

Practical Sales Management : Traits and Values Interview

Using a “Traits and Values” interview with candidates for sales, customer service and sales support positions can significantly increase the likelihood that chosen candidates will succeed in the role because a much deeper understanding of the candidate is created in the process.

A Traits and Values interview should be conducted by 2 - 3 people at the same time so that reactions and responses can be tracked by others who are involved in the decision process and who are not actively asking the questions. We recommend that questions be developed to explore nine specific areas with each candidate, and we’ve provided examples of questions that can be used to explore each area. The areas are:

- *Personal Traits: Poise, self image, self discipline and self motivation*
- *Technical Knowledge: Industry and technology*
- *Selling Skills, Traits and Behaviors*
- *Leadership Traits and Skills*
- *Analytic and Thinking Skills*
- *Business Literacy*
- *Communication Skills*
- *Interpersonal Skills*
- *Personal Integrity*

The following questions should be valuable in and of themselves, but we strongly recommend that you use them as a jumping off point. We encourage you to edit, reformat and reframe them to suit your specific needs and the traits and values essential for success in your organization. We also suggest that you add questions. Some caution does need to be exercised in this process as you explore a candidate’s ethics and values. Your Human Resources leader can guide you in avoiding questions that cannot be asked legally or ethically. A review of your final questionnaire by your Human Resources leader is wise before a Traits and Values interview is used.

I. Personal Traits

I.1 Personal poise and gravitas

- I.1.1 How do friends and colleagues describe the way you present yourself?*
- I.1.2 Have others noticed that you carry and present yourself in a certain way?*
- I.1.3 What kind of professional impression or image do you want to create? How do you want people to see you? Why?*
- I.1.4 How do you go about creating that impression?*
- I.1.5 Can you give me an example of a situation where others found you influential?*
- I.1.6 Do you think you intimidate people?*

I.2 Self discipline and organization

- I.2.1 Describe your typical work week for me.*
- I.2.2 Do you take work home with you? Under what circumstances?*
- I.2.3 How would you describe the pace at which you work?*
- I.2.4 How do you handle stress and pressure?*
- I.2.5 Can you describe a time when your workload was heavy and how you handled it?*

1.2.6 Can you describe a large-scale project for which you were responsible and how you met your commitments and deadlines?

1.2.7 What does a typical day look like for you?

1.2.8 What does a hectic day look like for you?

1.2.9 Think of a time when you had to manage multiple projects and meet certain deadlines. Describe the most difficult or demanding parts of that situation. How did you deal with it and what were the results?

1.2.10 Can you describe something you worked on that required you to manage a lot of detail and how did you handle it?

1.2.11 Tell us about a time when you were unable to finish a task because you didn't have enough information or resources or because you were unprepared. What problems did that create and how did you deal with them?

1.2.12 Describe a time when you had to go above and beyond the call of duty in order to get a job done.

1.2.13 How do you evaluate success for yourself?

1.3 Self motivation and accomplishment.

1.3.1 I'm sure you'd describe yourself as a "self starter." What does that mean to you?

1.3.2 Would you also describe yourself as a "self finisher?" What does that mean to you?

1.3.3 Can you give me an example of something that required you to sustain your motivation in order both to start and finish it?

1.3.4 What motivates you?

1.3.5 Is it important for you to be the top performer?

1.3.6 Are you the top performer in your group now?

1.3.7 What kind of people motivate you?

1.3.8 Describe three of your greatest professional accomplishments for us.

1.3.9 Can you tell us how those achievements have helped you grow professionally?

1.3.10 What income do you want to create for yourself?

1.3.11 What will that income enable you to do?

1.3.12 Under what kind of management style do you work well?

1.3.13 Under what kind of management style do you prefer not to work?

1.3.14 How do you learn new things in your field?

1.3.15 What have you learned on your own that has had value in your working life?

1.3.16 In the last five years, how have you improved yourself professionally?

1.4 Risk taking and risk management

1.4.1 Tell me about something you've done that took you outside your comfort zone.

1.4.2 Tell me about a time that you took a risk that worked out well.

1.4.3 Tell me about a time that you took a risk that didn't work out well.

1.4.4 How do you feel about losing? When was the last time you lost?

2. Industry

- 2.1. What do you think are the three most critical risks or opportunities for the industry's future?
- 2.2 Is there one of those that you'd rank much higher than the others?
- 2.3 What have you done over the past year to improve your technical competence? How did you incorporate that into your current job?
- 2.4 What do you think are the critical technologies for print? How will those affect you?
- 2.5 Is there a technical achievement you're particularly proud of? What and why?
- 2.2 Digital, Offset, Sheetfed, Web
- 2.6 Mail and Distribution
- 2.6 Fulfillment
- 2.8 Data Management / Variable Data
- 2.9 Software as a User
 - 2.9.1 What software applications do you use on a regular basis?
 - 2.9.2 With which of those do you consider yourself skillful?
 - 2.9.3 Are there software applications you'd like to learn to use?
 - 2.9.4 Describe how you've learned to use software applications in the past.
 - 2.9.5 What role has technology played in your current role?
 - 2.9.6 What other technology would have been helpful?

3. Selling Skills, Traits and Behaviors

3.1 Selling Skills

- 3.1.1 Describe your selling skills for us.
- 3.1.2 Are there particular skills that are strengths of yours?
- 3.1.3 Are there others you know could be stronger?
- 3.1.4 Describe your personal sales process for us.
- 3.1.5 Tell us how you developed your largest account.
- 3.1.6 What goals have you set for yourself this year? How have you worked toward them?
- 3.1.7 What is the typical sales cycle in your current position?
- 3.1.8 How much time do you spend directly with a customer or prospect on an average day?
- 3.1.9 How many appointments do you have in a typical week?

3.2 Behaviors

- 3.2.1 Tell us about a time that you gained a new customer through networking activities.
- 3.2.2 Tell us about a customer you gained through cold calling and prospecting.
- 3.2.3 Tell us about a time where you worked hard for a sale but didn't get it in the end. How did you handle that situation?
- 3.2.4 Can you give us an example of when you had to overcome strong resistance from a customer?
- 3.2.5 Describe a new approach you recently took with a brand new prospect.
- 3.2.6 Give us an example of when you had to change your approach to a prospect because the initial one failed.
- 3.2.7 Tell us about one of the most time consuming sales you've made.

3.2.8 What do high performance salespeople have in common?

3.2.9 What does competitive mean to you?

3.2.10 What would it take for you to double your current results?

3.2.11 In your current position, who are your customers? What are their needs? How do you know you are meeting their needs?

3.2.12 Tell us about one of your most demanding customers. Why are they demanding? What conflicts have you had and how have you resolved them?

3.2.13 Can you identify a situation where you received customer feedback that made you rethink the way you were working?

3.2.14 Describe how you establish partnering relationships with your customers.

3.2.15 Describe your experience influencing or participating in a customer decision.

3.2.16 Tell me about a situation where your contact person changed at a key account. How did you respond and adjust to the new contact?

3.2.17 What are the most important skills a new salesperson needs to develop within their first few months?

3.3 Training, Tools and Resources

3.3.1 What tools or resources help you be more effective?

3.3.2 What sales training have you participated in? What did you think of it?

3.3.3 Have you developed special tools and resources just for yourself that others aren't using?

3.3.4 Have you been involved in creating brochures or other sales materials? Can you describe your involvement?

3.3.5 If you could have three additional resources that you don't have now, what would those be?

3.3.6 How are leads identified and turned into qualified prospects for you? How involved are you in that process?

3.3.7 If you had the opportunity to participate in training for any selling skill that you'd like to better develop, what kind of training would you want?

3.3.8 Do you see a role for social media in the work of professional salespeople now and in the future? Can you describe what you think will be valuable?

3.3.9 Have you worked with CRM systems? What do you like and dislike about them?

4. Leadership Skills, Traits and Behaviors

4.1 Teambuilding

4.1.1 Do you prefer to work independently or on a team?

4.1.2 Can you give us examples of a successful team experience from a prior job?

4.1.3 Can you give us an example of an unpleasant or frustrating team experience? How

did you deal with the situation?

4.1.4 Think back to an action that you took, a policy you influenced or a program you were involved in implementing that impacted the organization in a positive way. Tell us about what you did, how you did it and why.

4.1.5 What type of role do you usually play in a team?

4.1.6 Describe a situation where you worked with a group of other people to reach a goal.

4.1.7 How do you motivate others?

4.1.8 Tell me about a time when you worked in or led a team that had low morale. What did you do to help build morale?

4.1.9 Tell me about a time that you had to get your team to make a major change with which they disagreed.

4.1.10 Tell me about a time when you took responsibility for a failure.

4.1.11 Tell us about a time when you had a confrontation with a fellow team member.

4.2 Leadership

4.2.1 What does leadership mean to you? How does a leader become a leader?

4.2.2 Describe your leadership experience for us.

4.2.3 Do you have a particular leadership philosophy or particular methods? Can you describe them? Is there a time you've had to put them to the test?

4.2.4 How best does a company create a highly motivated and productive environment, particularly during difficult or changing times?

4.2.5 Describe a time when you had to resolve a conflict. How did you do it? Any regrets?

4.2.6 Describe a project or assignment that led to a process improvement.

4.2.7 Can you describe a time when you worked on a project and you weren't pleased with the speed at which it progressed? What did you do?

4.2.8 Tell us about a time when you had to make an important decision without complete information. What was the situation and what was the outcome?

4.2.9 Describe a situation where you had to make a decision that you didn't feel was your responsibility or authority to make. What course of action did you take to make sure you did the right thing?

4.3 Adaptability

4.3.1 How do you respond to changes within your current organization?

4.3.2 How do you tend to react to changes within an important customer?

4.3.3 On a scale of one to ten, how flexible are you (10 = highly flexible)?

4.3.4 Where have you had to be flexible to hit a goal or complete a project?

4.3.5 When was the last time you had to tell someone or some group that you were wrong?

4.3.6 What's the most important thing to which companies should pay attention when making significant changes? Why?

4.4 Resilience and Tough Poise

4.4.1 Tell us about a time you had to make an unpopular decision.

4.4.2 How do you overcome a manager's resistance to one of your ideas?

4.4.3 Describe an instance where you were put on the spot in an uncomfortable situation. How did you handle it? What felt important to you in that situation?

5. Analytic and Thinking Skills

5.1 Creative Thinking

- 5.1.1 Can you walk us through a situation where you needed to be creative to solve a problem?*
- 5.1.2 What does “thinking outside the box” mean to you?*
- 5.1.3 Do you consider yourself to be highly creative?*
- 5.1.4 What outlets do you enjoy for your creativity?*
- 5.1.5 Do you see a significant role for creativity in a successful salesperson?*

5.2 Conceptual Thinking

- 5.2.1 Where do you get exposure to new ideas?*
- 5.2.2 Do you enjoy reading that stretches your thinking in new directions?*
- 5.2.3 What are the last few things you’ve read that have given you new ideas?*
- 5.2.4 How important are new ideas for a successful salesperson?*

5.3 Problem-solving

- 5.3.1 How do you generally solve problems?*
- 5.3.2 Describe one of the most difficult problems you’ve faced on the job. What made the problem difficult to resolve and how did you solve it?*
- 5.3.3 What kinds of problems have people recently called on you to solve? Describe your method or approach for solving them.*
- 5.3.4 Describe a specific situation where you prevented a problem before it happened. Why were you successful preventing it? What did you learn from the situation?*
- 5.3.5 Describe a situation where you worked diligently on a project and it did not produce the desired results. Why didn’t you get the desired results? What did you learn from the experience?*

5.4 Decision-making

- 5.4.1 What kind of decision maker are you? How do you go about making decisions?*
- 5.4.2 What was your last major purchase? What were the tradeoffs in your decision?*
- 5.4.3 Describe examples of decision making required in your present role.*
- 5.4.4 What was your most challenging decision during the last six months? What made it challenging?*
- 5.4.5 Give us an example of a time when you were faced with a complex, work-related issue and couldn’t decide the best action to take. What did you do?*

6. Business Literacy

6.1 Financial

- 6.1.1 How familiar are you with financial statements?*
- 6.1.2 Can you describe the differences between a balance sheet, income statement and statement of cash flow?*
- 6.1.3 How valuable is an annual report when you’re researching a customer or prospect?*
- 6.1.4 How comfortable are you determining the financial health of your customers?*
- 6.1.5 What can you learn about a prospective customer from a Dun & Bradstreet report or other credit report?*

6.2 Structural

6.2.1 How familiar are you with how companies are structured and organized?

6.2.2 Are there important differences between a partnership and a corporation?

6.2.3 How are most of your customers organized and structured?

7. Communication Skills and Behaviors

7.1 General

7.1.1 How would you describe and rate your communication skills?

7.1.2 Tell us about a time when you had to explain a challenging concept or idea. How did you communicate it to insure that they understood?

7.1.3 Are you a proactive or reactive communicator?

7.1.4 Describe a situation where you found it difficult to communicate with others. What made it difficult? How did you overcome the difficulty?

7.2 Verbal and Oral

7.2.1 Listening

7.2.1.1 Do you consider yourself a good listener? Why?

7.2.1.2 How have you worked to improve your listening skills?

7.2.1.3 How important is note taking when you're listening?

7.2.2 Questioning

7.2.2.1 Do you ask good questions? Are they effective?

7.2.2.2 What kinds of questions do you tend to ask when working with a customer or prospect?

7.2.2.3 Have you had training in forming and asking effective questions?

7.2.2.4 Do you think that customers find too many questions annoying? Why?

7.2.3 Speaking

7.2.3.1 Can you think of a time when it was necessary to share critical information verbally? What was the situation? How did you insure that you communicated effectively and that you were understood clearly?

7.3 Persuasive Communication

7.3.1 Do you consider yourself persuasive and credible? Why?

7.3.2 What makes you persuasive? Why are you effective?

7.3.3 What prevents people from being persuasive?

7.3.4 Are you comfortable being persuasive?

7.4 Writing

7.4.1 How would you rate your writing skills?

7.4.2 Do you see writing skills as important to successful salespeople?

7.4.3 When was the last time you needed to write a sales proposal? How well did you do? Were you successful?

7.4.4 What kind of help or resources do you reach for when you need to write something important?

7.5 Negotiation

7.5.1 Do you consider yourself a skillful negotiator?

7.5.2 Have you had training in negotiating skills and processes?

7.5.3 Describe a recent situation where you negotiated terms with a difficult customer.

7.5.4 Describe a significant negotiation that failed. What went wrong? Why?

7.6 Presentation

7.6.1 What experiences have you had giving presentations?

7.6.2 Tell us about a time you needed to speak before a large audience. What was the situation? How did you feel about it? What was the outcome?

7.6.3 Do you have a preferred method for preparing presentations?

7.6.4 How do you prefer to make the actual presentation?

7.6.5 Are you a skillful presenter?

7.6.6 Tell us about a successful formal presentation you've made recently.

7.6.7 Give us an example of when you had to make a presentation to an unresponsive group. How did you handle it?

7.6.8 Have you had experience creating and delivering training?

8. Interpersonal Skills, Traits and Behaviors

8.1 Building Trust

8.1.1 Is the ability to build trust, both with customers and within your own company, an important trait for successful salespeople?

8.1.2 Think of a situation where there wasn't a trusting relationship with someone important. What did you specifically do to try and build a more trusting relationship? What was the result?

8.1.3 Describe a time when you had to go the extra mile to gain and develop trust among colleagues or customer staff. What did you learn from your experience?

8.1.4 How would you coach someone else on building trust?

8.2 Other Interaction

8.2.1 When do you need to be empathetic?

8.2.2 Describe a time when you needed to help a colleague that didn't directly benefit you.

8.2.3 How do you analyze and understand people? What do you do? What works best?

8.2.4 What do people tend to criticize about you?

8.2.5 If people who know you well were asked why we should hire you, what would they tell us?

8.2.6 Describe a time when you needed to work with a strong-willed peer or colleague. What did you do? How did you handle them so you could influence their thinking and decisions?

8.2.7 What work have you done that involved working with sensitive or confidential issues?

8.2.8 Tell us about a time when you had to speak up in order to get your point across.

8.2.9 Tell us about a time when you had to sell your manager or colleagues on one of your ideas. What was the idea and what was the outcome?

8.2.10 Describe a situation when you had a conflict with a colleague. Were you able to reach a mutually beneficial resolution? If not, why not? Knowing what you do now, what would you do differently to prevent or resolve the conflict?

8.2.11 Describe the type of people you most enjoy working with.

8.2.12 Describe a situation where you needed to work closely with someone with whom you disagreed or with whom you had a personality conflict. How did you deal with the situation?

9. Personal Integrity

9.1 Tell us about a time when you had to stand up for your values.

9.2 What are your three most important work-related values? Can you provide us examples of those values in action at work?

9.3 Give us an example of a situation when your integrity was tested and prevailed in a selling situation.

9.4 Tell us about someone you admire professionally and why you admire him or her.

9.5 How would you describe courage in a professional setting?

9.6 Have you ever confronted someone who intimidates you? What happened? How did you feel and what did you learn?

9.7 What are you passionate about in your work?

9.8 Describe what you believe is meant by the term “a strong work ethic.”

9.9 Do you have professional regrets? If so, how have you handled them?

9.10 How do you take pride in your work?

9.12 Tell us about a time when you discovered a coworker was doing something dishonest.

9.13 If you knew your boss was 100% wrong about something, how would you handle it?

9.14 At the end of your professional career, how do you want to be remembered by your peers, colleagues and customers?