

Telephone Pre-Qualification Interview

The purpose of the telephone pre-qualification interview is to assess the potential sales candidate prior to setting up a face-to-face interview. This is particularly important if the candidate is located some distance away and there will be travel expenses involved in conducting a face-to-face interview.

Instructions:

1. After reviewing the candidate's resume, use the *Questions* form to prepare appropriate questions about the person's CV. Questions for the remaining three categories may be common to all candidates. If not, write the appropriate questions on the form before making the call.

Some questions you might ask:

- What interests you about this job?
- Why do you want to make a change at this point in your career?
- Tell me about your sales experience.

Some typical "knock-out" or disqualifying questions might be:

- Are you willing to travel two days a week?
- How comfortable are you with a commission-only compensation plan?

2. Rate how you *feel* about the candidate's responses by circling the appropriate number on the *Questions* form.
3. Thank the candidate and tell him or her that you'll be back in contact should you decide to move forward.
4. Complete the *Other Observations* form after you terminate the call.

Because most salespeople often use the telephone in dealing with customers, they should sound upbeat, positive, and somewhat enthusiastic. If the candidate lacks these qualities or doesn't impress you, he or she is unlikely to impress your customers as well.

Only move forward with a Sales Temperament Assessment and formal interview if you liked what you heard. While there are no guarantees, if the person sounds good over the telephone, he or she is likely to be even better in person.

If you get poor answers to your questions, or the potential candidate doesn't communicate well over the telephone, go no further. Simply thank the candidate and tell him or her that you'll be back in contact should you decide to move forward.

A bit of preparation and a six- to ten-minute telephone call may save you hours of wasted time.



Telephone Pre-Qualification Interview – Questions

Candidate: _____ Date: _____

Interviewed by: _____

CV-Related Questions:

1)

UNSATISFACTORY
POOR
FAIR
SATISFACTORY
GOOD
EXCELLENT

0 1 2 3 4 5

2)

0 1 2 3 4 5

3)

0 1 2 3 4 5

Position-Related Questions:

1)

0 1 2 3 4 5

2)

0 1 2 3 4 5

3)

0 1 2 3 4 5

General Questions:

1)

0 1 2 3 4 5

2)

0 1 2 3 4 5

Knock-Out Question(s):

1)

0 1 2 3 4 5

2)

0 1 2 3 4 5

Score: _____ or _____% (score ÷ 50 x 100 = %)
Maximum score is 50. Minimum acceptable score is 30 (60%).



Telephone Pre-Qualification Interview - Other Observations

Candidate: _____ **Date:** _____

Interviewed by: _____

VOICE QUALITY	Yes	No	Comments/Observations
Tone: pleasant, varied, some inflection and not monotone.			
Pace: good pacing, neither too fast nor too slow; not rushed.			
Diction: crisp, clear, correct word pronunciation.			
Volume: easily heard; neither too loud nor too soft.			
Vocabulary: avoided overuse of slang, filler words, non-professional words or phrases.			
Total			<i>5 yeses required*</i>

LISTENING TECHNIQUES	Yes	No	Comments/Observations
Acknowledged questions and statements.			
Answers were correct, clear and concise. Didn't over-answer.			
Didn't interrupt.			
Allowed interviewer to interrupt.			
Encouraged two-way communications by pausing occasionally.			
Asked questions to get more information or to ensure understanding.			
Total			<i>At least 3 yeses required*</i>

SALES & SERVICE ATTRIBUTES	Yes	No	Comments/Observations
Interested: volunteered information without being prompted. Had a basic understanding of the company and the position.			
Confident: responded without hesitancy.			
Courteous: questions and comments were phrased politely.			
Communicative: acknowledged, paraphrased, recapped, or mirrored questions and answers.			
Persuasive: tried to sell himself/herself for an interview.			
Total			<i>At least 2 yeses required*</i>

***Scoring:** Candidates should score a Yes in all 5 categories under Voice Quality, 3 out of 6 under Listening Techniques, and 2 out of 5 under Sales & Service Attributes before doing a Sales Temperament Assessment or being considered for a face-to-face interview.