HireUP!

Our Approach to Talent Acquisition

ASPIRE LEADERSHIP DEVELOPMENT

Participant Guide

> **"** People are not your most important asset. The right people are.
>
> *Jim Collins*

Welcome to HireUP!

The **objective** of **HireUP** is to prepare you to effectively select best-in-class, extraordinary talent who will excel in their role within Cotality and help us perform now and transform for the future.

This course will focus on:

❑ Reinforcing Cotality's approach to Talent Acquisition

❑ Exploring guidelines, best practices, and resources to leverage before, during, and after interviews

❑ Practicing interviewing and evaluating candidates, and receiving feedback

For more information about Talent Acquisition and Cotality's approach, check out our site on myCotality **HERE**, and a corresponding e-learning course **HERE**.

This guide is designed to support you during this session and be used as a reference afterward.

Contents include:

- Cotality's Approach to Talent Acquisition
- Interviewing
  - Preparing
  - Conducting
  - Evaluating
- Cotality Interview Guide

EXERCISE: Warm Up

Consider the following, considering your personal experience:

1. What is the impact of an extraordinary hire?

2. What gets in the way of an extraordinary hire?

Our Approach to Talent Acquisition

Select the best candidate based on a representative pool of best-in-class talent.

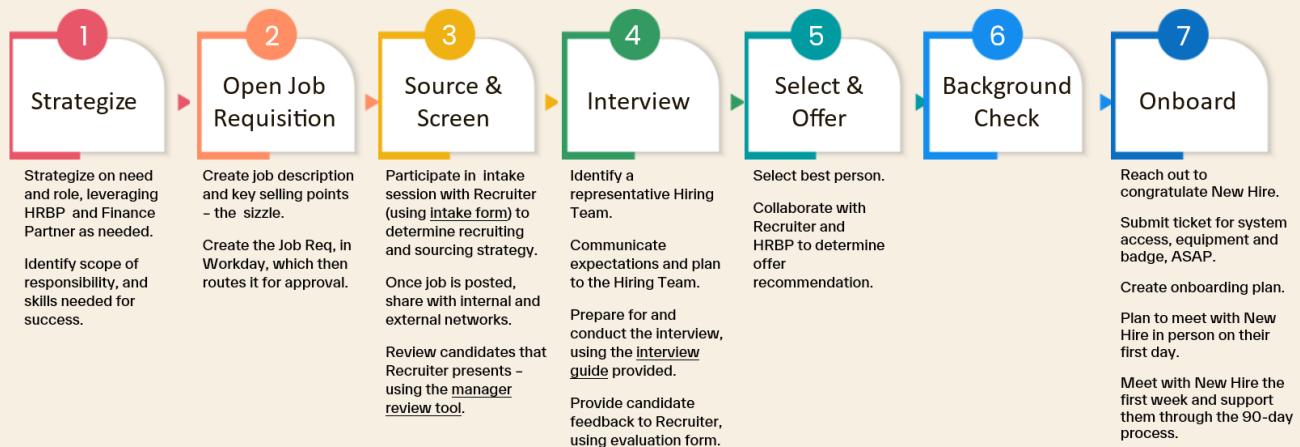**Attract** an inclusive pool of best-in-class talent.

Assess talent using a purposeful and uniform approach, ensuring alignment with our values and transformational skills needed for the future.

Drive an extraordinary **candidate experience** that showcases our employer brand.

The **Hiring Leader** is responsible for selecting the best candidate for the role, following the Cotality process.

1 Strategize	2 Open Job Requisition	3 Source & Screen	4 Interview	5 Select & Offer	6 Background Check	7 Onboard
Strategize on need and role, leveraging HRBP and Finance Partner as needed. Identify scope of responsibility, and skills needed for success.	Create job description and key selling points – the sizzle. Create the Job Req, in Workday, which then routes it for approval.	Participate in intake session with Recruiter (using intake form) to determine recruiting and sourcing strategy. Once job is posted, share with internal and external networks. Review candidates that Recruiter presents – using the manager review tool.	Identify a representative Hiring Team. Communicate expectations and plan to the Hiring Team. Prepare for and conduct the interview, using the interview guide provided. Provide candidate feedback to Recruiter, using evaluation form.	Select best person. Collaborate with Recruiter and HRBP to determine offer recommendation.		Reach out to congratulate New Hire. Submit ticket for system access, equipment and badge, ASAP. Create onboarding plan. Plan to meet with New Hire in person on their first day. Meet with New Hire the first week and support them through the 90-day process.

NOTES

Interviewing

It's **critical** to use a structured, behavioral-based interview process based on job-relevant criteria

Our Values, With Aligned Competencies for All Employees

1. Be yourself.

Come as you are, be true to yourself and bring original ideas. We are stronger because of our differences and the unique experiences each of us brings. We value individuality, diversity, inclusiveness, and equity.

All Employee Competencies
- Courage
- Self-Development

Leadership Competencies
- Drives vision & Purpose

2. Lift people up.

Operate with empathy and integrity. When we put people first, we build better relationships, trust, and resiliency. In turn, this sustains stronger communities.

All Employee Competencies
- Collaborates
- Situational Adaptability

Leadership Competencies
- Builds Effective Teams

3. Make an impact.

Take personal initiative, own the results, learn from mistakes, and always look to improve. When we commit to improve something everyday, we positively impact individuals, businesses, and society.

All Employee Competencies
- Ensures Accountability
- Manages Complexity

Leadership Competencies
- Drives Results

4. Clients first.

Clients are our North Star. We strive to know their businesses as well as our own. We co-create and collaborate to grow businesses and relationships. When that happens, we all win.

All Employee Competencies
- Customer Focus
- Business Insight

Leadership Competencies
- Balances Stakeholders

5. Innovate, always.

See the bigger picture. Be bold, think big, and ask 'what if'. We value brave ideas and insight that exponentially unlock new possibilities to better serve people throughout the property ecosystem.

All Employee Competencies
- Optimizes Work Process
- Tech Savvy

Leadership Competencies
- Cultivates Innovation

6. Set the pace.

Operate with speed, agility, and purpose. We are the heartbeat of the property market, dynamically adapting and evolving the way the industry works for the better. We value the clarity, focus and energy it takes to be the industry leader.

All Employee Competencies
- Action Oriented
- Decision Quality

Leadership Competencies
- Strategic Mindset

cotality

Prepare   Conduct Interview   Evaluate

NOTES

Interview Process

| Introduction & Opening Questions | Job Specific Questions | Core Values & Aligned Competency Questions | Candidate Questions, Closing & Next Steps |

Introduce yourself, share your description of the role

Ask introduction questions to build rapport with the candidate.

Examples: What interests you about this role? What is your superpower? Briefly walk me through your resume.

Be careful here to ensure you **don't** slip into illegal questions. E.g.,

1.   Where do you live?
2.   Do you have children?
3.   What country are you from originally?

Focus on job relevant questions.

NOTES

Interview Process

| Introduction & Opening Questions | Job Specific Questions | Core Values & Aligned Competency Questions | Candidate Questions, Closing & Next Steps |

Focus: Ensure candidate has the functional and technical knowledge, skills, and ability needed to be successful in the role.

Sample Question: Tell me about a time you demonstrated *<insert specific job expectation/ character skill that aligns strongly with the role>* to solve a problem you were faced with at work.

Exercises. Some roles may require you to incorporate role playing or technical exercises. Connect with the hiring leader to understand their expectations for your interview.

• Example – coding, role play for customer service

NOTES

Prepare: Map Your Interview Plan

❑ **Hiring Leader: Pick your interview team**

- Select a representative interview team. Think about pulling in stakeholders from other teams with whom they will work to fully represent Cotality.

- If a senior leadership role, consider including your HRBP.

- Different roles may require different amounts of interviewers – e.g., basic roles have 1-2 interviews; more complex roles may require 3-5 interviews.

- Consider pairing up interviewers.

NOTES

Prepare: Map Your Interview Plan

❑ **Hiring Leader: Create a well-structured interview schedule**

• Decide the number of interviewers and rounds.

• Strategically determine which interviewers will be involved in which stage of the process.

• Allocate criteria to each interviewer (e.g., technical skills, competencies)

• Make decision on how long each interview will take, considering typical flow for an hour-long interview.

| Introduction & Opening Questions | Job Specific Questions | Core Values & Aligned Competency Questions | Candidate Questions, Closing & Next Steps |

NOTES

Prepare: Map Your Interview Plan

❑ **Hiring Leader:** **Communicate with your interview team**

- **Invite interviewers** to participate.

- **Share your interview plan with each interviewer** (e.g., schedule, team, who/how decisions will be made).

- **Assign what skills/competencies** each interviewer should target so there's no overlap in questions.

- **Discuss the expectations of each interviewer** (evaluating, how to share feedback to avoid group think)

NOTES

Interviewing: Prepare

❑ **All Interviewers:** **Select questions, based on criteria assigned**

- Create 5-10 questions per interview to ask your candidate. Choosing the right interview questions is pivotal, as it shapes the depth and quality of insights gained from candidates – ensuring a more insightful and informed hiring process.

- Pre-screen the resume before the interview and highlight areas you want to dig into.

- Create your own questions tailored to the specific needs of your interview or discussion. The sample questions provided serve as a helpful guide.

NOTES

EXERCISE: Prepare - Create Your Interview Plan

Complete an interview plan using the job description provided. Make assumptions as needed.

1. How can you tweak the job description to make is sizzle?

2. Who will interview and why?

3. What criteria/competencies are important? How will you allocate the criteria to your interviews?

4. How will you "schedule" the process (rounds, length of interviews)?

Interviewing: Conducting

Key Principles

- Past behavior is a strong predictor of future behavior / performance in similar situations

- Learning agility - the ability to learn from experiences and apply those learnings to new changes - is a clear indicator of the potential to perform and grow

Situation or **T**ask

Action(s) of the <u>individual</u>

Results of their Action

Take Aways or Learning

Watch-Outs

Thinking about STAR-T, what do you need to watch out for from candidates?

- Being general and not providing a specific example

- Sharing the actions the team took, rather than what they did

- Not sharing tangible results

- Not thinking about learning

- Using vague language – e.g., I am collaborative

- TalkIng about what they would do, not what they did

Behavioral Example

Behavioral example

Situation/Task

Last August, I was asked to do a 20-minute presentation on our new software product to our sales team. The challenge was that I had one day to prepare and little experience speaking in front of groups.

Action

But I knew this was an important opportunity, so I sat down and got started. I wrote up an outline of the presentation, identifying the core of my message and three supporting points. I then asked Liz in Marketing to help me create an effective slide presentation. By early afternoon, I was ready to practice my presentation. I asked two of my teammates, Greg and Maria, to act as my audience. The next day I delivered my presentation in front of 18 people.

Result

About seven people came up to me after the presentation and expressed their excitement about the product, complimenting me on my speaking style.

Learning

Learned that if I make a plan, develop an outline, and practice, I'm more confident and effective when speaking in front of groups.

Value / Competency	Typical Question	Behavioral Question
Clients First: Customer Focus	What are your strengths working with clients?	Can you provide an example of a situation where you went above and beyond to meet a customer's needs or expectations?
Set the Pace: Decision Quality	How do you approach making sound decisions?	Can you share an example where your decision-making reflected the broader objectives of the team or company?

EXERCISE: Effective Interview Questions

Value/Competency

Lifts People Up
Collaborates

Is this a good question?

How do you communicate with someone you disagree with?

If not, how would you rewrite it?

Value/Competency

Innovate Always
Optimizes Work Processes

Is this a good question?

In your current role, do you create and improve work processes?

If not, how would you rewrite it?

Value/Competency

Makes An Impact
Drives Results

Is this a good question?

Are you skilled at working on cross functional teams?

If not, how would you rewrite it?

EXERCISE: Create Interview Questions

Value/Competency

Be Yourself
Courage

➢ **Create an initial behavioral based question.**

Value/Competency

Lifts People Up
Builds Effective Teams

➢ **Create an initial behavioral based question.**

Value/Competency

Innovate Always
Tech Savvy

➢ **Create an initial behavioral based question.**

EXERCISE: Probing Questions

Probe for...	Example Questions	Key Points
Full START	• Describe a time… • Give an example… • Can you share another example…	Necessary when answers are vague, opinions, or theoretical.
Situation / Task	• What was the situation? • What were the circumstances? • Why did you…?	Important to understand context (e.g., scope, complexity, timeframe/ recent, linkage to resume). Push back if its hypothetical.
Action	• Explain your role, what exactly did you do? • How did you approach the situation? • Describe specifically how you did that… • Walk me through the steps you took…	Watch for "I" vs "We" language– need to understand *their* role, not teams. Probe for rationale, or consideration of alternatives.
Results	• What was the impact? • What was the outcome? • What feedback did you receive?	Listen for magnitude of the impact - quantitative or qualitative.
Take Aways	• What did you take away from this? • What would you do differently next time? • Describe a time since then when you used what you learned.	Listen for self-reflection, seek feedback, apply learnings to new challenges.

NOTES

EXERCISE: Probing Questions

Are these complete examples?

Candidate Answer

I have successfully led people for 10 years and am great at delegating. As a result, my direct reports have grown tremendously.

Candidate Answer

In my previous role, I supported XYZ client, who had a history of challenging interactions.

Over two months, I invested in building this relationship by spending time listening to their specific needs, visiting the client site, and learning more about their business.

Candidate Answer

I was a member of a cross-functional, high-profile project. In the middle of the project, many team members left the organization.

I then reprioritized my workload to dedicate extra time to this work. As a result, the project delivered on time and budget, and I learned the power of ongoing prioritization in the midst of constant change.

If not, what would you ask to gather more information?

What are some techniques to take good notes?

- ❑ Explain early in the interview that you will be taking notes and why you are taking notes.

- ❑ Take notes that reflect exactly what the candidate said.

- ❑ Avoid recording subjective generalizations or impressions.

Interviewing Recap

DOs and DON'Ts of Interviews

☑ Do be creative within the Framework

⚠ Do sell the candidate

⚖ Do be consistent

🎚 Do be aware of your biases

📈 Do follow the 80/20 rule

✏ Do take notes

NOTES

Interviewing: Evaluate

❑ **Each interviewer** reflects on evidence they collected and assesses the candidate's ability to be successful in the role.

❑ Interviewers share feedback 1:1 with Hiring Leader or Recruiter.

❑ Hiring Leader / Recruiter determines next steps.

All Interviewers: Evaluate candidate answers, leveraging a scale like this.

1 POOR	2 FAIR	3 GOOD	4 VERY GOOD	5 EXCELLENT
The candidate's response is vague, lacks clarity, or doesn't directly address the question. They may struggle to provide relevant examples or fail to demonstrate understanding of the topic.	The candidate's response is somewhat relevant but lacks depth or detail. They may provide generalizations without specific examples or fail to fully articulate their thoughts.	The candidate's response is clear, relevant and demonstrates a basic understanding of the question. They provide specific examples or anecdotes to support their answers and show some level of insight or thoughtfulness.	The candidate's response is thorough, well-constructed, and demonstrates a deep understanding of the question. They provide detailed examples, offer insightful perspectives, and effectively communicate their ideas.	The candidate's response is outstanding in every aspect. They demonstrate exceptional understanding, insight and communication skills. Their answers are comprehensive, articulate, and highly compelling, showcasing their expertise and suitability for the role.

Not Qualified (1-2)	Potential Hire (2-3.5)	Ideal Hire (3.5-5)
Does not meet expectations for the role.	Not yet fully meeting the expectations for the role but has potential to be developed.	Strong candidate who consistently demonstrates skill at a proficient level. You recommend hiring this candidate.

All Interviewers: Consider all information and specific ratings to determine final recommendation. Connect with the hiring manager and recruiter within 24 hours to share recommendations. It is best practice to share feedback individually to avoid groupthink.

NOTES

Interview Evaluation Form

Position:

Interviewer:

Candidate:

Date:

Interview Questions	Category	Rating
1. *EXAMPLE: Give me an example of a time you increased a team's effectiveness or productivity.*	*Leadership Behavior*	*3*
2.		
3.		
4.		
5.		
6.		

Final Recommendation:

Based on your ratings above, average your score to help determine your final recommendation. Connect with the hiring manager and recruiter within 24 hours to share evaluation recommendations. It is best practice to share feedback individually to avoid groupthink.

Not Qualified (1-2)	Potential Hire (2-3.5)	Ideal Hire (3.5-5)
Does not meet expectations for the role.	Not yet fully meeting the expectations for the role but has potential to be developed.	Strong candidate who consistently demonstrates skill at a proficient level. You recommend hiring this candidate.

Occasionally, you may interview a candidate who does not have the right skillset for the role but may still be a great candidate for the organization. In this case, please use the following recommendation for the recruiter so that they can present the candidate to a different hiring leader or keep them in our talent pool for future opportunities.

Exceptional Hire for Different Role/Level

Strong candidate but may not be a match for this role or level. Please include a recommendation for what team or role they would be better suited for.

EXERCISE: Practice Interviewing

Overall Instructions

We will break into teams of three (3) and do three (3) interview practice rounds.

In each round, one person interviews, TA/Recruiter plays the role of the candidate, and everyone else observes.

Rounds will take about 10 min. Once all three rounds are finished, we'll come back together as a big group to debrief.

Breakout Instructions

Prepare by reading the Candidate Resume and Interview Guide (Interviewer, Observers)

Conduct the Interview, Interviewer and Observer take notes (5 min)

Debrief and share feedback (5 min).

Total time – 35 min (approximately 10 min per round)

EXERCISE: Interview Practice Round One

ROUND ONE: Candidate Resume

olivia johnson

contact

📞 (555)555-5555

✉️ Olivia.Johnson@example.com

Customer Service Representative with a proven track record in enhancing customer satisfaction and retention. Skilled in communication, problem-solving, and CRM software. Known for implementing innovative solutions that boost team efficiency and overall customer experience.

skills

- Customer Service
- Communication
- Problem Solving
- Time Management
- Team Collaboration
- CRM Software
- Conflict Resolution
- Active Listening

education

may 2022 — **Master's Degree: Business Administration**
University of Illinois | Champaign, Illinois

may 2020 — **Bachelor's Degree: Management**
Illinois State University | Normal, Illinois

work history

mar 2024 - mar 2025 — **Customer Service Representative**
Harmony Solutions | Springfield, IL

- Resolved 100+ customer queries daily
- Achieved 95% customer satisfaction rate
- Trained 5 new team members in best practices

mar 2023 - mar 2024 — **Customer Care Specialist**
BrightPath Services | Springfield, IL

- Managed 50+ daily customer calls
- Increased customer retention by 20%
- Developed a new customer feedback system

accomplishments

- Implemented a new CRM system, boosting efficiency by 30%
- Successfully resolved a high-profile customer dispute

EXERCISE: Interview Practice Round One

ROUND ONE: Interview Guide, Candidate 1 – Early in Career – Generic/Customer Service/Ops

Behavioral Questions:

1. **Describe a scenario where you worked as part of a team.** This question evaluates the candidate's teamwork and collaboration skills. They could mention experiences from group projects in school, community service, or any other team-based activities.

2. **Can you tell me about a time when you had to quickly adapt to a new situation?** This question helps assess the candidate's adaptability and ability to handle change. For example, they might talk about adapting to a new curriculum in school or learning a new skill for a volunteer project

3. **Can you describe a time when you had to prioritize multiple tasks?** This question helps assess the candidate's organizational and time management skills. They could talk about balancing schoolwork, extracurricular activities, and personal commitments

4. **Can you give an example of a time when you had to learn a new technology or skill quickly? How did you go about it, and how did it benefit your work?** This question explores adaptability and continuous learning. Alex should discuss a situation where they successfully acquired new knowledge or skills and applied them to improve their performance or project outcomes.

EXERCISE: Interview Practice Round One

Round One: Interviewer Preparation / Notes

Read the Candidate Resume and Interview Guide. Use below for notes.,

NOTES

EXERCISE: Interview Practice Round One

ROUND ONE: OBSERVER CHECKLIST

❑   Overall, what went well? What could be improved?

❑   How did the candidate respond to the questions? Did they share complete START-T?

❑   How were the prompting questions? Were they effective in pulling out important information? In the end, did the interviewer, get good, complete information? Why or why not?

❑   Other thoughts and feedback?

NOTES

EXERCISE: Interview Practice Round TWO

ROUND TWO: Candidate Resume

NOVA MARTINEZ
Customer Service Sales

✉ novamartinez1@email.com   ☎ (123) 456-7890   ◉ New York, NY
🔗 LinkedIn

WORK EXPERIENCE

Customer Service Sales
American Express

📅 October 2020 - current   ◉ New York, NY

- Increased product recommendation accuracy and CRM efficiency via data organization on Pipedrive
- Tackled 150+ inquiries per day on Freshchat, *improving customer satisfaction rate by 26%*
- Worked with marketing to launch an email campaign using Sendinblue, boosting client outreach by 12%
- Grew brand visibility and interactions by 41% by using Sprout Social for customer engagement

Office Clerk
Adecco

📅 June 2016 - September 2020   ◉ Melville, NY

- Improved document retrieval efficiency by *orchestrating the transition of 1,200+ physical documents to a digital format*
- Coordinated meeting schedules for a team of 37, improving productivity and reducing scheduling conflicts
- Managed data entry tasks with a high accuracy rate, reducing data correction time and increasing efficiency
- Cut travel-related costs and ensured seamless business trips by overseeing arrangements for C-suite executives

Waitress
Ted's Pizza Palace

📅 May 2014 - May 2016   ◉ Menomonie, WI

- Upsold menu items and contributed to a 20% boost in additional sales over a six-month period
- Boosted client satisfaction ratings by 18% by working with kitchen staff to accommodate special dietary requests
- Handled high-pressure situations during peak hours, serving 220+ customers per shift
- *Eliminated shortages through regular inventory checks* for cutlery and dining room supplies

EDUCATION

Bachelor of Science
Retail Merchandising and Management
University of Wisconsin - Stout

📅 2012 - 2016
◉ Menomonie, WI

SKILLS

- Pipedrive
- Freshchat
- Desk.com
- Aircall
- Sprout Social
- Sendinblue

HOBBIES

- Poetry writing
- Portrait sketching
- Vector illustration

EXERCISE: Interview Practice Round Two

ROUND TWO: Interview Guide. Candidate 2 – Advanced Professional – Generic/Customer Service/Ops

Behavioral Questions:

1. **Can you describe a time when you worked as part of a team to achieve a common goal? What was your role, and how did you contribute to the team's success?** This question helps assess the candidate's ability to collaborate with others, their understanding of teamwork dynamics, and their specific contributions to achieving team objectives.

2. **Tell me about the most stressful situation you've managed in a customer service environment. How did you handle it, and what was the outcome?** This question helps assess the candidate's ability to maintain composure, effectiveness, and strategic thinking during high-pressure situations. It also provides insight into their problem-solving skills, emotional regulation, and leadership capabilities in challenging circumstances.

3. **Can you describe a time when you introduced a new idea or process to improve customer service operations? What was the innovation, how did you implement it, and what was the impact on customer satisfaction and team performance?** This question helps assess the candidate's ability to think creatively, their approach to implementing innovative solutions, and the tangible results of their efforts in enhancing customer service.

EXERCISE: Interview Practice Round Two

Round TWO: Interviewer Preparation / Notes

Read the Candidate Resume and Interview Guide. Use below for notes.,

NOTES

EXERCISE: Interview Practice Round Two

ROUND TWO: OBSERVER CHECKLIST

- ❑ Overall, what went well? What could be improved?

- ❑ How did the candidate respond to the questions? Did they share complete START-T?

- ❑ How were the prompting questions? Were they effective in pulling out important information? In the end, did the interviewer, get good, complete information? Why or why not?

- ❑ Other thoughts and feedback?

NOTES

EXERCISE: Interview Practice Round Three

ROUND THREE: Candidate Resume

First Name
Last Name

123 Main Street, DFW, Texas 75104
(XXX) XXX_XXXX
greatcandidate@gmail.com

Education

Bachelor of Arts, Business Administration, University of North Texas, Denton, TX, August 2024

Areas of Expertise

Client/customer service mindset • MS Office Suite • Team player • Active listening • RESPA • Loan systems/processes • Innovative • Research & Analysis • Encompass • Detail-oriented • Organization • Critical thinking • Strategic relationship building • Abstract reasoning • Banking processes

Experience

July 2023 – Present

Sr. Associate, XYZ Group/CoreLogic, Irving, Texas

Clearly communicate scenarios with detailed explanations, timeline reviews, and payment processing details to form a complete picture of complex claims assigned. Analyze data, gather insights, and model solutions. Manage assigned processes to meet deadlines. Enter research findings into a MS Access database. Assist peers with guidance to share knowledge and understanding based on experience. Handle multiple tasks in a fast-paced, deadline driven environment using multiple platforms to perform job functions. Work with other departments to identify and track payments.

OCTOBER 2021 – July 2023

Post Closing Coordinator/Zillow Closing Services, Irving, Texas

Review signing package to ensure all documents are fully executed to lender's satisfaction to receive funding authorization. Coordinated corrections when needed between departments and involved parties. Effectively resolve post-closing questions from buyers/sellers/lenders through partnering with third-party vendors for on-time delivery and processing of necessary documents for closing. Manage reports required to complete shipping of files and other documents as needed to complete investor requirements. Review purchase contracts across multiple states and uploading relevant information to files. Work cross-functionally with members of adjacent operations team, including exam, curative, funding, and post-closing, in a collaborative manner.

February 2021 – August 2021

Funding Coordinator/Kind Lending, Santa Ana, California

Responsible for the timely disbursement of funds for all transactions in accordance with lender requirements plus local and national escrow requirements. Review loan documentation and collateral files for accuracy prior funding. Review files for completeness and adherence of fees and compliance with TRID regulation. Review and approve signed closing documents, notifying the settlement agent to release funds. Manage funding inbox, ensuring communication with clients in a timely manner via telephone or email. Verify accuracy of data between documents and company systems.

EXERCISE: Interview Practice Round Three

ROUND THREE: Interview Guide, Candidate 3 – Internal– Generic/Customer Service/Ops

Behavioral Questions:

1. **Can you share an example of a time when you collaborated with another department to solve a customer issue? What was the situation, how did you work together, and what was the outcome?** This question helps assess the candidate's ability to work cross-functionally, their collaboration skills, and their effectiveness in resolving customer issues through teamwork.

2. **Can you describe a time when you identified an opportunity to improve a process in your current role? How did you implement the change, and what was the impact on your team and overall operations?** This question helps assess the candidate's ability to recognize and act on opportunities for improvement, their implementation skills, and the resulting benefits to both the team and operations. It also allows the candidate to demonstrate their understanding of the company's processes and their proactive approach to enhancing efficiency and effectiveness.

3. **Can you describe a time when you received constructive feedback from a supervisor or colleague? How did you respond to the feedback, and what steps did you take to improve?** This question helps assess the candidate's ability to accept and act on feedback, their willingness to learn and grow, and their approach to continuous improvement.

EXERCISE: Interview Practice Round Three

Round Three: Interviewer Preparation / Notes

Read the Candidate Resume and Interview Guide. Use below for notes.,

NOTES

EXERCISE: Interview Practice Round Three

ROUND THREE: OBSERVER CHECKLIST

❑ Overall, what went well? What could be improved?

❑ How did the candidate respond to the questions? Did they share complete START-T?

❑ How were the prompting questions? Were they effective in pulling out important information? In the end, did the interviewer, get good, complete information? Why or why not?

❑ Other thoughts and feedback?

NOTES

Interview Evaluation Form

Position:

Interviewer:

Candidate:

Date:

Interview Questions	Category	Rating
1. *EXAMPLE: Give me an example of a time you increased a team's effectiveness or productivity.*	*Leadership Behavior*	*3*
2.		
3.		
4.		
5.		
6.		

Final Recommendation:

Based on your ratings above, average your score to help determine your final recommendation. Connect with the hiring manager and recruiter within 24 hours to share evaluation recommendations. It is best practice to share feedback individually to avoid groupthink.

Not Qualified (1-2)	Potential Hire (2-3.5)	Ideal Hire (3.5-5)
Does not meet expectations for the role.	Not yet fully meeting the expectations for the role but has potential to be developed.	Strong candidate who consistently demonstrates skill at a proficient level. You recommend hiring this candidate.

Occasionally, you may interview a candidate who does not have the right skillset for the role but may still be a great candidate for the organization. In this case, please use the following recommendation for the recruiter so that they can present the candidate to a different hiring leader or keep them in our talent pool for future opportunities.

Exceptional Hire for Different Role/Level

Strong candidate but may not be a match for this role or level. Please include a recommendation for what team or role they would be better suited for.

HUMAN RESOURCES

Interview Guide

Part 1 - For Hiring Leaders: Interview Preparation

As a leader, finding top talent is one of your most important responsibilities. Top performers will drive the future of the business and, by adding exponential lift, they can influence the results, culture, and potential of your team. We created this interview guide to help you evaluate candidate skills, abilities, experience, and potential.

Freedom within a Framework

This document serves as a foundational template for interviews. Recognize the uniqueness of each level and role, thus striving to maintain a balance between consistency and flexibility.

As the interviewer, you are empowered to craft your own questions using this guide as recommended best practices. Our aim is to ensure that interviews are an opportunity for you to fairly assess talent and engage the candidates with our brand.

Strategize

We encourage you to take time to identify the role you want to open, think strategically about your team, and needs and not just simply backfill an existing role. Once you have identified the role, map out the responsibilities and competencies associated with the position. The recruiter will send you the Strategy Intake Form. Please use this to help your recruiter source talent that meets your expectation and will help you identify the criteria you will need to assess in potential candidates.

Map Out Your Interview Plan

Pick your interview team:

Be thoughtful when selecting your interview team to ensure a fair and thorough assessment of candidates and recognize that interviewers represent the company. Communicate with the interview team in advance about the role, the skills, competencies, and experiences you are seeking. Map out what areas you would like your interviewers to focus on and ideally pair them up in panels of two. Different roles may require different amounts of interviewers. For entry level or basic role, you may only need 1-2 interviews, but for more complex roles it may require 3-5 interviews.

The following are recommendations when choosing your interview team and preparing them:

- Select a representative interview team. Think about pulling in stakeholders from other teams with whom they will work to fully represent Cotality.

- If a senior leadership role, consider including your HRBP.

Create your interview schedule:

Creating a well-structured interview schedule provides a fair and consistent experience for all interviewees, facilitating more informed and equitable hiring decisions.

Determine the number of interview rounds for candidates, strategically plan which stakeholders will be involved at specific stages of the process and decide whether it will be in-person or virtual.

Determine how long each interview will take. Consider the complexity of the role, the depth of discussion required, and the number of questions to be covered.

Discuss the expectations of each interviewer. Share your interview plan and communicate what skills and behaviors each interviewer should target so that there is no overlap in questions. It is your role, as the leader, to get your team excited about interviewing and communicate that it is an honor to be a part of the selection process.

Part 2 - For All Interviewers: Tips and Tools

Map out the flow of the individual interviews. Here is a sample agenda for a 1-hour interview:

Introduction & Opening Questions → Job Specific Questions → Core Values & Aligned Competency Questions → Candidate Questions, Closing & Next Steps

Use Behavioral Interviewing. Behavior from the past may be the best predictor of future behavior when conditions are similar, but the ability to learn from experience and apply those learnings to new challenges is a clear indicator of a person's potential to perform in the future under new and unknown circumstances.

"Learning agility" is a strong predictor of people who perform well in challenging, first-time situations. They have the potential to succeed at higher levels of responsibility.

Our objective is to select candidates that can perform the job in its current state and evolve as the job or organization changes so that they can grow with us.

Probe for more information. If the candidates do not answer using the START format, leverage the following structure to probe for more insight.

S – Tell me more about XYZ, (the "Situation").

T – What was your specific "Task" or expected outcome from this situation?

A – What "Action" did you take to execute the task?

R – What were the "Results"?

T – What did you "Take-away" from that experience? *This is where you can analyze their learning agility. Dig into what they learned from the experience and how they applied that to future experiences.

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The DOs and DON'Ts of Interviewing

✓ **DO** be creative within the framework. Interviews are meant to be conversational. Not every candidate will provide you with the same level of detail in their responses so take the liberty to probe deeper into their responses while trying to remain fairly consistent across all candidates.

✓ **DO** learn the basics. Apart from preparing for your interview, ensure both the leader and interview team are proficient in conducting effective interviews. Additional resources can be found on our Hiring & Interviewing SharePoint site.

✓ **DO** sell the candidate. Be yourself and provide a great candidate experience! Interviewing is not only an opportunity to assess talent, but it is also a window into the organization for the candidate who is equally assessing Cotality and the role. We are competing in the market for top talent. Remember to share the reasons why this is a great job – think about the WIIFM for the candidate (What's in it for me).

✓ **DO** be aware of your unconscious biases. Unconscious bias affects everyone. It is the automatic judgments and assessments our brain makes without us even realizing it. These judgments can be based on several factors such as race, background, gender, education, life experiences, sexuality, ethnicity, ability, age, and more. But do not worry, we can defeat this! Research-based strategies such as identifying and acknowledging our biases (self-awareness), increasing exposure to diverse groups, and practicing mindfulness can help us overcome unconscious bias and create a more inclusive world. Uncovering Unconscious Bias in Recruiting and Interviewing.

✓ **DO** be consistent. Ask the same questions for each candidate for a particular position so that you may fairly compare candidates.

✓ **DO** follow the 80/20 rule. The 80/20 is a good principle to apply when interviewing. When conducting an interview, the candidate should be doing around 80% of the talking, leaving you with the remaining 20% of the time to frame questions, probe for more information and insight, and, where appropriate, promote the position so that it is attractive to the candidate.

✓ **DO** take notes. Stay engaged but record key facts and bullet-point observations to keep your recollections fresh. Be strictly factual and watch out for unconscious biases.

✱ **DON'T** get off track. With limited time, it is important to make sure you are getting to the meat of the conversation and digging into what you really need to know to make an educated decision. Avoid questions about personal information, health, family, nationality, financial status, criminal record, or affiliations during interviews to prevent discrimination and ensure compliance with legal regulations. Additional legal consideration can be found on our Interview Question Best Practices document.

Part 3 - For All Interviewers: Let's Interview!

📄 Develop Your Interview Questions

To conduct a thorough and impartial assessment of the candidate's experience, expertise, skill, and potential, it is essential to proactively plan your interview questions and evaluation criteria. As you develop your questions, consider the following tips:

- Create 5-10 questions per interview to ask your candidate. Choosing the right interview questions is pivotal, as it shapes the depth and quality of insights gained from candidates – ensuring a more insightful and informed hiring process.

- Pre-screen the resume before the interview and highlight areas you want to dig into.

- Create your own questions tailored to the specific needs of your interview or discussion. The sample questions provided serve as a helpful guide.

🤝 Introduction & Opening Questions – 1-2 Questions

Introduce yourself, share your description of the role and ask introduction questions to build rapport with the candidate. This is your chance to make the candidate feel comfortable. Consider starting with an icebreaker question before diving into their background and resume.

Sample Questions

- Walk me through your career progression.

- What interests you about this role?

- Tell me about your current role and what has led you to consider something different?

- What are your career aspirations?

- What is your superpower?

- What is on your learning bucket list- something you want to improve or learn?
    - *Depending on their resume and responses, you may consider probing further for additional information on leadership experience, strategic transformation initiatives, career defining moments, and motivations.*

☑ Job Specific Questions – 3-5 Questions

Refer to the job descriptions to develop 3-5 questions that will help you evaluate if the candidate has the functional and technical knowledge, skills, and ability needed to be successful in the role.

Sample Questions

- Tell me about a time you demonstrated *<insert specific job expectation/ character skill that aligns strongly with the role>* to solve a problem you were faced with at work.

- Can you share an example of a project you completed recently where you used *<insert specific competency/hard skill that aligns strongly with the role>*?

Exercises. Some roles may require you to incorporate role playing or technical exercises. Connect with the hiring leader to understand their expectations for your interview.

EXAMPLES

- Coding exercises using pairing or whiteboarding
- Role playing a customer service call

Core Values & Aligned Competency Questions – 1-2 Questions

Ensuring incoming employees are coordinated with the company's values is vital for our success and continued growth. Pick 1-2 specific behaviors to assess in each interview and pose a corresponding question for each behavior.

For each Core Value in the chart below, the first two competencies are aligned for individual contributor roles and the third for leadership roles. However, you can use any of the competencies for your role if it aligns with the job description.

Core Value	Competency	Definition	Sample Questions
Be Yourself.	Individual Contributor (IC): Courage	A great individual contributor is not afraid to take on challenging tasks, confront difficult issues, and support others in doing the same. They provide clear and helpful feedback and are willing to stand up for their ideas, even if others disagree.	• Tell me about a time you accepted an assignment where the odds of success were against you. • Describe a time when you challenged an idea or approach.
	Individual Contributor (IC): Self-Development	A great individual contributor is committed to continuously improving themselves. They take on new assignments to broaden their capabilities and learn from new experiences, others, and structured learning. They make the most of available development resources to grow and improve.	• Tell me about a time you took a job or assignment that required new or different skills. • Describe the feedback you considered to decide where to focus your development efforts.
	Leadership (L): Drives Vision & Purpose	A great leader is someone who can imagine a bright future, set clear goals, and rally everyone around a common vision. They can inspire and energize their team and are committed to making that vision a reality.	• Tell me about an occasion when you adjusted your priorities to align with the team/organization's vision. • Tell me about a situation when you were working with an unenthusiastic group and needed to energize them about the future. • Describe a time when you worked with a group to develop their mission and vision.

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Core Value	Competency	Definition	Sample Questions
Lift people up.	*IC: Collaborates*	A great individual contributor is someone who works cooperatively with others across the organization to achieve shared objectives. They represent their own interests while being fair to others, partner with others to get work done, credit others for their contributions and accomplishments, and gain the trust and support of others.	• Describe a time you worked with multiple groups or people who had different interests. • Tell me about a time you succeeded in an initiative by collaborating with others.
	IC: Situational Adaptability	A great individual contributor is someone who can quickly adjust their behavior and approach to match the changing demands of different situations. They can adapt in real-time to meet new challenges and shifting priorities.	• Give me an example of a situation where you had to adjust your style to get something done. • Describe a time when you adapted your style due to the people around you.
	L: Builds Effective Teams	A great leader is someone who knows how to build an inclusive team, set common goals, and create a shared mindset. They foster a sense of belonging and boost morale by recognizing and rewarding team efforts. They also encourage open dialogue and collaboration, making sure everyone's voice is heard.	• Tell me about a time you were in charge of a team and needed to get them focused around common goals. • Describe a team experience when the members didn't work well together. • Give me an example of a time you increased a team's effectiveness or productivity.
Make an impact.	*IC: Ensures Accountability*	A great individual contributor is someone who follows through on commitments, acts with a clear sense of ownership, takes personal responsibility for decisions, actions, and failures, establishes clear responsibilities and processes for monitoring work and measuring results, and designs feedback loops into work.	• Tell me about a time when you and your team struggled because you were not clear about who was responsible for a task or project. • Recall a time you made a mistake while working with others and had to make it right.
	IC: Manages Complexity	A great individual contributor is someone who asks the right questions to accurately analyze situations, acquires data from multiple and diverse sources when solving problems, uncovers root causes to difficult problems, and evaluates pros and cons, risks, and benefits of different solution options.	• Tell me about a time you found a work problem to be significantly more complex than you initially thought. • Tell me about a time when your chosen solution didn't work, and you had to rethink the problem from scratch.

Core Value	Competency	Definition	Sample Questions
	L: Drives Results	A great leader is someone focused on achieving results and does not let obstacles get in their way. They have a proven track record surpassing their goals and can drive themselves and their team to success.	• Tell me about a time you got results even though some major factors changed, such as a budget cut, competitor move, or market shift. • Tell me about a time you stepped in during a project to help the team achieve its goals. • Tell me about a time when you got results that far exceeded others' expectations.
Client first.	*IC: Customer Focus*	A great individual contributor is someone who gains insight into customer needs, identifies opportunities that benefit the customer, builds, and delivers solutions that meet customer expectations, and establishes and maintains effective customer relationships.	• Tell me about a time when you went the extra mile for a challenging customer. • Tell me about a time you created a new service, process, or product based on customer feedback.
	IC: Business Insight	A great individual contributor is someone who understands how businesses work and how organizations make money. They keep up with current and potential future policies, practices, and trends in the organization, with the competition, and in the marketplace, and apply this knowledge to advance the organization's goals.	• Explain how you keep yourself current on business practices and trends. • Describe a time you made a decision that had a positive impact on the business.
	L: Balances Stakeholders	A great leader is someone who understands the needs of their stakeholders and can balance multiple interests. They consider cultural and ethical factors and act fairly, even when faced with conflicting demands from different stakeholders.	• Describe a time when you had to factor competing stakeholder perspectives into a decision. • Tell me about a time when you anticipated stakeholder needs and concerns. • Give me an example of when you needed to manage expectations of stakeholders whose views were different from your own.
Innovate, always.	*IC: Optimizes Work Processes*	A great individual contributor is someone who identifies and creates the processes necessary to get work done, separates and combines activities into efficient workflow, designs processes and procedures that allow managing from a distance, and seeks ways to improve processes, from small tweaks to complete reengineering.	• Tell me about a time you were faced with processes, systems, or workgroups that were delivering poor quality. • Tell me about a time when you modified a process someone else designed.

Core Value	Competency	Definition	Sample Questions
	IC: *Tech Savvy*	A great individual contributor is someone who anticipates the impact of emerging technologies and adjusts, scans the environment for new technical skills, knowledge, or capabilities that can benefit business or personal performance, rejects low-impact or fad technologies, and readily learns and adopts new technologies.	• Tell me about the biggest technological challenge you have ever had to overcome. • Describe a time when picking up a new technology worked really well for you.
	L: *Cultivates Innovation*	A great leader is someone who produces new and practical ideas and offers fresh perspectives on problems. They can turn their creative ideas into action and encourage diverse thinking to foster innovation.	• Tell me about a time when you brought another person's or group's idea to successful completion. • Tell me about a time when you came up with some new ideas to solve an old problem. • Tell me about a time you took a risk on a new product or solution and it paid off.
Set the pace.	**IC**: *Action Oriented*	A great individual contributor is someone who readily acts on challenges, identifies, and seizes new opportunities, displays a can-do attitude in good and bad times, and steps up to handle tough issues.	• Tell me about a time you had to decide between more planning or taking immediate action. • Tell me about a time when you acted too hastily and had to deal with the consequences.
	IC: *Decision Quality*	A great individual contributor is someone who makes sound decisions, even in the absence of complete information, by relying on a mixture of analysis, wisdom, experience, and judgment. They consider all relevant factors and use appropriate decision-making criteria and principles and recognize when a quick 80% solution will suffice.	• Give me an example of a difficult problem you worked on and walk me through your decision-making process. • Describe a time when you made a major decision and were really pleased with the outcome.

Core Value	Competency	Definition	Sample Questions
	L: Strategic Mindset and Manages Ambiguity	A great leader possesses the foresight to anticipate future trends and envision various potential scenarios. They adeptly navigate ambiguity, articulating a compelling vision for sustainable value while devising strategic initiatives that seamlessly align with their vision, fostering a competitive edge through decisive action.	• Describe a time you had to develop a strategy that would create value for your organization or customers. • Describe a time when you were part of an organization or group and thought the strategy was lacking or inadequate. • Tell me about a time you were implementing a strategy and had to revise it or change direction due to changes in the competitive landscape. • Tell me about a time when you had to act on something important before you had time to come up with a clear answer or solution. • Tell me about a time when you had to make a decision and the information available was inadequate.

For additional questions, please check out our Interview Question Bank.

Evaluation

Careful assessment in interviews is crucial for making smart hiring choices, ensuring candidates have the right qualifications, skills, and potential for your team requirements. It is important to use the same questions for all the candidates in the group to compare them fairly. Consider using the scale below to evaluate how your candidate answered each interview question.

Rating Scale

Don't rely on just numbers to make a decision; ensure that you have a business case from the interview to justify your ratings.

1 POOR	2 FAIR	3 GOOD	4 VERY GOOD	5 EXCELLENT
The candidate's response is vague, lacks clarity, or doesn't directly address the question. They may struggle to provide relevant examples or fail to demonstrate understanding of the topic.	The candidate's response is somewhat relevant but lacks depth or detail. They may provide generalizations without specific examples or fail to fully articulate their thoughts.	The candidate's response is clear, relevant and demonstrates a basic understanding of the question. They provide specific examples or anecdotes to support their answers and show some level of insight or thoughtfulness.	The candidate's response is thorough, well-constructed, and demonstrates a deep understanding of the question. They provide detailed examples, offer insightful perspectives, and effectively communicate their ideas.	The candidate's response is outstanding in every aspect. They demonstrate exceptional understanding, insight and communication skills. Their answers are comprehensive, articulate, and highly compelling, showcasing their expertise and suitability for the role.

Sample Interview Evaluation

Position:

Interviewer:

Candidate:

Date:

Interview Questions	Category	Rating
1. EXAMPLE: Give me an example of a time you increased a team's effectiveness or productivity.	Leadership Behavior	3
2.		
3.		
4.		
5.		
6.		

Final Recommendation:

Based on your ratings above, average your score to help determine your final recommendation. Connect with the hiring manager and recruiter within 24 hours to share evaluation recommendations. It is best practice to share feedback individually to avoid groupthink.

Not Qualified (1-2)	Potential Hire (2-3.5)	Ideal Hire (3.5-5)
Does not meet expectations for the role.	Not yet fully meeting the expectations for the role but has potential to be developed.	Strong candidate who consistently demonstrates skill at a proficient level. You recommend hiring this candidate.

Occasionally, you may interview a candidate who does not have the right skillset for the role but may still be a great candidate for the organization. In this case, please use the following recommendation for the recruiter so that they can present the candidate to a different hiring leader or keep them in our talent pool for future opportunities.

Exceptional Hire for Different Role/Level

Strong candidate but may not be a match for this role or level. Please include a recommendation for what team or role they would be better suited for.

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Sample Interview Evaluation

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Interviewer:

Candidate:

Date:

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