



Reference Check Interview



Increase Your Odds
of Success with
Leadership Alignment

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The Demonstrated Leadership Performance “Reference Check” Interview Worksheet

Nowhere on a resume can you actually distinguish whether someone is a talented or effective leader or manager. A resume is limited to a person’s education level, list of milestone accomplishments, their employment history, their degree of experience, and the positions they have held over time. You cannot determine their dominant behavioral style, personality, degree of focus, level of emotional intelligence, or how they will respond in the face of adversity or challenges.

The validation of a candidate’s ability is usually limited to third-party feedback and the interview process, making it critical to ask the right questions during reference checks. While it is relatively easy and accurate to assess an internal candidate’s ability based upon their demonstrated performance, it is much more difficult when you are considering a new leader from outside your organization. Your challenge is to perform the same level of due diligence on all potential leaders, both internal and external.

This interview guide is designed to be used with the Success Profiles Talent Management Eye Chart Assessment, which determines leadership capability from the top down.

Important note: We realize that that performing reference checks or compiling performance feedback on new candidates can be a sensitive assignment. Often, the candidate will be seeking another position without their current employer’s knowledge; here, proper discretion is required. Often, the candidate’s previous employer (or immediate supervisor) is restricted in the degree of feedback that can be provided (positive or negative); this could be a legal issue. Often, the candidate is seeking a position that is at a level above their previous assignment or in a different industry altogether.

As a general rule you should have all candidates applying for a leadership role provide “Qualified References” that can speak open and honestly about the candidate’s demonstrated ability, track record of growth and maturity, and their overall performance. If candidates are reluctant to provide references that will provide more than just “a validation of their employment,” you will be limited in your ability to determine their relative odds of success and whether they will be a good fit for your organization and/or culture.

We recommend that if no references are provided to validate and corroborate a candidate’s self reporting, you should use a structured interview performed by a qualified third-party professional to determine if the candidate is the best choice for your open position.

If Qualified References are provided by the candidate

This interview guide is designed to be used as a scorecard with the candidate's references. You should ask the candidate to provide **five business/professional references** and be sure to perform this interview with at least three. An assumption is being made that the candidate's references will be able to provide constructive feedback about their qualifications (track record), leadership capability (talent), degree of difficulty of their previous assignments, and overall performance (success level) in their most recent assignment or role.

It is also assumed that the references will be open and honest with their feedback about the candidate. We have found that it is one thing for a reference to give a blanket endorsement of the candidate; it is another to formally grade them on specific leadership attributes and overall performance, and the differences can be enlightening. The information compiled with this assessment tool can be used to compliment your current interview and selection process. Remember, in addition to experience and job-related qualifications, you should be just as concerned with a leader's "Right Fit" within the culture of your organization.

Appointing the Right People in the Right Roles can be the most important success factor in achieving high leadership alignment and high overall performance, and it is worth taking the time to do it right.

Disclaimer: Success Profiles assumes no responsibility whatsoever in the selection or rejection of a candidate for a potential leadership position. Our role with this guide is to help you apply the same level of due diligence with external candidates (whom you have not had the opportunity to directly observe) as you would perform with internal candidates (whom you have had the advantage of observing over time).

The interviews should take between 10 and 15 minutes each.

Candidate name: _____ Reference name: _____

Position: _____ Date of interview: _____

Instructions: For each Reference interviewed, ask each item in the form of a question and ask them to give a numerical grade based upon the person's evaluation of the candidate's performance. The **0 to 4** performance scale should be used for each item in sections 1 and 2. The scale is as follows:

0 = Never 1 = Rarely 2 = Sometimes 3= Often 4 = Always

Section 1: Leadership and Management Qualifications

When considering their track record, has this Leader/Manager...

- | | | | | | |
|--|----------|----------|----------|----------|----------|
| 1. Consistently created a culture of high performance and service? | 0 | 1 | 2 | 3 | 4 |
| 2. Consistently developed or graduated other leaders over time? | 0 | 1 | 2 | 3 | 4 |
| 3. Successfully led a department in a "turnaround" of performance? | 0 | 1 | 2 | 3 | 4 |
| 4. Demonstrated high-performing technical, clinical, or financial expertise? | 0 | 1 | 2 | 3 | 4 |

Total points for the Qualifications section = _____

Section 2: Leadership and Management Attributes (Talent) or Demonstrated Ability.

Scoring Guide: A = (22 to 28 points) B = (16 to 21 points) C = (11 to 15 points) D = (10 points or less)

When considering their demonstrated leadership ability, does this Leader/Manager...

- | | | | | | |
|--|----------|----------|----------|----------|----------|
| 1. Has an optimistic and forward-looking orientation? | 0 | 1 | 2 | 3 | 4 |
| 2. Has a high EQ (emotional intelligence) & demonstrates good communication/people skills? | 0 | 1 | 2 | 3 | 4 |
| 3. Has an open-minded perspective, be willing to change, and be seen as a "change agent"? | 0 | 1 | 2 | 3 | 4 |
| 4. Is respected by his/her leaders, peers, physicians, and staff? | 0 | 1 | 2 | 3 | 4 |
| 5. Is focused on results and outcomes, is achievement oriented and sets goals? | 0 | 1 | 2 | 3 | 4 |
| 6. Has a high capacity and ability to perform in a fast-paced work environment? | 0 | 1 | 2 | 3 | 4 |
| 7. Is humble, maintains composure, and has the ability to handle high levels of stress well? | 0 | 1 | 2 | 3 | 4 |

Total points for the Talent section = _____

Overall Leadership Rank (A, B, C, D) = _____

Section 3: Degree of Difficulty (DoD) or Complexity of the Assignment.

Ask: The most recent assignment for this leader was: High DoD ____ Medium DoD ____ Low DoD ____
Refer to the Odds of Success Guide (below) for proper alignment based on the Leadership Rank calculated above.

Calculate Relative Odds of success = _____ (You are looking for probability above 60 %.)

Section 4: Overall Performance (outcomes or measurable results)

When you consider the person's leadership ability and overall results achieved, were they

Excelling (3) _____ Succeeding (2) _____ Struggling (1) _____ Failing (0) _____?

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Notes:

Scoring Summary:

Section 1: Leadership and Management Qualifiers (overall point totals).

Reference # 1 = _____ Reference # 2 = _____ Reference # 3= _____ Reference # 4 = _____ Average = _____

Section 2: Leadership and Management Attributes/Talent (overall points and grade).

Scoring Guide: A = (22 to 28 points) B = (16 to 21 points) C = (11 to 15 points) D = (10 points or less)

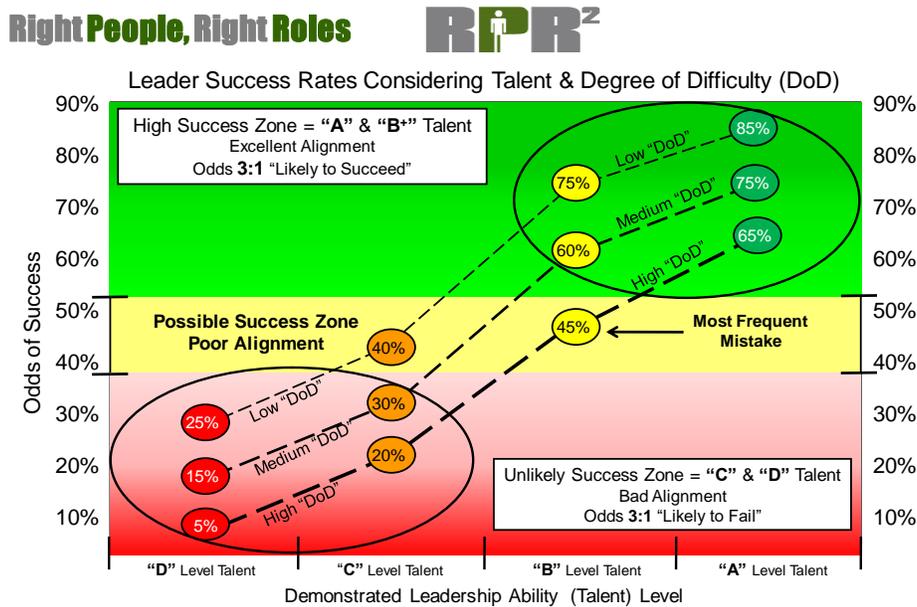
Reference # 1 = _____ Reference # 2 = _____ Reference # 3= _____ Reference # 4 = _____ Average = _____

Overall Leadership Rank (A, B, C, D) = _____

Section 3: Degree of Difficulty (DoD) or Complexity (High, Medium or Low).

Reference # 1 = _____ Reference # 2 = _____ Reference # 3= _____ Reference # 4 = _____ Average = _____

Relative Odds of success = _____ (Remember you are looking for probability > 60%)



Section 4: Overall Performance (outcomes or measurable results)

Excelling (3) _____ Succeeding (2) _____ Struggling (1) _____ Failing (0) _____

Reference # 1 = _____ Reference # 2 = _____ Reference # 3= _____ Reference # 4 = _____ Average = _____

Notes:



For more information, please contact us at: *Right People Right Roles* 877-582-8884,
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