



# Banking Customer Service Positions Semi-Structured Interview System



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## Conducting a Structured Interview

This interview guide was created for the client facing roles (loan officer, teller, personal banker, CSR, and Receptionist) at Farmers State Bank.

A structured interview is a tool used to standardize and establish consistency in the interview process. The interviewees are assessed on their competencies (clusters of knowledge, skills, abilities, and other characteristics necessary for the position) which will help hiring managers to compare candidates using the same information to ensure that there is no bias during the interview process.

The interview questions provided were written to target the specific competencies necessary to perform in customer facing roles at Farmers State Bank.

## The Interview Process

### Before

**Review** questions

**Plan** your follow up questions and prepare to take notes

**Choose** questions (amount may depend on the time that is available)

### During

**Welcome** candidate and give brief introduction to the interview process

**Ask** interview questions

**Use follow up probes** to get more information (using the same probes listed in the interview document will ensure consistency)

**Score** candidate using the Behaviorally Anchored Ratings Scale (BARS) provided

**Make effective use of time** – make sure you make it through all competencies

### After

Make any **final notes** Make sure all information and documentation are **organized**  
**Combine scores** - create final score by adding scores from each competency **Review** candidate

## Core Competency Model



It is important to be friendly and build some rapport. Some introductory questions are suggested to get the interview started. Use these below or choose your own.

### Introduction Questions

Tell me about yourself.

What made you apply for this job?

What qualities do you have that you think make you a good candidate for this position?

Interviewer: \_\_\_\_\_

Candidate: \_\_\_\_\_

Date: \_\_\_\_\_

## Competency: Navigating Problems

| <b>Definition:</b>        | Identifies solutions to problems with the available information, evaluates the cost/benefit of each solution, and pursues timely course of action despite obstacles or opposition. |  |
|---------------------------|--|--|
| <b>Questions:</b>         | Tell me about a specific problem you have experienced in a previous job.   | <ul style="list-style-type: none"> <li>• What barriers did this problem create?</li> <li>• How did you approach the problem?</li> <li>• Were you able to solve the problem?</li> </ul>   |
| Proficiency Rating        | Proficiency Definition   | Behavioral Example   |
| <b>1 - Unsatisfactory</b> | <i>Competency not demonstrated. Needs extensive guidance.</i>  | <ul style="list-style-type: none"> <li>• Candidate is unable to describe how they would diffuse the situation.</li> <li>• Candidate may become flustered.</li> <li>• Candidate does not know how to act.</li> <li>• Candidate could assist with the help of a manager.</li> </ul>    |
| <b>2 - Developing</b>     | <i>Can apply competency in simple situations. Needs close guidance.</i>  |  |
| <b>3 - Satisfactory</b>   | <i>Can apply competency in some situations. May need occasional guidance.</i>  | <ul style="list-style-type: none"> <li>• Candidate can describe basic steps to diffuse the situation.</li> <li>• If candidate is unable to diffuse situation, they may not go beyond to find a solution.</li> <li>• Candidate may need some help from manager.</li> </ul>            |
| <b>4 - Advanced</b>       | <i>Can apply competency in most situations. Requires little to no guidance.</i>  |  |
| <b>5 - Superior</b>       | <i>Can apply competency in all situations. Does not need guidance and can advise others.</i>   | <ul style="list-style-type: none"> <li>• Candidate can describe in detail the steps they would take to diffuse the situation.</li> <li>• Candidate could remain calm and collected.</li> <li>• Candidate would ensure the conflict was solved and customer was satisfied.</li> </ul> |

Interviewer: \_\_\_\_\_

Candidate: \_\_\_\_\_

Date: \_\_\_\_\_

## Competency: Taking Initiative

| <b>Definition:</b>        | Takes preliminary steps to do what needs to be done without outside direction, takes on responsibility without being asked, can accomplish goals independently, takes ownership of goals and projects when needed.   |  |
|---------------------------|--|--|
| <b>Questions:</b>         | <p>1. Describe a time where you were given little information regarding a project at work?</p> <p>What did you do to acquire the information you needed?</p> <p>Were you able to complete the project?</p> <ul style="list-style-type: none"> <li>•</li> </ul> | <p>2. Tell me about a time when you had little to no supervision on a work task</p> <ul style="list-style-type: none"> <li>• How did you approach the situation?</li> <li>• What might have been different if you had supervision?</li> </ul>  |
| Proficiency Rating        | Proficiency Definition   | Behavioral Example   |
| <b>1 - Unsatisfactory</b> | <i>Competency not demonstrated. Needs extensive guidance.</i>  | <ul style="list-style-type: none"> <li>• Does not seek out improvements to their workplace or task</li> <li>• Seldom takes responsibility for projects</li> <li>• Waits for direction to take action</li> <li>• Shows little enthusiasm for taking on additional responsibilities</li> </ul>   |
| <b>2 - Developing</b>     | <i>Can apply competency in simple situations. Needs close guidance.</i>  |  |
| <b>3 - Satisfactory</b>   | <i>Can apply competency in some situations. May need occasional guidance.</i>  | <ul style="list-style-type: none"> <li>• Frequently takes action to without having to be asked</li> <li>• Is able to produce quality results without direct oversight</li> <li>• Assumes leadership role when necessary</li> </ul>   |
| <b>4 - Advanced</b>       | <i>Can apply competency in most situations. Requires little to no guidance.</i>  |  |
| <b>5 - Superior</b>       | <i>Can apply competency in all situations. Does not need guidance and can advise others.</i>   | <ul style="list-style-type: none"> <li>• Seeks out their own ways to make improvements to outcomes, processes, etc.</li> <li>• Takes responsibility on without having to be asked</li> <li>• Can act without direct oversight</li> <li>• Provides leadership to others on projects and helps to bring them to successful conclusion</li> </ul> |

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