

## **2. Understand the Job You Are Trying to Fill**

To hire the best person for the job, you must know what the job requires. It is a good idea to conduct a job analysis of the position you are hiring for. If you *really* want to be ahead, conduct an analysis of every position within your organization. Spending the time on job analyses can save a lot of time and money down the road by providing you with:

- Accurate job descriptions
- Hiring ad material
- Interview questions
- Performance evaluation checklists
- Data for training needs
- Data for organizational planning

You can create your own job analysis, or you can use one of the many tools that are packaged and available today. Depending on the tool or method you use, you can spend 3 hours or 3 weeks on a job analysis. (See Appendix A.)

Determine the needs of this position from as many perspectives as possible—don't be fooled into thinking you know everything about the position unless you have worked it recently. There is great value in keeping current with those who have direct contact with the person in this position. Not only are you gathering information in order to accurately place a new hire, you are also giving a voice to those within your organization who would like to see something change within the position.

### **Process for Job Analysis**

The job analysis process involves the following steps:

- A. Involve the key players.** These include top performers who already fill that position, managers, supervisors, and Human Resources. Getting feedback from all of these people will help you get an accurate idea of what it takes to be successful in the position.
- B. Establish core areas.** These are the major responsibilities of the position.
- C. Identify task list.** These are the specific tasks associated with each of the core areas.
- D. Gain agreement.** The key players need to agree that the analysis you have determined is accurate, thorough, and representative of the requirements and needs of the position.

For example, let's say you are a financial institution seeking to fill a financial planner position. With your key players in the process, you might break down the main responsibility or core areas like this:

Core 1: Product Knowledge
Core 2: Process Knowledge
Core 3: Sales Knowledge
Core 4: Compliance and Regulatory
Core 5: Interpersonal Skills
Core 6: Administrative

Next, establish the necessary tasks for each one. This is an abbreviated sample to give you an idea.

<b>Core Area</b>	<b>Tasks</b>
Product Knowledge	Understand specific features and benefits of life insurance contracts. Understand specific features and benefits of managed investments. Understand specific features and benefits of fixed and variable annuities. Use Investmentview™ to research investment products. Use Foresight™ to research insurance products.
Process Knowledge	Apply tax strategies Suggest appropriate retirement plans/accounts Recommend appropriate college savings Recommend appropriate form of ownership Understand proper use of wills, trusts, estate planning techniques
Sales Knowledge	Identify prospects Approach/open with client Conduct needs analysis Present findings Close the sale
Compliance and Regulation	Know laws and regulations for conducting business Submit all sales material to Compliance for approval prior to use Maintain records for all client accounts Copy all correspondence Prepare for audits and reviews

Core Area	Tasks
Interpersonal Skills	Utilize presentation skills Communicate ideas effectively Utilize listening skills to determine customer needs and wants Maintain good working relationships with supervisor and co-workers Maintain positive attitude Use PowerPoint™ to deliver client seminars
Administrative	Execute timely correspondence Complete relevant forms and applications Utilize effective time management skills Provide necessary documentation to financial product providers Resolve service issues for clients

As you are identifying core areas and tasks, also take an inventory of the specific technical skills the position requires. For example, in the above task list, this person would either need to know the specific software program or would need to be trained in it. These details are helpful when writing job descriptions or job advertisements.

Lastly, gain agreement from all those involved. Use this process as the basis for your employee search and incorporate it into your hiring system.

**3. Conduct Structured Interviews**

An unstructured interview is where you come to the interview with an idea of what you’d like to find out, but nothing is formalized or systematic. A structured interview is where you have very clearly identified questions, both in content and form, that are asked of all the candidates alike. Recruiting and hiring specialists find that structured interviews are far more valuable and give better information than unstructured interviews do because they rely less on instinct and more on data.

**4. Use Behavioral Interviewing**

Behavioral interviewing is based on the idea that the best predictor of future work performance is in past performance. This method of interviewing has been found to be extremely effective by hiring managers because it focuses on the candidate’s ability to do the job rather than his or her ability to get the job. In the behavioral interview, the interviewer asks the candidate to recall specific examples from his or her past work experience. After the candidate provides an answer, the interviewer asks the candidate to detail the specific steps or actions they took and the corresponding results.

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