candidate's knowledge of the organization, the interviewer can provide a short history and describe his/her role in the organization before the interview.
- **Ask open-ended questions.** To draw out significant information from candidates, ask questions that are "open-ended," allowing each candidate to express ideas and explain his or her experience and work style. For example, "what is important to you in a workplace?" instead of, "do you like structure in a workplace?" Or, "tell me about a time you led a cross-functional team" instead of, "have you ever led a cross-functional team?" Also ask questions that can reveal how a candidate might behave in a particular situation. For example, "have you ever had to resolve a conflict between staff members? If so, how did you approach the situation?" Also ask for the candidate's opinion of what he or she doesn't like, e.g., "what is your greatest pet peeve in the workplace?"
- **Interview for results and for examples.** When asking questions, focus on the results the candidate may have achieved. For example, if you are hiring a COO and managing budgets is a key responsibility for the position, instead of asking, "have you managed budgets before?" ask, "what was one of the challenges you encountered when managing budgets in your current (or prior role)?" Then ask, "tell me about one accomplishment in financial management of which you're especially proud."
- **Probe for ability to manage and work in teams.** If the new hire will be required to work with teams domestically or internationally then you might ask, "tell me about an example of your work with international or remote teams. How did you manage a group or team remotely?"
- **Steer clear of personal, private, and discriminatory questions.** The following areas are among those legally off-limits in interviews: age, citizenship (although you can ask if an individual is authorized to work in the United States), race/ethnicity, disability, gender, health issues, marital status, national origin, personal finances, family information, religion, veteran status, military service, sexual

orientation, gender identity, and pregnancy. In addition, do not make hiring decisions based on any of these protected characteristics. Make sure to avoid these areas even in informal conversation with candidates. If a candidate voluntarily discloses information in any of these areas, do not pursue the topic. If you do ask any of these questions, you could be leaving your organization open to future litigation, whether or not you hire the candidate. (See "Legal and Illegal Interview Questions" for more details.)

- **Listen to how a candidate answers your questions.** While asking the right question is important, listening to what is and is not said is even more critical to assessing the candidate. Think ahead about "good answers" to your questions, but be flexible and open to answers you have not considered. Once you have listened to a candidate's answers, if there are comments that raise questions, make sure to probe further. Also, for future reference in the review and decision-making process, keep notes as to what was asked and answered.
- **Probe carefully for a candidate moving into the nonprofit sector for the first time or making significant intra-sector transitions.** Many individuals with significant experience in the government or for-profit sector are interested in "bridging" to the nonprofit world in order to connect their skills and experiences to missions they're passionate about. Ask questions that give these candidates an opportunity to explain how their skills and passions translate from one role or sector to another. Ask direct questions about whether the candidates have had volunteer experience, and if nothing is on the resume, be sure to be specific, asking about town boards, schools, and religious organizations, as well as general volunteering in other nonprofits—these are often overlooked by individuals moving into the sector for the first time.
- **Encourage the candidate to ask questions.** Remember that this is a two-way process, and that candidates may have questions about the role and the organization to help them assess fit. Keep this portion to about a quarter of your time during a one-hour interview and pay attention to the quality of questions, as it can tell you a lot about a candidate.

Evaluating the candidate post interview:

- **Assess each candidate for cultural fit.** Assessing for fit with your culture can be challenging; however, when hiring for senior management positions, fit is incredibly important. Understandably, an organization's culture is not easy to define. There are some questions, however, that you can ask yourself after interviewing someone to help you assess a candidate's fit, such as:
  - Does the candidate share the same values as our organization?
  - Can I imagine the candidate working effectively with our team?
  - Would I be able to work with this person?
- **Avoid going overboard on the perfect fit,** as balancing cultural fit with the goal of building a team with a diverse set of backgrounds, experiences, ideas, and working styles is critical.
- **Update assessment grids for all active candidates.**

When Internal Candidates Are Part of the Process

Many searches include a mix of internal and external candidates. Though the same principles apply to both types of candidates, there are several best practices that apply specifically to a process that includes internal candidates.

Recruiting from the outside can be riskier than promoting from within, and giving emerging leaders the opportunity to advance internally is important, so if appropriate your process should encourage internal candidates and give them a fair shake. However, because of the potential internal impact of not choosing an internal candidate, you need to be very careful in setting expectations and must be crystal clear about the role and criteria from the beginning.

For internal candidates, it is nice to say up front that you are excited that they have applied and that the organization does not want to lose them, regardless of the outcome of the search. It can be very helpful to explain why the organization is searching for external candidates at all, and to be very clear in articulating the process, timing, and specific criteria. Always avoid implicit or explicit promises about the outcomes of the process.

On the flip side, employers sometimes do less due diligence on internal candidates than external ones, assuming that they know enough already about a person who has worked for them for years. However, it is important not to skip steps in the process. Do set up interviews, and do conduct internal reference checks. The checks you conducted when hiring the employee likely focused on a different set of roles and responsibilities than those encompassed by the new role. Also remember that the person has likely grown and developed since the time he or she left his or her previous employer, so take the external references in context.

A Note on Confidentiality

A key area of concern for both hiring organizations and candidates is confidentiality, which can become an issue when a candidate or potential recruiting target works for another organization in the field and/or doesn't want the current employer to know that he or she is considering a change, or when the hiring organization itself is not ready to let the public know that they are conducting a search. There are a number of ways to protect a candidate's identity. For example, you might designate a single contact person for that candidate, and use "Candidate X" in all verbal and written descriptions of this person even with the search committee. You can password-protect key documents, such as resumes and other hiring-related documents. If others (e.g., sources you have called) mention an existing candidate as a referral, you should say "thank you for the referral" without indicating that you have already been in touch, and be careful about probing for any more detail on one referral versus the others. Finally, always ask the candidates for the best way to reach them (e.g., phone or email, cell versus landline) and whether voicemail and email are confidential.

While you do want to let candidates know things such as expected timing of a decision and where they are in the process, in most cases you should not share names of other candidates. For some organizations, this is extremely important and impacts the hiring process and logistics as well. For example, when bringing in candidates for a day of interviews with key hiring team members, you may need to be careful to avoid having candidates bump into one another in hallways or reception areas, which you can do by staggering start and end times of interviews, or having each candidate stay in one room while the interviewers rotate rooms over the course of the day.

In addition, as part of the interview process for senior-level roles, you may share some organizational information that you would like candidates to keep confidential. If the organization is sharing confidential or proprietary information, it is important to get a non-disclosure agreement signed before doing so. The agreement can be simple and short, but it is a best practice to put confidentiality obligations in writing.

THE BRIDGESPAN GROUP
BOSTON 2 Copley Place, 7th Floor, Suite 3700B, Boston, MA 02116 USA. Tel: +1 617 572 2833
NEW YORK 112 West 34th St., Ste. 1510, New York, NY 10120 USA. Tel: +1 646 562 8900
SAN FRANCISCO 465 California St., 11th Floor, San Francisco, CA 94104 USA. Tel: +1 415 627 1100
MUMBAI Bridgespan India Private Limited Company, 1086, Regus, Level 1, Trade Centre, Bandra Kurla Complex, Bandra East, Mumbai, 400051 Maharashtra, India. Tel: +91 2266289639

www.bridgespan.org contact@bridgespan.org