
Competency

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“I know one when I hear one”: maximising the effectiveness of the telephone interview

Competency-based telephone interviewing can help improve the quality of shortlisting decisions, as Madeleine Owen and Tessa Webb show. They draw on their own experience to provide a best-practice guide to its effective use.

Competencies are now an established part of the human resource toolkit. Indeed, in many organisations, they have become embedded as the core framework around which all key people processes revolve. For example, by underpinning recruitment processes with a standard set of sought-after behaviours (competencies), HR professionals can help to ensure consistency, accuracy, reliability and fairness in the measurement of candidates' performance.

The interview is a most interesting selection tool because of its prominence in recruitment processes, and because its validity can be transformed if it is designed around relevant competencies. According to recent figures from the Chartered Institute of Personnel and Development (CIPD, 2004), 26% of UK employers now use telephone interviews as part of a screening process. Some organisations use telephone interviewing to assist with shortlisting, others to assess telephone skills where the role requires them. The telephone interview offers organisations real advantages in terms of the ease, speed and cost-efficiency with which high volumes of applications can be sifted. However, little is known about the effectiveness of telephone interviewing in comparison with the face-to-face interview. This raises the question: can telephone interviews achieve a reasonable level of accuracy?

INTERVIEWING BY PHONE OR FACE TO FACE?

When filling their vacancies, organisations almost always use a pre-screening process to ensure that the right calibre of candidate is put forward to the final, often resource-hungry, stage of a recruitment

process. An interview of some sort often forms part of this pre-screening process, so it is important that the interview represents both a reliable and a valid measure of candidate performance. Structuring an interview around the core competencies required for job success, standardising the questions, and applying a consistent rating scale, go some way towards achieving these goals.

Face-to-face interviews offer a number of key advantages for both the interviewer and candidate. A face-to-face interview allows the candidate and interviewer to interact in person, aside from discussing the role and asking the standard interview questions, communicating with both verbal and non-verbal behaviours. Research has consistently shown that non-verbal behaviour has an important influence on “accept” or “reject” decisions by both parties in an interview (Cooper and Robertson, 1995). An internal survey of professional recruitment consultants within Wickland Westcott has shown that non-verbal behaviours also provide useful clues about when a candidate is holding information back, or being less than open and honest in their answers.

From a candidate perspective, a face-to-face interview often fulfills their expectations of what a typical recruitment process involves, and can also provide the candidate with an opportunity to meet potential colleagues and get a feel for the work environment.

While there is much research to support the use of carefully designed and structured face-to-face interviews, few studies have examined the validity and reliability of structured interviews carried out over

1. A case study of telephone interviewing

For the past few years, Wickland Westcott has been working with one of the world's leading consumer goods organisations. The company operates a development programme for high-potential graduates within a distinct and growing sector of its European operations. The aim is to recruit outstanding talent into the organisation and offer these individuals an intense development programme to accelerate their progression to senior positions. The scale of the recruitment programme presents challenges for the organisation, given its desire to adopt an inclusive approach and gain access to all potential candidates across Europe. At the heart of this challenge is the volume of applications which must be efficiently and effectively assessed. We have worked in partnership with the organisation to develop a practical, cost-effective and accurate way to manage this process, including the development of a multimodal telephone interview.

With assessment centre places available for up to 75 candidates, and with more than 3,500 applications from across Europe being received, a practical yet cost-effective methodology was required to select candidates to attend. It was critical that these candidates were assessed accurately at the pre-screening stage against both the key competencies required for the programme, and the values of the organisation.

The multimodal telephone interview that we developed was divided into four parts:

- a Self-Assessment Questionnaire (SAQ), distributed pre-interview containing competency-based questions to which candidates prepare a written response for discussion with the interviewer;
- CV and career-aspiration questions;
- competency-based questions; and
- situational questions.

This multimodal approach allowed the interviewer to examine aspects of each candidate's CV in detail, and then to link their work experience to the competencies important for the role.

Advance preparation of the SAQ takes some pressure off the candidates. Having probed the candidate on these pre-prepared competency areas, the interviewer then builds on this with further competency-based questions. This question sequence enables candidates to build their confidence and become comfortable talking on the phone, before being challenged to think on their feet by answering unseen questions. The situational questions add a "realistic job preview" element to the interview, which can be particularly important on the telephone as candidates are otherwise not able to obtain this until they reach the assessment centre.

How successful was the telephone screening process? One in three candidates put forward to an assessment centre was successful and accepted onto the programme. This high success rate demonstrates that, in combination with other selection tools, a multimodal telephone interview can play a highly valuable and effective role in a selection process.

the telephone (these include Silvester et al, 2000). However, the use of telephone interviews is likely to continue to grow, due to the twin commercial pressures of globalisation (bringing in large numbers of applicants from diverse locations) and cost reduction. The telephone interview is therefore here to stay, and it is time to consider how to maximise its effectiveness.

A PLACE FOR THE TELEPHONE INTERVIEW

The limited research available suggests that there may be some benefits to telephone interviewing other than just its practicality. For example, Silvester et al (2000) suggest that telephone interviews may be more task-focused than a face-to-face interview. People conversing over the phone are less distracted by interpersonal factors, so are able to concentrate more on the content of what is being said. Recruitment decision-making, therefore, tends only to be based on the content of the dialogue, rather than being subject to biases such as appearance.

Research on face-to-face interviews backs this up, suggesting that it is the content and how it is said – the interviewee's verbal behaviour, in other words – that exerts the greatest influence on "accept" or "reject" decisions, rather than interpersonal, non-verbal cues (see Cooper and Robertson, 1995).

Therefore, the telephone interview has the potential to be a more accurate early measure of job-person fit, enabling the assessment of organisational fit to be made at a later stage, such as through a face-to-face interview or an assessment centre.

Consistency of application is as important in telephone interviewing as it is in face-to-face interviewing (Bryson, 2002). All candidates should be interviewed in a similar manner to maximise standardisation and fairness. Similarly, best-practice design principles remain the same. These include conducting an analysis of the key competencies required for success in the role, ensuring that consistent questions focusing on these competencies are asked of all candidates, and using a standardised rating scale for every interviewee (Keenan, 2000). This is all achievable over the telephone, as our own experience demonstrates (see the case study in box 1).

GUIDELINES FOR BEST PRACTICE

Our experiences in conducting both types of interview – by telephone and face to face – have led to the development of a set of

Telephone interviews

guidelines for conducting telephone interviews. They are intended to overcome many of the pitfalls associated with telephone interviewing. The 20-point guidelines are shown below.

Before the interview . . .

1. Clearly define the criteria to be assessed (eg, qualifications, work experience, competencies, values), ensuring that they relate closely to the demands of the role.
2. Identify standard questions and some follow-up probe questions to assess these criteria.
3. Define key behavioural indicators that candidates will be assessed against. Trial the interview structure with a mock candidate to check that it works.
4. Send candidates some of the competency-based interview questions in advance to allow them time to prepare their answers.
5. Choose a venue for conducting the interview that will be free from distractions for its duration – remind candidates that they should do the same.
6. Ensure that candidates are clear about the amount of time that they should set aside for the call.
7. If working internationally, take time differences into account when organising interview schedules.
8. Check in advance with candidates that they will be available on the agreed phone number at the agreed time.

During the interview . . .

9. Ensure that both parties can hear one another clearly – reschedule the interview appointment if this is not the case.
10. Be clear with candidates about what to expect, outlining the structure of the interview at the outset.
11. Explain that there may be periods of silence in which notes are being taken by the interviewers.
12. Pay attention both to what the candidates say and how they say it.
13. Obtain considered answers rather than immediate reactions; for example, encourage candidates to pause for thought before answering.

14. Show sensitivity to candidates whose first language is not English.

15. Use a combination of question types, such as CV-based, competency-based and situational questions to bring variety.

16. Follow the structure closely throughout.

17. Take clear, detailed interview notes that you can refer back to later.

After the interview . . .

18. Classify and evaluate the data gathered against each selection criterion.

19. Write up notes and make your evaluations as soon as possible after the interview.

20. Build evaluation time into your telephone interview schedule rather than scheduling interviews back-to-back. Bear in mind that if you undertake the evaluations at a later date, trying to recall who said what is much harder when you have not got a visual image of the candidate to act as a reminder.

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