White Paper

How to Create an Interview Scorecard

INTRO

When it comes to interviewing candidates for a position, all too often the final determination comes down not to objective facts, but to gut feelings and impressions left by the interview. This leads to candidates who might be charismatic and charming but underperform at their job when technical tasks and computers – which can't be charmed – come into play.

More than that, gut feelings can often involve internal biases that even the interviewer is unaware of. Maybe the interviewer has had a bad experience with a brunette woman in the past and now feels less good about hiring another brunette, even though there's no conscious thought behind it. This kind of systemic bias can be minimized or even eliminated with the use of an interview scorecard.

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What Is an Interview Scorecard?

So what is an interview scorecard? In short, it's a form that each interviewer fills out for each candidate, with objective (and potentially subjective) categories that are then rated on a numeric scale.

Let's say that you have three interviewers performing each interview. A scorecard is given to each of them, and a fresh card is used for each new candidate as they are interviewed. Thus, for each candidate, there are three sets of data points that you can then use to rate and rank each candidate.

Interview scorecards are generally a spreadsheet with four columns. The first column is the category of information. The second category is a summary of what you're looking for as an answer from the candidate. The third category is a summary of the candidate's response to the question. The fourth category is a numerical rating, typically on a scale of 1-5 or 1-10, depending on how many candidates you have and how granular you want to make the rating process. The numerical rating is a measurement of how well the candidate fits the role you're looking for.

As such, an interview scorecard will differ for each different position you're hiring for. A scorecard for a middle manager in your finances department will look dramatically different than one for an IT worker or a C-level.

What Categories Your Scorecard Should Include

As we just mentioned, the different categories you include in your scorecard will vary based on the position. However, some broad categories are the same across different scorecards. Here's a general overview of what you might expect.

Job Title: This scorecard entry will have the specific job title you're hiring for, and will ask the candidate what previous job titles they've held that qualify them to hold this one. Someone who has held the same job title in the past will get a higher score than someone with a merely related job title, or a job title a tier lower than this one.

	Looking For	Candidate Qualities	Score (1-5)
Job Title	Web Developer	Talented, 5 years exp.	5
Role Deliverables			
Long-Term Goals			
Tools/Techniques			
Experience			
Portfolio (Optional)			
Character Traits			
Work Style			
Career Trajectory			
Soft Skills			
Culture Fit			
Areas of Concern			

For example, if you're looking to hire an IT Manager, someone who has been an IT Manager in the past would get a 5/5, someone who has been an IT Supervisor might get a 4/5, and someone who has been an IT Administrator might get a 3/5. Someone with IT experience but no role beyond worker might get a 2/5, and someone with no previous IT experience in a formal work setting might get a 1/5.

Deliverables: This category includes the main tasks a person in your open role will be asked to complete and deliver on time.

	Looking For	Candidate Qualities	Score (1-5)
Job Title	Web Developer	Talented, 5 years exp.	5
Role Deliverables	Custom web apps	Several apps in AppStore	4
Long-Term Goals			
Tools/Techniques			
Experience			
Portfolio (Optional)			
Character Traits			
Work Style			
Career Trajectory			
Soft Skills			
Culture Fit			
Areas of Concern			

This can be anything from "digital assets" to "financial reports" to "employee satisfaction" and is highly customized to the role. Here, the candidate would be asked if they've delivered these kinds of things before, and how familiar they are with doing so.

Long-term Goals: This category talks about what the person in your role will be asked to do long-term, not as short-term deliverables.

	Looking For	Candidate Qualities	Score (1-5)
Job Title	Web Developer	Talented, 5 years exp.	5
Role Deliverables	Custom web apps	Several apps in AppStore	4
Long-Term Goals	Redesign website	Can redesign in WordPress	5
Tools/Techniques			
Experience			
Portfolio (Optional)			
Character Traits			
Work Style			
Career Trajectory			
Soft Skills			
Culture Fit			
Areas of Concern			

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This can include things like "redesign our company website" or "audit our financial situation" or "manage employee satisfaction to achieve an overall increase in production." Many resume items will cite past experience with long term achievements in this vein and is a good way to ask candidates about that experience.

Tools, Techniques, Programs: This category is focused on the tools and techniques the candidate will be asked to use in their role.

	Looking For	Candidate Qualities	Score (1-5)
Job Title	Web Developer	Talented, 5 years exp.	5
Role Deliverables	Custom web apps	Several apps in AppStore	4
Long-Term Goals	Redesign website	Can redesign in WordPress	5
Tools/Techniques	Photoshop, Cod...	Has full adobe suite & more	5
Experience			
Portfolio (Optional)			
Character Traits			
Work Style			
Career Trajectory			
Soft Skills			
Culture Fit			
Areas of Concern			

Things like proprietary software, industry software, or specific tools should go here. A machining expert should have experience with CAD software and a CNC machine, an MRI tech should be familiar with MRI machines and control software, and a web developer should be experienced with platforms like WordPress or languages like HTML5 and CSS.

Experience: This is a more free-form category where you work with your team to come up with signs of past experience that would be beneficial.

	Looking For	Candidate Qualities	Score (1-5)
Job Title	Web Developer	Talented, 5 years exp.	5
Role Deliverables	Custom web apps	Several apps in AppStore	4
Long-Term Goals	Redesign website	Can redesign in WordPress	5
Tools/Techniques	Photoshop, Cod...	Has full adobe suite & more	5
Experience	3+ years exp	Has over 5 years exp	5
Portfolio (Optional)			
Character Traits			
Work Style			
Career Trajectory			
Soft Skills			
Culture Fit			
Areas of Concern			

For example, if you are hiring a web developer, you might want to ask them for any previous projects where they've completed a website redesign, designed a new site from the ground up, or improve an existing site. Marketers might be asked about their profits and growth over a year. Benchmarks go here.

Portfolio: This isn't relevant to every position, but where it's relevant, it's hugely important.

	⇕ Looking For	⇕ Candidate Qualities	⇕ Score (1-5) ⇕
Job Title	Web Developer	Talented, 5 years exp.	5
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Long-Term Goals	Redesign website	Can redesign in WordPress	5
Tools/Techniques	Photoshop, Cod...	Has full adobe suite & more	5
Experience	3+ years exp	Has over 5 years exp	5
Portfolio (Optional)	Need to see mul..	Has designed dozens of ..	4
Character Traits			
Work Style			
Career Trajectory			
Soft Skills			
Culture Fit			
Areas of Concern			

When hiring for a creative role, the best candidates have relevant portfolios to show off. Less ideal candidates may have portfolios that show off relevant technical skills but not the specific kind of project, while poor candidates have no portfolio to show off at all.

Character Traits: This category focuses on interviewer impressions of the candidate. You will want to confer with your hiring team to develop a list of traits that you find desirable in your candidates.

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Tools/Techniques	Photoshop, Cod...	Has full adobe suite & more	5
Experience	3+ years exp	Has over 5 years exp	5
Portfolio (Optional)	Need to see mul..	Has designed dozens of ..	4
Character Traits	Works well with...	Ha worked with teams, ...	5
Work Style			
Career Trajectory			
Soft Skills			
Culture Fit			
Areas of Concern			

It might include things like creativity, adherence to guidelines, problem-solving ability, self-motivation, time management skills, and so on. Work with your hiring team to develop questions to ask that will showcase these skills, and note down your impressions of what the candidate has or lacks.

Work Style: This is another subjective category. You should use this category to judge how the candidate typically works. Are they a lone wolf and work best on their own?

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Tools/Techniques	Photoshop, Cod...	Has full adobe suite & more	5
Experience	3+ years exp	Has over 5 years exp	5
Portfolio (Optional)	Need to see mul..	Has designed dozens of ..	4
Character Traits	Works well with...	Ha worked with teams, ...	5
Work Style	Focused, able..	Specializes in completin...	4
Career Trajectory			
Soft Skills			
Culture Fit			
Areas of Concern			

Are they a team participant, working best as part of a greater machine? Are they a rockstar, able to produce stellar results but with their quirks that make their actions difficult to follow? Do they leave tasks for the last minute, or push to get them done as soon as possible?

Career Desires: This category asks you to develop an idea of what you want the candidate to do. Sometimes you may be hiring a candidate for a single project, and plan to release them when the project is complete. Sometimes you may have an open role on an ongoing basis, and don't plan to give the candidate room for advancement. Sometimes the opposite is true; you want to use the role to get the feel for a candidate and how they would perform if they were promoted above that station.

	⇕ Looking For	⇕ Candidate Qualities	⇕ Score (1-5) ⇕
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Tools/Techniques	Photoshop, Cod...	Has full adobe suite & more	5
Experience	3+ years exp	Has over 5 years exp	5
Portfolio (Optional)	Need to see mul..	Has designed dozens of ..	4
Character Traits	Works well with...	Ha worked with teams, ...	5
Work Style	Focused, able..	Specializes in completin...	4
Career Trajectory	Ambitious. Looki...	Wants to run the web de...	5
Soft Skills			
Culture Fit			
Areas of Concern			

This category should try to match the candidate to your desired path. If the candidate is just looking for a stable role and has no plans to try to work their way up the corporate ladder, that can still be fine, as long as you aren't expecting more out of them.

Soft Skills: Soft skills are skills that are important to a role, but are harder to test for. Instead of something like "proficiency with CSS" for a web developer, it might be "communication" or "collaboration." You're looking for skills that make a candidate work best in a role.

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Character Traits	Works well with...	Ha worked with teams, ...	5
Work Style	Focused, able..	Specializes in completin...	4
Career Trajectory	Ambitious. Looki...	Wants to run the web de...	5
Soft Skills	Communicative,...	Loves turning products in...	4
Culture Fit			
Areas of Concern			

Communication is a good soft skill for any candidate. Collaboration is a good skill for those who will be part of a larger team or who will have to work with other teams throughout your organization. Time management can be important for roles where the main deliverables come in at a quarterly rate, rather than daily. Self-motivation can be important for those who will work from home or without much supervision. Again, work with your team to develop the specific skills you want to look for here.

Culture Fit: Some companies pride themselves on particular aspects of their company culture. It might be political bias. It might be a level of comfort with coworkers, or a level of sociability. It might be a certain kind of sense of humor. This is one of the more subjective categories, and it's also difficult to look for in an interview where the candidate is likely both nervous and trying to show their best impression, rather than how they will perform their day-to-day activities. Remember, though, that some categories are protected, and you can't ask about them in an interview or make a hiring decision based on them.

Areas of Concern: This category is one you can develop with your team to look for particularly important red flags that could disqualify a candidate. We don't mean something like "doesn't have the relevant skills", as that is covered by other categories. This is more things like "fails to dress appropriately for an interview" or "was fired from their previous job for unexplained reasons". You know; things that would mean you'd have to watch the employee more than normal, or have cause to distrust them.

Potential Strengths: This category is the opposite of the previous category. Is there anything about the candidate that doesn't fit in another category, but which stands as a benefit to them? Most candidates should have nothing to add to this category (if you've developed your other categories properly). Someone that does might have specific industry awards or accolades, a recommendation from someone you trust, or another strength going for them.

Using an Interview Scorecard

The ideal way to use an interview scorecard is to start one for each candidate when you decide to give them an initial interview. You should also have a team of interviewers, either all working together for each interview or running different stages of the interview process.

For example, you might start a scorecard with an in-person or phone interview conducted by a single hiring manager. This manager fills out the card based on the phone interview. Then, each candidate that makes it through this screening interview to an in-person interview (or a second phone interview) will have their card passed to another hiring manager for a second look. This manager makes additional notes and gives their own numeric impressions.
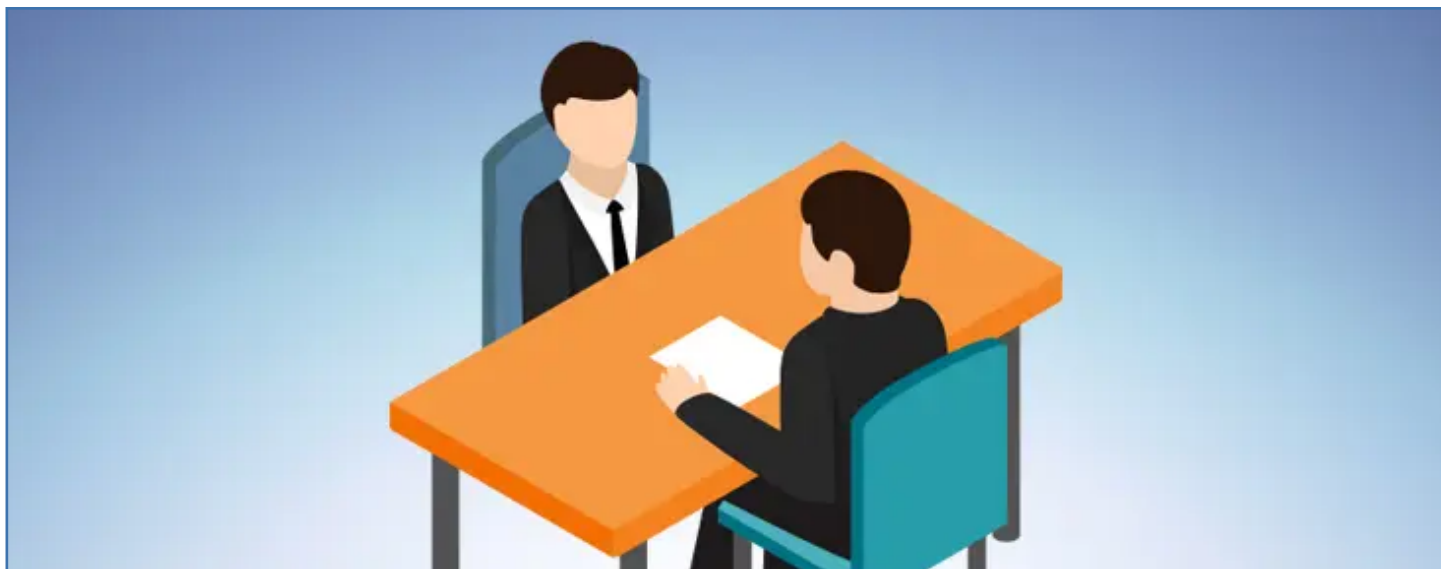
In-person interviews should have 1-3 hiring managers, or 1-2 hiring managers and a relevant manager for the position the candidate will be applying for. In the case of a role-specific manager, they might not know what to ask for hiring questions in general, but they will have a much better grasp of the techniques and technical requirements needed from each candidate and can note strengths and weaknesses than an HR employee might miss.

At the end of the hiring process, the scores from each manager can be tallied up, and any extraneous notes about special accolades, strengths, or red flags can be noted. With the data before you, you can make a decision to hire any particular candidate.

Templates

You can find templates for scorecards in a few places online.

- One example is:
  https://hbr.org/2016/02/a-scorecard-for-making-better-hiring-decisions

- Another can be found on:
  https://www.accolo.com/blog/using-an-interview-scorecard-to-streamline-interviewing/

- Other templates can be found on
  https://www.smartsheet.com/interview-templates

Our template might look something like this:

	Looking For	Candidate Qualities	Score (1-5)
Job Title			
Role Deliverables			
Long-Term Goals			
Tools/Techniques			
Experience			
Portfolio (Optional)			
Character Traits			
Work Style			
Career Trajectory			
Soft Skills			
Culture Fit			
Areas of Concern			
Strengths/Accolades			
Additional Comments			

You can copy this table into your own spreadsheet, give it any fancy formatting you desire, and print out copies for each interviewer who performs an interview with a given candidate. Keep each scorecard from each interviewer in that candidate's file, and tally up the numerical scores and notes when it comes time to make a decision.