**Interview Guide**

**Finance Management Trainee**

***Bank on Me***

**Table of Contents**

|  |  |
| --- | --- |
|  | Page Number |
| Interviewer Guide Overview | 1 |
| Background Review: |  |
| * Education and Coursework | 2 |
| * Finance Experience | 3 |
| * Spanish Language Skills | 4 |
| Behavioral Interview Questions: |  |
| * Leadership Experience | 5 |
| * Communication Skills | 6 |
| * Microsoft Excel Skills | 7 |

**Interviewer Guide Overview**

The purpose of this Interviewer Guide is to provide structure for making a hiring decision. This Guide includes questions to assess candidates’ qualifications for the position of Finance Management Trainee.

For the purpose of this simulation, plan on 30 minutes for each interview. You might spend your interview time as follows:

1. Greet the candidate, introduce yourself, and establish rapport (2-3 mins.)

* Welcome the candidate.
* Provide information about your position and background.
* Engage in small talk; have a short, informal conversation.
* Explain the process for the interview: general questions about the candidate’s education, specific questions about his or her experience and skills, and then time for the candidate to ask you questions.

1. Ask background review questions (5-10 mins.)

* Follow questions in this Interviewer’s Guide.
* Compare responses to confirm information on the resume.

1. Ask behavioral questions (15-20 mins.)

* Explain the rationale and process for behavioral questions: to determine how well the candidate’s past behavior will translate to requirements of the Finance Management Trainee position.
* Ask specific, behavioral questions in this Interviewer’s Guide.
* Ask follow-up questions if you need to get a complete story or (S/TAR) for each question. Ideally, for each question, you’ll understand 1) the **S**ituation or **T**ask, 2) the **A**ction the candidate took, and 3) the **R**esult—or whether the action was successful.
* Take notes throughout, while maintaining eye contact.

1. Answer the candidate’s questions (2-3 mins.)

* Encourage the candidate to ask questions about the job or the company.
* Respond honestly and completely.

1. Explain next steps and close the interview (2-3 mins.)

* Don’t promise anything at this point.
* Just describe the process (for example, “I enjoyed meeting with you and hearing about your background. We do have additional candidates to interview and will follow up with you by \_\_\_\_\_\_ [date].”

**Background Review: Education and Coursework**

*From the questions in this section, you’ll assess whether the candidate meets the minimum education requirements for the position. You’ll also confirm the information the candidate provided on his or her resume.*

1. I see that you’re graduating from \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ with a \_\_\_\_\_\_\_\_\_\_\_\_\_ degree.
2. What are you most proud of from your college experience?
3. What were your favorite classes? What did you like best about them?
4. What were your least favorite classes? What didn’t you like about them?
5. What is your GPA?

**Background Review: Finance Experience[[1]](#footnote-1)**

*From the questions in this section, you’ll assess whether the candidate has the financial skills and experience to perform the job responsibilities.*

1. When you were working at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [finance-related work experience], what were your job responsibilities?
   1. What was your favorite part of the job?
   2. What did you like least about the job?
2. [Optional]: Tell me about your responsibilities at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [second finance-related work or club experience].
3. What was your favorite part of the job?
4. What did you like least about the job?

**Background Review: Spanish Language Skills**

*From the questions in this section, you’ll assess the candidate’s Spanish language skills. Because this is listed on the job description as “a plus” and not a requirement, you may skip this question if the candidate didn’t mention any Spanish language skills in the cover letter or on the resume.[[2]](#footnote-2)*

1. How would you describe your Spanish language abilities?
2. How do you know that you are [conversational/proficient/fluent]?

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| **Note to Interviewer**  Does the information you collected so far (Education and Coursework, Finance Experience, Spanish Language Skills) match that given on the resume and in the cover letter?   * Yes. * No. Discrepancies: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Behavioral Interview Questions: Leadership Experience**

*From the questions in this section, you’ll assess the candidate’s competencies for the position, which are on the job description. You’re looking for specific examples from the candidate’s past to try to predict future behavior in similar situations at Bank on Me. You may ask follow-up questions to get a complete response or story (S/TAR) for each question. Ideally, for each question, you’ll understand 1) the* ***S****ituation or* ***T****ask, 2) the* ***A****ction the candidate took, and 3) the* ***R****esult—or whether the action was successful. You may adapt these questions to your own language, so they sound natural for you.*

1. Tell me about a time when you took a leadership role. What was the situation, what did you do, and how did it turn out?
2. As leaders, we often have to make unpopular decisions. Please describe a decision you made that others didn’t agree with. What was the decision, and what was the result?

**Behavioral Interview Questions: Communication Skills**

1. What do you consider your greatest strength in communicating with others? Can you give me an example when you used this skill or technique and tell me how it worked out?
2. Now I’d like to hear about one of your communication challenges. Please tell me about a time when you had a difficult time communicating with others. What happened?

**Behavioral Interview Questions: Microsoft Excel Skills**

1. I’d like to hear about your experience using Microsoft Excel. Please tell me about a project you completed in Excel recently. What did you do, and what feedback did you get about the results?
2. Can you give me a second example, please? What is another project you accomplished in Excel? How did you approach this one and what, specifically, did you do?

1. For a real finance job interview, questions about finance skills and experience may be included in the behavioral interview section. However, these might be difficult to answer without the actual finance knowledge, so they are included more generally here. [↑](#footnote-ref-1)
2. In a real interview, the interviewer may speak with the candidate in Spanish to test fluency. [↑](#footnote-ref-2)