About This Document

owner	HR
access & use	All Staff
what it is	A comprehensive list of over 135 sample questions for conducting reference checks
who uses it	HR, Managers, and Staff involved in checking references.
used with	◆ *CR-ALL-2820-M. Reference Check Form*

Introduction

This reference document contains example questions to help you avoid 'blank-page syndrome' when it's time to prepare for a reference check.

⚠️

If you require support or guidance to conduct reference checks, please contact CUSTOMIZER: Insert the title of the contact (not the name). Example: the HR Manager.

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- 22 HR topics

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Warming up

1. Would you please provide an overview of his role and his main responsibilities?

2. Would you share with me his reason for leaving?

3. If you were to create the perfect position for him, what would it look like? Also describe the company culture and the people around him.

Position-Specific Technical Skills

4. What would you say were his most significant wins in the role?

5. Describe for us the biggest challenge he faced in this role. How did he overcome or address it?

6. What would you say was his biggest disappointment in the role?

7. Did he work in an environment where he frequently worked alone?

8. What tasks did he enjoy most in the role?

9. What tasks did he enjoy least in the role?

10. Did he have a strong understanding of the sector, its challenges, and its opportunities? Was he well connected in the sector?

11. How would you rate his business acumen in the role? (For Assistants) For example, did he pre-read materials before his manager's meeting, highlight key points, and then brief his manager on the topic?

Note: *Create specific questions related to the experience and technical skills required for the position.*

Work from Home Questions

12. Did your company transition into a remote workforce during the pandemic?

13. Was he provided with a work-from-home allowance or company-paid equipment?

14. How much experience does he have working from home?

15. Was his home workspace inspected and approved for WCB requirements for safety?

16. How would you rate his success level in working from home? Zero to Ten. Ten being perfect.

17. What are some difficulties that may have arisen from his working from home? Some examples:

    a. Space or home environment not conducive to blocking out distractions.

    b. Upload and download speed that affected productivity or web conference stability.

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Creativity

28. Describe the most unusual or creative idea he came up with.

29. Think back to his most recent projects or assignments. What was one of his biggest breakthroughs? What was involved and why did you consider it a breakthrough?

30. What was his most innovative solution to a challenge his team or department was facing. (Probing: What was the challenge? What role did he play in the team? How did his efforts compare to others on the team?)

31. Would you consider him an efficient worker? Did he ever come up with a more effective and efficient process?

32. Did he take the time to be creative or innovative with his approach to his role?

Adaptability/Flexibility

33. Would you say your company environment was unstructured or structured? Did he work well within that environment?

34. Can you describe a time when he made a decision on an important issue, problem, or situation that differed from what was originally agreed upon? (How did he approach you about his change in decision? Did it work out for the better/worse? Was he given more or less authority going forward?)

35. Did he have to take direction from, or report to more than one manager on a regular basis? What worked? What didn't?

36. Did he have any assigned projects that needed to be completed very quickly, with little or no information or direction? Did he successfully complete the assigned projects? Why or why not?

Communication

37. How would you rate his ability to keep others regularly informed on a project or initiative? (How did he keep others informed? Do you feel he communicated effectively?)

38. What was the most sophisticated and/or challenging audience he had to face? (What did he speak about? Who was his audience? How did he prepare? Was the outcome successful?)

39. How would you rate his written communication skills? (Clear? Professional? Able to get his point across?)

40. What was the most significant or creative presentation he created?

41. How well does he communicate when there is existing conflict with the other person?

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56. Has he ever made a decision that, in retrospect, may not have been the best? If so, what might he have done differently?

57. How would you rate his ability to make an immediate decision when he may not have all the information needed, or the ability to access the resources and/or stakeholders needed? (Can you provide an example? What was the outcome? Do you think he could have done anything differently?)

58. Can you recall a time when he made a risky decision—one that was either outside of the box, did not have a lot of support, or was made with minimal information? (Was it successful? Why or why not?)

59. How would you rate his ability to use SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis to help make a decision or create options?

Problem Solving & Analysis

60. Tell me about a time when he had to solve a particularly challenging problem. What steps did he take to analyze the cause of the problem? How did he obtain the information to solve the problem? How would you rate his ability to make a decision based on the acquired information?

61. Can you remember a time when he found a simple solution to a complicated challenge?

62. How would you rate his ability to acquire systematic data and accurately provide and evaluate an overall analysis?

63. How would you rate his analytical skills? Can you provide an example of a time when he used his analytical abilities?

64. How would you rate his ability to amass a significant amount of data and thoroughly analyze it?

65. Can you recall a time where his analysis of a problem was incorrect? Why or why not? What was the outcome?

66. Has he ever identified a problem that had previously been overlooked?

67. How would you rate his ability to handle a difficult customer service experience—perhaps an angry or irate client/customer? (Can you recall a time when his customer service and problem solving skills were put to the test? How did he handle the situation? Was it successful? Why or why not?)

Strategic Focus

68. What was the most strategic initiative he worked on? What was his involvement?

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82. Does he ask for assistance when unsure of a task, or when he is overloaded? Can you recall a time when he should have asked for assistance, but didn't?

83. Describe the system he used for keeping track of multiple projects. (How did he track his progress to meet deadlines? How did he stay focused?)

84. It is often difficult to get work done because we habitually spend much of our time in the 'urgent and important' quadrant. Can you provide an example of how he ensured that work that was important, but not urgent, was organized, planned, and executed (making progress on a long-term project, for example).

85. (For Assistants). How would you rate his ability to execute and complete action items in an effective and efficient way? Did he close all the loops on action items? Can you recall a time when he did not follow up on an unresolved or incomplete important action item?

Staff/Change Management & Operations

86. Did you ever conduct a 360 degree review? If so, what 3 words would be used by his direct reports to describe his management style? What are his top 2 behavioral traits (not technical skills) as a manager? What would his direct reports say is his 1 area for improvement? (Probe here and ask for examples.)

87. Did he ever have to make the decision to let someone go? (Without providing confidential details, would you describe the situation? Was the direct report provided with feedback and a plan for improvement before the termination?)

88. Did he ever deal with a difficult termination? How was it handled? Was it done compassionately?

89. Did he ever wait too long to terminate, or avoid dealing with a performance challenge from one of his direct reports?

90. Does he know when it is appropriate to proceed directly with a termination instead of a performance improvement plan?

91. How would you rate his ability to provide a direct report with difficult feedback regarding their behavior or performance? How would you rate his ability to implement a performance improvement plan?

92. Can you recall a time when he challenged an existing approach/work practice and was met with resistance to his proposed course of action by his team? (Could you please outline what he did to move past the resistance and achieve the desired results?)

93. How would you rate his change management skills? Can you recall a time when he had to convince others in the organization of the value of moving forward on a particular higher risk initiative? Was the outcome successful?

94. How would you rate his mentorship abilities?

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decision with little or no input from others? Can you provide an example when he made a decision with significant input from others?

112. Did he ever have to quickly execute on an initiative that was not popular with staff, and in a situation when there wasn't enough time to get buy-in from staff? How would you rate his ability to execute on this?

113. Describe a situation in which he had to convince others in the organization of the value of moving forward on a higher risk initiative. How would you rate his ability to influence?

114. How often did he approach work matters with passion and conviction?

Emotional Maturity/Self-Reflection

115. Describe his relationship with the most difficult person he had to work with?

116. How would you rate his emotional intelligence?

117. Can you recall a time when he lost his cool at work? How was it handled?

118. How would you rate his level of assertiveness? 1 to 10 — 1 being not assertive at all, and 10 being aggressive and dictatorial. Can you recall a time when someone in the organization did not take well to his level of assertiveness?

119. Did he ever have to handle a difficult ethical situation?

120. How would you rate his ability to read people or a situation well? What about being politically astute?

121. What was his pet peeve at work? What annoyed him?

122. What happens when he has to work with someone who does not have the same sense of urgency as he has, or who may not be as 'talented'?

123. How did you know when he was stressed?

124. Tell me about a personal trait that posed some challenges for him at work.

125. If he were to enroll in a personal self-improvement course, what course would it be?

126. If he were to teach a personal self-improvement course, what course would it be?

127. How would you rate his sense of humor at work?

128. What would he say is his least favorite trait in a manager?

129. What would he say is his top-rated trait in a manager?

Past Performance & Feedback

130. In his last performance review, what was your overall feedback?

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Closing it Out

149. Why should we hire him?

150. Would you hire him back? Why or why not?

151. What would he be able to bring to the position that another candidate may not? What would you say is his competitive advantage?

152. What advice would you give his new manager to get the best out of him? What should we make sure we do, and what should we avoid?

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