Hiring Guide: Account Executive

Everything You Need to Hire Great Talent

What's Included in This Guide?

1. **The State of Hiring:** How behavioral interviews help address some of the challenges facing HR professionals as they recruit talent today
2. **Behavioral Interviews 101:** What are they? Why use them? Tips and tricks
3. **How to Evaluate:** Tips on evaluating behavioral interviews
4. **Summary Job Description:** A sample job description for the Account Executive role, including:
    - Job summary
    - Responsibilities
    - Competency names, levels, definitions
    - Knowledge Areas
    - Education
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5. **Interview Questions:** 5 Behavioral interview questions related to job requirements
6. **Interview Guide Rating Scale:** Description of each level of the rating scale
7. **Summary Interview Rating Sheet:** Summary sheet to pull all competency ratings together

State of Hiring

Hiring has undergone a fundamental shift in recent years, as companies are finding it more difficult to fill key positions with the right people.

A number of trends have contributed to this shift. The modern workforce is far more transient than generations past, so organizations are putting more emphasis on recruiting their next great candidate than developing them from within.

It has gotten so out of control, that according to the Bureau of Labor Statistics, 95% of external hiring is done to fill existing positions due to people voluntarily leaving. And this shortage of candidates has left HR in a difficult situation.

Talent is likely to be the main driver of business success in the coming years, and HR needs to drive a strategic hiring process that actively seeks out candidates with the right competencies to support the achievement of business goals.

The best way to explore a candidate's skill-set and fit with a particular job is using behavioral interviewing techniques.

Read on to find out how behavioral interview questions can help you make better hiring decisions and get the tools you need to hire your next top candidate!

Behavioral Interviews 101

Behavioral interview questions (also known as competency-based interview questions) are designed to elicit information about the candidate's past experience and accomplishments that relate to the competencies required in the target job.

The Goal: Behavioral Examples

Knowing a candidate's actions is of little use if you do not understand the circumstances surrounding the actions and the results produced by those actions. To fully understand a candidate's past behavior, make sure to explore the following three components in order to make an informed judgement about whether the candidate has displayed the level and quality of behavior required:

- The **Situation or Task** in which the candidate was involved;
- The **Action** which the candidate took to complete the task or address the situation; and,
- The **Result** of the candidate's action.

When the information provided by a candidate addresses all three areas, then the information is called a **behavioral example**.

Deciding What to Evaluate:

When selecting the competencies to evaluate during an interview, it is important to consider two factors:

- What competencies are included on the competency profile for the target job?
- What other assessments methods will be used during the selection process?

A competency profile — *the collection of competencies used together to represent the most critical aspects of a job* — typically contains seven to ten competencies covering both the behavioral (soft-skills) and the technical requirements of the job.

It can be overwhelming to ask questions addressing every associated competency, so we recommend asking no more than five questions during a standard interview. This means that you will need to select the five most critical competencies to focus on for the interview.

For this interview guide, we have included five questions that provide coverage across the soft skills and technical requirements for the job.

If you will be including other aspects in your interview process, like a simulation or work samples, you may find that technical competencies are more easily assessed by those means.

What to Watch Out For

When interviewing candidates, be careful not to let candidates provide **false behavioral examples**, which can be misleading. There are three common types of false behavioral examples to look out for:

Theoretical or Future-Oriented Statements:

1

These statements indicate what a candidate thinks they would do, not what they have done, and provide no information about past behavior.

False Behavioral Example:
"I would make sure the client received the support needed to ensure on-time delivery."

Behavioral Example:
"The client needed extra support to ensure their shipment arrived on time. To help with this, I made sure I understood when the shipment was required, I coordinated with the production and shipping departments on my end, and as a result, everything was delivered on time."

Feelings or Opinions:

2

These statements are simply an individual's emotional reaction to a situation or event, and provide no insight into behavior.

False Behavioral Example:
"I am really good at teaching myself new software packages."

Behavioral Example:
"When I joined ACME Corp, they used a CRM that I had never used before. With no internal resources available to train me, I was able to learn the tool using online tutorials and videos. I became so well versed in the product, I ended up the go-to internal expert."

Vague Statements:

3

These are typically summaries or descriptions of several past actions reported in a general way, requiring you to probe further.

False Behavioral Example:
"I always had the customer's best interest in mind and never got pushy or argumentative."

Behavioral Example:
"As an Implementation Specialist, I always had the customer's best interests in mind. In one situation, a client was feeling pressured to purchase an upgrade. I stepped in to ensure our team understood the client's needs. Although the Sales Rep was angry with me for stepping in, I explained the client's perspective and got everyone on the same page. Three months later, the client upgraded anyway."

The Structure of Behavioral Interview Questions

The interview questions included in this guide are all structured in the same format. Each question applies to the specific competency being evaluated. Follow-up questions are included to help you probe further into a candidate's past experiences, and behavioral cues are provided to illustrate examples of what to look for in a candidate's answer.

Question 1: Creativity and Innovation — Level 3

Generating viable, new approaches and solutions.

Competency name and definition

Question:

Describe the most complex problem that you were faced with and how you generated a new approach or explanation or solution.

Job specific question

- What was the problem?
- What was complex about it?
- What new approach or explanation did you come up with?
- What was new about it?
- How did this benefit your work (or the work of others)?

Probes to help elicit greater specificity from candidates

What to look for:

Identifies new approaches.

- Creates new ideas, solutions or approaches to ongoing challenges.
- Uses unconventional areas as sources of inspiration and insight into new options and solutions.
- Solves complex problems through developing new explanations or applications.

Behavioral indicators to look for the specific competency at the required level of proficiency

1	2	3	4	5
Well Below Standard	Below Standard	Meets Standard	Above Standard	Well Above Standard

Rating scale *(See Appendix A for details)*

How to Evaluate the Interview

All of the energy and effort devoted to capturing good job-related information during the selection interview will be lost if this information is not evaluated consistently for all candidates. Use the following instructions to evaluate candidate information from a behavioral interview.

Step 1: Classify All Behavioral Examples

Each behavioral question is designed to elicit information relevant to a **specific competency**.

However, candidates may provide information that goes beyond the specific competency, resulting in one of the following situations:

- A question will be asked focusing on one competency area, but the candidate provides a behavioral example that demonstrates another.
- Examples are provided that relate to more than one competency area.
- Examples that relate to the required competencies will be provided during the introductory phases of the interview, or during the close of the interview.

The whole interview should, therefore, be reviewed carefully for evidence of the competencies being assessed.

Tip

When reviewing a behavioral example given by the candidate, make clear notes along-side the example the competency actually demonstrated.

This can then easily be cross referenced in the section of the Interview Guide devoted to that competency.

Step 2: Weigh the Behavioral Examples

The next step is to weigh each example in terms of its overall contribution to the rating for each competency. This is not simply a process of averaging all of the positives and negatives to arrive at an overall rating. The following factors should be taken into account:

- **Significance:** The importance of the examples provided should be carefully considered. If the candidate provides two examples, one from a trivial situation, and one from a situation that had significant impact, the example with greater importance should be considered more significant.

- **Recency:** The more recent the behavior, the better it predicts future behavior. If the candidate provides a number of negative examples of a competency earlier in their career, but also provides several more recent positive examples, then the recent examples should be given more weight in the overall rating of the competency, other things being equal.

- **Trends:** Consistent with the concept of recency, examples which show a trend either positively or negatively should be taken into account. It is likely that a trend would continue if the candidate were selected for the target position.
- **Job-Relatedness:** How closely related is the behavioral example to the job that they are interviewing for? In cases where the candidate gives more than one example, the most relevant behavioral example to the job they're interviewing for should be considered most significant.

Tip

When assessing relevance, carefully consider the situation.

A candidate may provide good examples of team building skills in volunteer situations involving children, but a number of negative examples with adults on the job.

Although volunteer experience is perfectly acceptable, the latter examples must be given more weight if the candidate is expected to demonstrate this skill with adults on the job.

Step 3: Assign a Rating to Each Competency

The next step is to assign a rating to each competency based on the candidate's demonstration of the relevant behavioral indicators.

Tip

When running a panel interview, have each interviewer complete a summary interview rating sheet to save time when reviewing results.

A summary rating scale is provided in Appendix A.

Job Description: Account Executive

Job Summary

The Account Executive maintains the relationship between the customer and the company, and strives to build new business wherever possible.

Job level: Individual Contributor

Responsibilities

Account Management & Business Development

- Close sales to new accounts to meet revenue and sales growth targets
- Develop sales strategies, sales plans, and forecasts, and maintain sales funnel
- Manage opportunities through the sales cycle and close new business to increase revenue
- Manage an end-to-end sales pipeline from new customer identification through to sales closure
- Develop and maintain strong business relationships with customers and business partners
- Negotiate and structure sales agreements with new and existing customers
- Meet regularly with the sales manger to update sales forecasts
- Maintain a high level of new business productivity through acquisition of new clients
- Follow up on leads to create sales opportunities
- Locate new business opportunities to supplement existing pipeline

Competencies

Account Management (Level 3)
Building long term, value-based relationships with accounts, developing business and maximizing the revenue they generate while reducing the time and costs in managing them.

Client Focus (Level 3)
Providing service excellence to internal and/or external clients.

Collaborating with Others (Level 3)
Working together with others in a cooperative and supportive manner to achieve shared goals.

Managing the Sales Process (Level 3)
Following the organization's sales methodology in applying skills and resources to achieve sales targets.

Fostering Communication (Level 2)
Listening and communicating openly, honestly, and respectfully with different audiences, promoting dialogue and building consensus.

Knowledge Areas

- Customer Relationship Management (CRM) Software (Intermediate)
- Microsoft Office Suite (Intermediate)
- Software as a Service (SaaS) (Intermediate)
- Salesforce (Intermediate)

Education

- Business and Commerce (University certificate below bachelor level) **or**
- Business Administration (University certificate below bachelor level) **or**
- Marketing and Sales (College diploma)

Certification

- Certified Sales Professional (CSP) **or**
- Certified Professional Sales Person

Account Executive Interview Guide

Candidate: ______________________________

Interviewer: ______________________________

Date of interview: ______________________________

Question 1: Account Management — Level 3

Building long term, value-based relationships with accounts, developing business and maximizing the revenue they generate while reducing the time and costs in managing them.

Question:

Describe a situation where you managed an account through the sales pipeline from proposal to implementation.

- What was the situation?
- What was your role and responsibility?
- What did you do?
- What pipeline management tools were used?
- What was the outcome of your work?

What to look for:

Applies the competency in the full range of typical situations, requiring guidance in only the most complex or new situations.

- Generates revenue by developing business relationships with customers through telephone and face-to-face meetings.
- Controls revenue by maximizing profits through pricing strategies, margin control and mitigating customer loss.
- Manages sales pipeline from the proposal stage through customer acceptance and implementation.

1	2	3	4	5
Well Below Standard	Below Standard	Meets Standard	Above Standard	Well Above Standard

Notes (Situation, Action, Results):

Question 2: Client Focus — Level 3

Providing service excellence to internal and/or external clients.

Question:

Clients' needs are not always clear. How have you helped a client in the past to determine what resources or services they needed to address their situation?

- Describe the client's situation.
- What kind of help did the client require in determining their needs?
- How was the client able to make use of your ideas?
- How did this help the outcome of the client's project (or situation)?

What to look for:

Provides added value.

- Looks for ways to add value beyond clients' immediate requests.
- Addresses the unidentified, underlying and long-term client needs.
- Enhances client service delivery systems and processes.
- Anticipates clients' upcoming needs and concerns.

1	2	3	4	5
Well Below Standard	Below Standard	Meets Standard	Above Standard	Well Above Standard

Notes (Situation, Action, Results):

Question 3: Collaborating with Others — Level 3

Working together with others in a cooperative and supportive manner to achieve shared goals.

Question:

Describe a situation where you recognized others for their contributions to a project.

- What was the situation?
- What was your role?
- What did you do?
- What was the outcome?

What to look for:

Fosters collaboration.

- Gives credit and acknowledgement for contributions and efforts of others.
- Provides constructive feedback to others.
- Helps build consensus among members of groups.
- Provides opportunities for all group members to contribute to group discussions.

1	2	3	4	5
Well Below Standard	Below Standard	Meets Standard	Above Standard	Well Above Standard

Notes (Situation, Action, Results):

Question 4: Managing the Sales Process — Level 3

Following the organization's sales methodology in applying skills and resources to achieve sales targets.

Question:

Tell me about a situation where you adapted the company's sales process to fit the size and type of the customer.

- What were the circumstances?
- What did you need to accomplish?
- What did you do that was different?
- How did this work out?
- What did you learn from it?

What to look for:

Applies the competency in the full range of typical situations, requiring guidance in only the most complex or new situations.

- Evaluates the effectiveness of the sales process to recommend improvement.
- Facilitates/leads the sales process by mapping it to customer responses.
- Adapts the organization's sales process to the size, type and style of customer.
- Utilizes customer profile information to develop account strategy and relationships.
- Deploys all available resources to maximize both organization return-on-investment and customers' desired financial results.

1	2	3	4	5
Well Below Standard	Below Standard	Meets Standard	Above Standard	Well Above Standard

Notes (Situation, Action, Results):

Question 5: Fostering Communication — Level 2

Listening and communicating openly, honestly, and respectfully with different audiences, promoting dialogue and building consensus.

Question:

Give us an example of a time when establishing two-way communication with an individual or group was especially challenging.

- What was the situation?
- What made it challenging to establish two-way communication?
- What did you do to help ensure that communication was two-way vs. one-way?
- To what extent were you successful in your communication efforts? What leads you to say that? (i.e., on what evidence do you base that evaluation).

What to look for:

Fosters two-way communication.

- Recalls others' main points, taking them into account in own communication.
- Checks own understanding of others' communication (e.g., paraphrases, asks questions).
- Elicits comments or feedback on what has been said.
- Maintains continuous, open and consistent communication with others.

1	2	3	4	5
Well Below Standard	Below Standard	Meets Standard	Above Standard	Well Above Standard

Notes (Situation, Action, Results):

Appendix A: Interview Guide Rating Scale

Level	Description	Weight
Well Below Standard	Falls significantly below requirements. Evidence of candidate's demonstration of the competency is far from adequate in all or most respects.	1
Below Standard	Below expected requirements. Evidence of candidate's demonstration of the competency is inadequate in key respects.	2
Meets Standard	Meets requirements. Evidence of candidate's demonstration of the competency meets expectations and reflects an adequate ability to perform; candidate may have demonstrated minor weaknesses in some aspects of the competency, but non of major significance.	3
Above Standard	Exceeds requirements. Evidence of candidate's demonstration of the competency is above average and reflects more than an adequate ability to perform; all or most aspects of the competency are demonstrated at an above average level.	4
Well Above Standard	Significantly exceeds requirements. Evidence of candidate's demonstration of the competency is exceptional and reflects superior ability to perform; all aspects of the competency are demonstrated to a high degree.	5

Appendix B: Summary of Interview Ratings

Candidate:

Position:

Date of interview:

Interviewer:

Competency	1 Well Below Standard	2 Below Standard	3 Meets Standard	4 Above Standard	5 Well Above Standard
Account Management	☐	☐	☐	☐	☐
Client Focus	☐	☐	☐	☐	☐
Collaborating with Others	☐	☐	☐	☐	☐
Managing the Sales Process	☐	☐	☐	☐	☐
Fostering Communication	☐	☐	☐	☐	☐

Recommendation:

☐ Continued Consideration ☐ Reject

General Comments:

About HRSG

For three decades, HRSG has delivered products and services to define talent needs, address skill deficiencies and improve individual and organizational performance.

Our Products division has distilled that 30 years of expertise into a competency, job description and career management software solution. Leveraging the power of AI, CompetencyCore™ is unlike any other product on the market, bringing together the power of competencies and the utility of job descriptions.

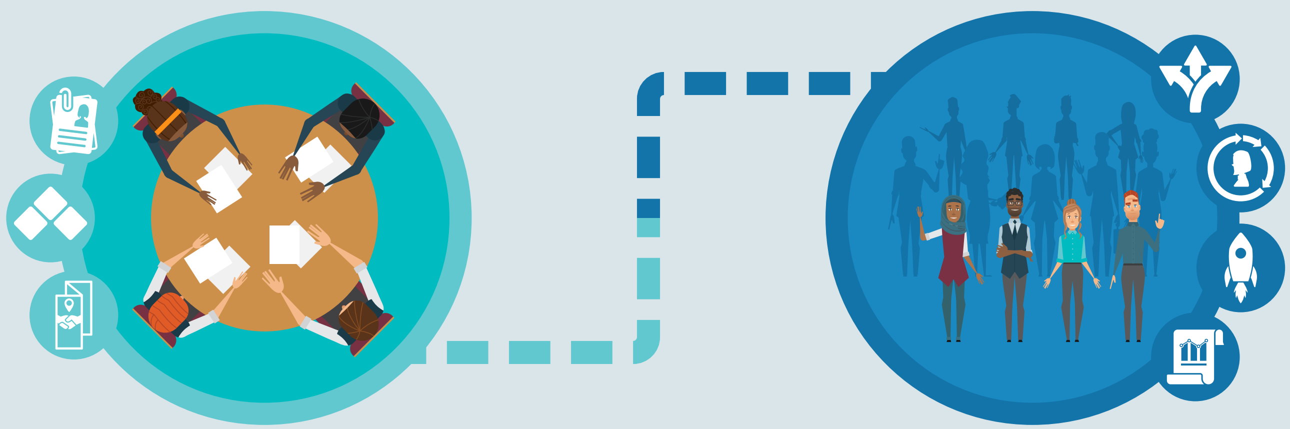
Our Talent Management Solutions division delivers best practice professional services in competency-based management, testing and assessment. In addition, we train HR professionals worldwide in our competency-based management methodologies.

COMPETENCYCORE

CompetencyCore by HRSG makes use of our exclusive **Smart Job Description Technology** to power every stage of the employee lifecycle through competencies.

Start with *Mapping* to map your jobs and competencies, then add *Navigating* to engage your employees.

MAPPING **NAVIGATING**



Use Smart Job Description Technology to unify your company's **job descriptions**, **competencies** and **interview guides**.

Empower your talent with career management software that offers competency-driven **career pathing**, **assessment**, **development** and **insights**.

See it in Action

Schedule a live demo to see the easiest way to start using behavioral interviewing across your organization.

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