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Interview Design Example - Director of Operations

The purpose of the Interview Design Document is to create alignment within your hiring team and the reporting manager for this role. The hiring team is the people who will be working with you to interview for this role. This document should be completed in partnership with the other people who will be helping you'll want to align on not only the traits you're looking for, but how to evaluate those traits in an interview process, and choose three LinkedIn profiles to share as examples of the kind of candidates you're looking for.

One of the best ways to begin delivering an equitable interview process is to align on what is required and agree on how to evaluate it, before you begin talking with candidates. You want your hiring team to know exactly what they are looking for and deliver a consistent experience across the whole candidate pool they interact with.

0.0 ORGANIZATION

Job Title

> Director of Operations

Choose a title that is not only appropriate for the role, but is also searchable and standard enough that it will be familiar to talent.

Department or Team

> Operations

If you're unsure of the department, consult the most current org chart for the company.

Reporting Manager

> [NAME]

Who will this role report to?

1.0 HIRING PROCESS

It is important to have a diverse group of people on the hiring team, not only so that you gather a more diverse set of perspectives on each candidate. You also demonstrate to the candidates that it is important to you to have a diverse set of people involved in making hiring decisions.

Hiring Manager (*Who is responsible for the hiring process for this role?***)**

> [NAME]

Stage	Person who will be Responsible
Application Review with Questionnaire - virtual - 5 minutes	[NAME]
Supplemental Questionnaire - virtual - via email, this is sent out to anyone who looks qualified in the application phase. Questions are listed at the end of this job profile.	[NAME]
Vision & Values Screening Call - virtual - 30 minutes	[NAME]
Skills & Expertise Interview - virtual - 45 minutes	[NAME]
Technical Interview - virtual - 90 minutes	[NAME], [NAME], [NAME]
On-site Interview - 2.5 hours	[30 min] Site tour with [NAME] [60 min] Peer Interview with [NAME], [NAME], [NAME] [30 min] Direct Reports Interview with [NAME], [NAME] [30 min] Hiring Manager debrief with candidate (questions, selling points, etc.)
Benefits Review and Offer pre-negotiation - virtual	[NAME]
Reference Checks - virtual	[NAME]
Offer Process - virtual	[NAME]

Fill out who will be handling each stage of the Hiring Process

2.0 JOB DETAILS

Preferred Start Date

ASAP - Anticipated start date 2 weeks after the offer is issued unless otherwise negotiated

If this date is flexible, share a target start date, month or range.

Job Location and In-person Requirements

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> On-site or Hybrid with 3 days/wk on site

Include all possible options. Example: 2-3 days per week on-site in Burlington, MA.

Salary and Equity Range for the Role

> M3, Director, $XXX,XXX - $XXX,XXX

Include Pay Level if you have it. Example: IC 5 - Engineering.

Purpose of the role

> The Director of Operations is responsible for all of the general business operations activities for our small but growing team, including the following areas of activity:
>
> - Business Operations
>   - Lead initiatives to scope, build, and implement "next level" processes, tools, and workflows across all departments.
>   - Develop and track KPIs throughout the company. React to findings by collaborating with the necessary department leads to implement targeted improvements.
>   - Ensuring effective communications and information flow across the company
>   - Working effectively on interdisciplinary teams and building cross-departmental relationships
>   - Contract and deploy vendors, consultants, and fractional team members to address the company's operational needs
> - Office Management
>   - Building and equipment maintenance
>   - Procurement, including overseeing the manufacturing supply chain
>   - Inventory, including ownership of shipping and receiving
>   - Key Stakeholder: Finance. May require implementation of a new inventory system.
>   - Ensuring Company is following appropriate safety requirements and has the necessary permits to perform work
>   - Management of an operations team (initially expected to be 1-2 people)
> - People Operations
>   - Serve as a leader in people operations and contribute to scoping and implementing the company's people operations strategy
>   - Participate in shaping the culture of a growing company and helping strengthen that culture as you scale.
>   - Proactively integrating our company's values into our day to day operations to build a positive work environment

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- Finance
    - Work closely with finance team and contribute to scoping and implementing the company's financial strategy
- Leadership
    - Participate in leadership meetings with the leads of other company functions
    - As needed, interact with external stakeholders on behalf of the company (investors, customers)
    - Strategic planning for the company's operational needs, ensuring continued operational improvements and scalability
        - Proactively avoid "approval bottlenecks" by establishing a clear chain of command on all tasks

In a few sentences, describe what this new hire will be doing at a high level. Include any details about who they will be working with, both internally or externally that are not standard for a role like this.

What are the milestones or timeline for hiring this role based upon?

Systems are currently holding, but not sufficient for the next level of scale. Build infrastructure for our next stage of growth. Also need someone to stand up new ops areas that are not currently at the company. Building a sustainable organization for high growth over the next 18 months.

We need this person to start asap to free up the company leadership to do other work and improve the team's day to day.

Whenever possible, connect hiring this role with a timeline or concrete high-level milestones that the company has established.

What top level company goal(s) will this hire contribute to? How?

- Milestone 1: Scale business to be able to hit $20M in revenue next year
- Day to day
    - This person is going to have basically zero time to hit the ground running
    - Revenue growth and order fulfillment
    - Preparing for Series B by improving our systems
    - Ensuring we hire and retain top talent
    - Track KPIs and implement ops strategy to improve company efficiency

Whenever possible, include the annual operating goals that this person will be working on.

Instead of hiring someone for this role, could you reassign or train someone currently on your team? Why or why not? What work would you need to stop in order to do so?

> - No, we need someone who already did this. Someone who already went 5->50+ people in a startup, already has management experience, already has an ops track record.

What are the risks of not hiring for this role?

> - Our operations continue to be duct taped together, the team efficiency diminishes, poor communication leads to mistakes, team spending time in the wrong places
> - Can't hire/retain talent if the company is too disorganized and it's adding unneeded stress to their lives or causing burn out.
> - We've queued up growth, but we fail to deliver because the systems aren't in place. We shoot ourselves in the foot and miss our window.

What could go wrong if this role is not filled or if the wrong person is hired?

What outcomes would you expect a successful hire to achieve...
In three months...

Business Operations
- Work with the CEO to scope and complete an initial business operations project to address immediate company needs
- Document and take over existing business operations responsibilities
- Work with CEO and other company leadership to establish KPIs for business operations and set up a dashboard for analysis
- Work with founders & grant consultant to manage and oversee non-dilutive funding applications and projects

Office Management
- Build and manage a small operations team
- Support company's move and setup in a new East Bay facility
- Work with CEO and other company leadership to establish KPIs for lab and office operations and set up a dashboard for analysis

People Operations
- Complete the implementation of a full hiring and onboarding process with HR.

Finance
- Establish and roll out a budget system for each department with Finance

Leadership & Strategy

> - Fully oriented to the team structure, company systems and tools, strategic plan, and core technology.
> - Create a "map" of <u>internal</u> stakeholders and their operational needs. Create a 3 month, 6, month, and 12 month plan for prioritizing and executing operational improvements across the company.
> - Begin leading regular meetings to exchange ideas and provide project updates.

Example: Launched a cross-team project to improve how we prioritize tickets. Try to include at least three outcomes for each time period: three months, six months, and one year.

In six months...

Business Operations
- Own business operation efforts, including setting and executing quarterly goals that address critical business needs
- Create a set of dashboards that each department uses to track progress, iterate on processes, and communicate with stakeholders while reducing manual reporting burden.

Office Management
- Own all office operations, including setting and executing quarterly goals that address critical business needs
- People management running smoothly, with increased impact on goal-setting, empowerment, and performance management.

People Operations
- Participate in designing and executing the company's annual offsite
- Complete a people operations audit with HR

Finance
- Have clarity on the new runway/burn rate and begin planning for next fundraise, including alignment of internal revenue targets.

Leadership & Strategy
- Create a "map" of <u>external</u> stakeholders and their operational needs. Create a 3 month, 6, month, and 12 month plan for prioritizing and executing operational improvements across the company.

In one year...

- Company operations are Series B ready, this place is a well oiled machine

> - Excellent ability to recruit and retain top talent in a positive environment
> - Business operations have supported >2x y/y increase in sales
> - Company is equipped to deliver multi-million dollar orders next year

Working backward from the expected outcomes, what existing skills and knowledge would a successful hire need to have?

> - Build operations processes from scratch and evolve them as the organization evolves
> - Managing an operations team that can balance work streams across a wide variety of responsibilities.
> - Building and nurturing a team - the people side of management.
> - Ability to take initiative and make decisions
> - Factory familiarity (technical or operations experience), preferably including pilot or manufacturing-scale operations
> - Experience taking a team's operations from 5-50 people or 20-100 (or similar growth metaphor), but not necessarily a startup
> - Experience managing relationships with numerous internal and external stakeholders to strategically tackle problems
> - Breadth of operations knowledge, from HR to finance to facilities
>   - I don't expect this person to have total familiarity with every aspect of our operations since they are quite broad. But I need a very high percentage of "been there, done that" experience.
> - Ability to think holistically about company values and be able to create versions of processes and materials that reflect those values

Example: Advanced knowledge of project management software; skilled at giving clear feedback.

Add at least 8-10 unique requirements. Make sure to rely on criteria that reduce bias. Are these criteria truly needed to succeed in the role? (i.e. is a degree strictly required, or would commensurate experience suffice? How many years of past experience is truly needed? What is nice to have versus required?)

Not sure which criteria are needed? Interview people who excel in a similar role or the people who typically manage this role. Ask them about the skills and knowledge that are critical to their success. Interview people with diverse backgrounds and work styles to identify criteria that are actually needed for the role.

What 3-5 behavioral or personality traits are essential for someone to be successful in this role? Please describe the traits.

- No ego. This role will require working with internal and external stakeholders of all backgrounds, levels of experience, and areas of expertise. This role requires the ability to encourage a positive culture and seamless collaboration with everyone.
- Clear communication. The ability to read and write clearly are necessary, but so is the ability to listen to stakeholders, and the ability to know when and how to communicate information to the best effect.
- Disciplined with high attention to detail. That means they need to be self motivated, take ownership over things, get things done right, get things done on time. If something isn't going according to plan then revert to clear communication!
- Comfort in chaos. This person + some of our other initiatives will help us refine our company, but we are an early stage startup that is always doing too much with not enough time and resources. This role needs to function comfortably in the newness of the company while helping to develop sound structure and processes.

3.0 SKILLS AND EXPERTISE QUESTIONS

These questions are asked during the 45-minute "Skills and Expertise" interview with the Hiring Manager. They are designed to address the two or three biggest areas of critical need for the role. These critical skills should be deal breakers - as in, if the candidate doesn't have them, we will not consider them for the role. The hiring team will also align on what makes a satisfactory response or an exceptional response to the questions.

If you're wondering which qualifications are most critical, or higher priority than others, you can think about each area in terms of "learning risk" and "learning time." For instance, if a job requires a certain specific category of technical expertise and the candidate does not already have it, there would be a steep learning curve. It also would take them significant time to build depth of knowledge in an area. Therefore there would be a high learning risk and a long learning time for that candidate to gain that qualification. Whenever there's both high learning risk and a long learning time, it should be considered a critical qualification.

Critical Skill 1:

Build operations processes from scratch and evolve them as the organization evolves

What is the most important skill that we need for this role?

Critical Skill Question 1:

You join a 15-person technology company as the first operations hire. There's a lot of operations responsibilities spread out across different systems, infrastructure, and people in

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the organization. It's your job to streamline them. How do you approach this situation and come up with a plan?

What is the open-ended (How/What) question we can ask that will illuminate the candidate's level of expertise in this area?

Critical Skill Question 1 Evaluation Criteria:

Qualities of a satisfactory answer:
- The answer has some nuance related to our current situation.
- The answer is thorough and scaled to what we can accomplish.
- The answer includes information gathering, prioritization, and communication.
- The answer includes specific examples that they have seen be successful in other situations they have encountered.

Qualities of an exceptional answer (Everything in "satisfactory," plus):
- The answer is forward-looking and addresses a progression of things that we can do over time to build our capacity in this area.
- The answer puts their work in the context of the overall company goals and our mission.
- The candidate shares a response with us that expands the way we think about their role.
  - Note: A truly exceptional candidate will bring you insights in the interview process. This isn't a make or break requirement, but rather is something that tells you if you are speaking with an exceptional A-team player.
- The answer incorporates what they have already learned about our core values and mission in a way that feels creative and 'us'.

What qualities will allow us to categorize someone's answer as satisfactory, or exceptional?

Critical Skill 2:

Managing an operations team that can balance work streams across a wide variety of responsibilities.

What is the second most important skill that we need for this role?

Critical Skill Question 2:

How would you manage an operations team that is responsible for so many different and distinct categories of work - finance, people operations, production and facilities, and high-level company organization?

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What is the open-ended (How/What) question we can ask that will illuminate the candidate's level of expertise in this area?

Critical Skill Question 2 Evaluation Criteria:

Qualities of a satisfactory answer:
- The candidate is organized in their thinking.
- Their answer addresses both aspects of the question: building the team with different skills sets, AND how to manage that team.
- They demonstrate knowledge of the areas that this job will be responsible for.
- The candidate has a methodical approach to analyzing what needs to be done.
- The candidate demonstrates experience and skill in managing teams.
- The candidate incorporates robust communication practices into their answer.

Qualities of an exceptional answer:
- The candidate reflects on their own skills at time management and techniques they utilize to make sure that day-to-day work gets done, while keeping themselves available for triage "putting out fires."
- The candidate accounts for "return on investment" (bandwidth, cash, etc.) when scoping and prioritizing both their individual efforts and their team's efforts
- The candidate incorporates information about our vision and/or values into their approach to attracting talent and building their team culture.
- The candidate thinks holistically about the relationship between their team and the other teams at the company, and emphasizes the need for good communication and collaboration with those teams as well.

What qualities will allow us to categorize someone's answer as satisfactory, or exceptional?

Critical Skill 3:

Building and nurturing a team - the people side of management.

What is the third most important skill that we need for this role?

Critical Skill Question 3:

How do you approach building and nurturing a team? I'm particularly interested in what strategies you use to ensure effective communication, accountability, and development?

What is the open-ended (How/What) question we can ask that will illuminate the candidate's level of expertise in this area?

Skill Question 3 Evaluation Criteria:

Qualities of a satisfactory answer:
- The candidate demonstrates experience with hiring and managing a team in the past.
- The candidate mentions basic communication strategies, such as holding regular meetings or using reporting structures, but doesn't offer specific examples or other deeper approaches to ensure clarity and alignment.
- They refer to surface-level methods of holding people accountable through performance reviews or goal setting but don't describe how they actively coach or mentor people and empower them to do their jobs.
- The candidate emphasizes providing development opportunities like training or professional growth programs, but doesn't get specific about how they nurture autonomy and independence of their direct reports.

An exceptional candidate would go beyond basic competence and demonstrate deeper insight, strategic thinking, and leadership capability through their foresight, empathy, and a dedication to nurturing employees at every level.

Qualities of an exceptional answer:

- (Delegation and Empowerment) The candidate articulates how they not only delegate tasks but empower people to make decisions and take ownership of their work. They emphasize developing trust, autonomy, and accountability, ensuring that their team is effective.
- (Tailored Communication and Alignment) The candidate describes customized communication approaches based on the needs of individuals. They might explain how they align goals, foster cross-team collaboration, and ensure that their direct reports communicate effectively within their own team while also promoting transparency across the organization.
- (Developing their Leaders) The candidate demonstrates a clear commitment to developing leadership within their direct reports by discussing specific mentorship practices, coaching, or initiatives designed to cultivate decision-making, conflict resolution, and people skills.
- (Flexible) They provide examples of how they've adapted their management approach to meet challenges. The candidate demonstrates a flexible, solutions-oriented mindset, where they adapt strategies to ensure success and growth.

4.0 TECHNICAL ASSESSMENT

Depending upon the type of role and the level of experience required for the role, we will use different methods for assessing the candidate's ability to perform the role.

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What technical assessment will be used when interviewing for this role?

(90 minutes) Prior Work Presentation, accompanied by a Design Exercise in response to a take-home (to manager + subject matter panel)

Options include: Prior Work Presentation, Design Exercise, or Skills Demonstration.

If a Prior Work Presentation is being used for the technical assessment:
Create a brief that describes to the candidate what types of work they should speak about during their presentation.

Prompt for sending to the candidate once they have advanced to the Technical Assessment interview stage.

Please prepare a 15-20 minute presentation that covers your experience in building and managing a team in operations that worked cross-functionally within a small, highly technical organization to build processes and functions from scratch, scale or improve existing processes, and bring an operations perspective to high-level strategic decision-making. We'd love to see breadth across the relationship with R&D, manufacturing, facilities, finance, and program management. We'll be looking for detail on:

- Times when you built multiple operations processes from scratch
- Complexity of the projects managed
- Experience with a 50-100 person company or team
- Methods or approaches to managing a small team to accomplish big things
- How you have supported a company with the operations perspective for high-level strategic decision-making around product strategy or manufacturing scale-up.

After their presentation:

- Ask them about anything in the brief that they don't address in their presentation
- What are some key things that you have done to get better at building operations processes?
- What do you think are the most important things you need to be successful in this role?
- In what ways do you feel this job will support your career growth?
- How do you like to interact with your direct manager and peers around decision making?

After their presentation:

- *Ask them about anything in the brief that they don't address in their presentation*
- *Dig deeper on any topic that is of particular relevance to the role*
- *What are some key takeaways that you used to improve your methodology for (the work they talked about during their presentation)?*
- *What do you think are the most important things you need to be successful in this role?*
- *What types of professional development do you think are most relevant for someone in your role?*

If a Design Exercise is being used for the technical assessment:
Develop an open-ended exercise that requires the candidate to use the core skills to solve a problem and outline it here.

This is a design exercise for the candidate to work on prior to their Technical Interview.

Preparation (estimated preparation time = 60 minutes)
(This gets sent to the candidate once they have advanced to the Technical Assessment interview stage.)
- Please review the attached documents and come prepared to discuss. During our meeting you will have the opportunity to ask questions, but don't hesitate to reach out if you need additional information to prepare for our call.
- All materials can be found here [link to background documentation]
  - Attachment 1: Sales & Order fulfillment schematic. This outlines the high-level process that is used by our team today.
- Below we have included several representative prompts to facilitate discussion of the materials. These reflect the nature of the topics that we will discuss, however, this is not intended to be an exhaustive list and we will allow the conversation to flow organically.

Representative Discussion Questions (discussion time = 50 minutes)
- Process Improvements
  - What would you expect are the pain points in this process today? As we scale, what challenges would you expect this process might encounter?
  - What steps could you take to make this process more scalable over the next 6-12 months? What resources would you require to execute this plan?
- Strategic Planning for Commercial Scale
  - What operational challenges and risks do you foresee from an operational perspective? How can we mitigate these risks?
  - In the next 12-24 months we need to double our manufacturing capacity. What are the critical steps to ensure that our operations are ready to meet customer needs?
  - Are there any blind spots that we're missing as we plan for growth?

Things to consider:
- *The exercise should not have a readily available answer.*
- *The exercise should probe problem solving abilities and should not resemble an academic exam with right or wrong answers. However, the solution provided by the candidate should be able to be unambiguously measured in how well the problem is solved.*
- *The format and expectations of the exercise should give the candidate an opportunity to demonstrate their technical communications and critical thinking skills.*
- *Give the candidate guidance on: how long the task should take to complete, when it is due, the tools they can/can't use, and options for how to communicate their solution*
- *Create a standard list of follow-up questions that you will ask every candidate.*
    - *For example, if error analysis is a key skill, you could ask: "What are the sources of error in the measurement? How would you take this error into account during the design phase?"*
    - *Follow-up questions can expand on the exercise itself. For example: "How would you connect X measurement to Y performance parameter in our system"?*

5.0 ON-SITE INTERVIEW QUESTIONS
During the on-site interview, the candidate will have two sit-down interview segments:

- 60 minutes with a 3-4 person 'peer' group - not everyone in this group is a peer
- 30 minutes with a 1-2 person 'report' group - the folks in this group may or may not be direct reports of the role

Each person asks two questions per interview, giving about 5 minutes for each question, followed by the remainder of the time being used by the candidate to ask their questions. In preparation for the on-site interview, the interviewers should read through the resume and any supporting materials about the candidate.

Peer Group - Interview Questions

Facilities and equipment are listed in the job description, what are your lessons learned for how to manage these resources within a Quality Management System: What are best practices and what are things that might go wrong?
Supply chain, shipping and receiving are listed in the job description, what are the communication structures that would you establish to make sure good planning and decision-making can occur between different groups and departments that these areas cross into? What and how can things go wrong?
How could you improve communication between departments and help ensure customer needs are met?

What are your approaches to conflict resolution between departments?
What role has technology played in improving operational efficiency in your previous roles and how do you evaluate the ROI of these technology investments?
When you have an employee that has been underperforming for the past six months after years of strong performance, how do you approach getting them on the right track?
Tell me about a time when you had to introduce, or significantly impact facility or office safety. What was the situation and did you go about planning and executing the changes?
Describe a time when you convinced your peers or supervisor to support a proposal or idea. What was your communication strategy, what worked, and what didn't?

Report Group - Interview Questions

What experience do you have with small start-ups moving into a phase of growth, and what infrastructure needs to be in place for that growth to be successful?
Do you have experience with the maintenance of critical analytical equipment? If so, could you give an example of a maintenance plan you set up or oversaw and the impact on the scientists that used the equipment?
What experience do you have with quality standards such as [relevant quality standard]? If the candidate does not have experience with them, ask about the ones they do have experience with.
Since production materials tracking is an important component of certification, how would you track our materials at this startup growth stage where an excel sheet is woefully inadequate, and an MRP/ERP system is overkill?

6.0 SAMPLE PROFILES

Share three LinkedIn profiles of people who exemplify the type of qualified candidate you're looking for, and write a sentence including a few specifics about why they were chosen.

[LinkedIn Profile]
[LinkedIn Profile]
[LinkedIn Profile]

7.0 POST-APPLICATION QUESTIONNAIRE

Due to the volume of applicants a post-application review questionnaire may be needed.

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Answer each of the following questions in one paragraph or less. If you do not have experience in the stated category, please mark N/A.

- What is the largest team you managed, and for how long? What was your team responsible for?
- How many years do you have with facilities operations, either working in or managing? What were you responsible for?
- Do you have startup experience? How small was it when you started, and what were you responsible for?
- How many years of experience do you have with People Operations? What were you responsible for?
- How many years of Business Operations experience do you have? What were you responsible for?
- If you've led Business Operations in a team of 50+ (or Series B+) with complex, simultaneous projects, please describe the level at which you contributed (e.g. Were you the primary owner/decision maker?), operational needs solved for, descriptions of what you implemented (e.g. processes, documentation, tools).
- What single professional accomplishment are you most proud of?

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