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Session 90TS
Effective Interviewing "I Know in the First Two Minutes…"

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Summary: This session is designed to teach participants some of the most effective interviewing techniques available.

We address three important questions that ensure a good hire:
- *Is the applicant able to do the job? Many stop here if they believe the answer to this question is yes.*
- *Is the applicant willing to do the job? Willing and able are two very different things!*
- *Will the applicant be manageable once on the job? A person may be willing and able, but if they are not manageable, they could be your worst nightmare.*

Having the ability to appropriately address these three issues will empower the interviewer to rely less heavily on their sixth sense and having to know "in the first two minutes of the interview" whether the candidate is right for the job.

Ms. Lisa F. Tourville: This session is being sponsored by SOA's Management and Personal Development Section. I work for United Healthcare in Minneapolis, where I'm director of healthcare economics. Aimee Kaye, president of Actuarial Careers, Inc., and I are here to talk about interviewing. We're going to hit on the basics of interviewing, things to look for, and how to be prepared. Aimee will talk about the job description itself and how that will be a great indicator on whether or not you are prepared and what kind of person you are looking for.

"I knew in the first two minutes of the interview that they were right for the job." I know we've all heard that several times, whether it's two minutes, five minutes, or 10 minutes. How many times have you said that and, most importantly, how many times were you right? I'm not here to tell you that you need to spend six to eight hours in an interview in order for it to be effective or to truly guarantee a good hire. If you can prepare and plan for the interview, depending on the level of the position you're trying to fill, a couple of hours can be sufficient, as long as you get the information that you need out of it.

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†Ms. Kaye, not a member of the sponsoring organizations, is President of Actuarial Careers Inc. in White Plains, N.Y.

Note: The job descriptions referred to in the text can be found at the end of the manuscript.

What's the recipe? Ask yourself the right questions prior to having anybody come in. Once they're in, ask them the right questions at the right time, and you'll see what I mean a little bit later. Most importantly, listen to their answers. Listening is critical in virtually every aspect of our business these days.

Ask yourself the right questions. Is the department living up to my expectations? Has the company made any changes? Is there any reason I should be looking to change the structure/make-up of my department? Do I need an analyst or data entry clerk? I have $120,000 in my budget, should I go out and look for one person who's at the $120,000 level; or should I be out looking for three to four people in the $30,000 to $40,000 range?

Asking candidates the right questions. Are they able, willing, and manageable? You want to get the answers to those three important questions. Ability is not enough. You need to dig much deeper and figure out if they will be willing once they're on the job as well as if they are manageable. People who are willing, able, and unmanageable will bring the morale down in your department faster than most anything else will.

Listen closely to their answers. "To eat these things, said my uncle, "you must exercise great care. You may swallow down what's solid, but you must spit out the air." Dr. Seuss happened to have been referring to popovers, but I felt this fit pretty well in an interviewing situation.

As you're listening to the answers that the candidate is coming up with, listen for your next question. You can mold virtually every answer he or she gives you into another question. Of course, you could exhaust the subject, so you want to make sure that you stop when it's appropriate. Listen for patterns. Things will repeat themselves. I have had the benefit of starting up a new department in the last six months where I was able to hire five brand-new people. As a result, I've had some recent hands-on experience and it's been extremely interesting.

I had a person who came in who had 10 jobs in the last 15 years. I thought that was odd but their experience fit my opening extremely well. I felt I should at least talk to this person. I got on the phone and went through the employment history. I asked the reason for leaving each position and company. Every answer had something to do with the prior bosses. "They didn't know how to manage. They were too busy taking care of other areas of the company." Here was a definite pattern.

Listen for *how* things are said. If they are describing certain functions that they used to do, are they excited, bitter, or angry? It may tell you what you have to look forward to should you hire these people.

Also, look for what's not being said. People will often leave out some of the most important things because they don't want you to know. You need to try to determine, while you're moving along, if you think something is missing and try to get it out of them.

To effectively interview you should understand your needs, plan your method of recruiting, select the resumés whose authors you'd like to interview, strategize the interview, and outline your questions. However many resumés you receive, you'll have to weed some out and strategize how you're going to move from there. Do you have a specific interview style you're going to use? Are you going to stick with it? Are you going to blend different interview styles? Do you want to have a phone interview first and then the face-to-face?

Outline your questions. Lots of people skip the outline and think it's really not necessary. It is very valuable and I just can't emphasize that enough. If you have something in front of you with ideas of the types of questions you want to ask, you will more than likely follow that and you will add several things. Based on other things that are said, more questions will pop up. It's extremely valuable. You need to be prepared.

Understand your needs. Aimee is going to get into this in a lot more detail, but, most importantly, develop a job description and think long-term. The definition of long term has changed quite drastically.

There was a study done by the U.S. Bureau of Labor Statistics in February 1998. It indicated that the median number of years people have been with their current employers is 3.6 years (3.5 for finance, insurance, and real estate and 4.8 for managerial and professional). It's pretty scary to look at the way the job market is these days. Try to think how long the person will be with you and how much time it takes to train him or her.

One thing I found helped a great deal is to have all the people who are currently in the department, who don't already have one, write a job description for themselves. You can look through those. You'll see that a lot of the responsibilities are repeated from person to person. And there will, most likely, be functions that vary from person to person. Review them and ask yourself if there are gaps. What am I missing? Should I fill that gap with the next person that I hire?

You want to list the major functional responsibilities of the vacant position and the critical skills necessary to perform each function. Determine the educational background necessary to do the job. I think this is an interesting point. If you're looking to hire an actuarial position, obviously you want to look for a mathematics, statistics, or business background. However, for a lot of positions out there having a college degree can be an indicator that the person is trainable and has determination. This assumes you have good training programs. It may not matter what the degree is in.

Know what depth of experience you need. There are people out there with four years of diversified experience. They rotated from function to function, department to department every year. There are others who have been at a company for 10 years but have repeated the same year of experience 10 times. The person with four years of the diverse experience could be more valuable and add balance to the department.

Where to look when recruiting:

1. Inside. If you have a large enough company, you have a pool to choose from. Going inside can be one of the biggest morale boosters around. It can show people there is an option to move up and an opportunity for growth. Many companies are too small and don't have that pool of talent to choose from.
2. The grapevine. You have lots of friends, lots of co-workers, different companies, and the actuarial phone lines. Give people a call; drop an e-mail: "Here's what I'm looking for. Does anybody know somebody who might be interested?" It's amazing what you can come up with.
3. Newspaper ads.
4. Association and trade publications. The SOA has a web page where they're now putting out job postings. I've found it pretty interesting to look at what's out there.
5. Radio.
6. Job fairs, college fairs, and city and statewide fairs.
7. Government. This is a pretty interesting one. I was reading an article once about the type of people who end up applying for unemployment insurance at some point in their lives. Most government unemployment offices now automatically put people's resumés out on their government job posting Web site. There can be some pretty good catches out there on the unemployment line, though not for long.
8. Employment agencies. Aimee could probably talk to you a little more about that. However, in today's job market, beware of the candidate who is paying the employment agency. Enough said.

Resumés

"Look for the cracks and remember that what is not there can be revealing as what is." Yes, it's still a negative statement, but at the same time it's pretty realistic. People do not put things on their resumés they don't want you to know. Be careful.

There are several different resumé styles out there:

1. The functional resumé. These focus on major skills and specific accomplishments. They can be quite confusing to decipher. They don't provide any kind of chronological job history. These are accomplishment-driven.
2. The broadcast letter. This is intended to wow you with a handful of action-packed sentences intended to grab you and pull you in. Some of the users of the functional and broadcast letters could be job hoppers. They don't want you to see their history. It could also be somebody who's very capable, but who has gaps in their employment for a very good reason—one that you would find acceptable. They could also be very high-level executives. The unfortunate thing about these two types of resumés is that they require a great deal more research time on your part.
3. The chronological resumé is the most common. It's a straightforward chronological history of a candidate's employment. It generally includes promotions.

The most valuable resumés I found are those that combine all of these styles. Not only do they tell me exactly where the candidate worked and what his or her responsibilities were, but they also tell me what he or she accomplished while on the job. A lot of people tend to save the accomplishments for their cover letter, which is fine, too.

Now I'd like to mention a couple of things to be aware of on resumés. Is anyone familiar with the Apollo Syndrome? That's where a person was working at Cape Kennedy on the first Apollo mission and stated on his or resumé that he or she provided key support to top scientists. Well, as it turns out, the person actually served coffee. If something doesn't sit quite right with you, dig a little deeper.

Watch out for the use of action verbs. If they say "I managed," ask what they managed. People? Projects? Did they hire and fire? Did they perform job reviews?

Next are educational claims. You do have to be careful what questions you ask. We'll touch a little on discrimination later on. If they attended an institution that you've never heard of, you're just not familiar with it, and you're a little suspicious, ask a few questions. Did you live on campus? Did you live off campus? What part of the city was it in?

Finally, outdated resumés. It would behoove you in every situation, even if it's only been two months since you received the resumé, to ask if there have been any updates. Many things can change in a matter of weeks in the employment history. Get the most updated information possible.

The next step is to plan the interview. Determine what kind of interview style you're going to use. Is there a set style that you're comfortable with or will you use a combination? After the interview style is determined, the next step is the personality profile. Are there certain personality traits that are important to you? What are they?

The third step in planning the interview is determining question types. What am I going to ask? How will I drive the conversation? Finally, there is administrative preparation for the interview. These are a couple of things to do ahead of time before the person actually comes in for a face-to-face interview, and I will explain all four aspects of the interview.

Interview Styles

In my research I have run across four different interview styles: situational, personality profile, stress, and behavioral. The first is situational. The premise is the closer you get to a real work situation, the better your evaluation will be. These could be hypothetical. I'm sure we all use them, e.g., "What would you do in a given situation?" You can also set up physical examples. Have a report that has some blatant errors on it. Put it down in front of them and ask them to look through it. See if anything catches their eye. Is there a function that they could attempt to perform by spending a couple of minutes at someone's computer to see how they handle it?

Personality profiles help you find key personality traits important to the success of the job. Stress interviews are pretty tricky and tough. They are negatively based. They're intended to catch the candidate off-guard and. Are they mature? Can they handle a pressure situation? Are they poised? Can they handle quick thinking?

Finally, there's behavioral. This is the premise that past behavior will predict future action. A lot of kids coming out of college these days are trained for interviewing and I've seen several different techniques. One is called the STAR technique. If they are thrown any behavioral type of question, they are trained to define the situation, task, action, and result. I've heard the same basic strategy defined as SBO, situation behavior outcome. What was the situation? What did you do about it? What was the result?

My preference of interviewing styles is to use all of the above. I like to evaluate the behavior, gather a personality profile, weigh emotional maturity and judgement, and determine manageability.

Personality Profile

Here you would define key personality traits to consider and evaluate during and after an interview. There are personal, professional, and business traits. Personal can reveal basic character. It's a personal portrait that can broadly affect various aspects of any job. Professional traits are those that will reveal loyalty to a cause, the department, and the company. They'll speak well of the person's reliability. Business traits show if the person understands that the ultimate goal of the company is to make money.

I recommend you determine the personality traits that are important to you and model your interviewing questions around them.

Personal traits include drive, motivation, communication, chemistry, energy, determination, and confidence. Drive is the desire to get things done. Motivation includes looking for new challenges with enthusiasm. Communication questions if they talk, write, and express themselves. Chemistry. Not just how do they get along with people, but do they pull others along with them? Do they have a good attitude? Do people look up to them? Can they motivate others? Determination—Would they back off when the going gets tough? Finally, are they confident? Are they poised and friendly? Are they honest? But at the same time, do they know when they can't give out confidential information?

Professional traits include reliability, integrity, dedication, pride, and analytical and listening skills. Reliable people will follow up on themselves. They won't rely on others to make sure that their work gets done. People with integrity take responsibility for their own actions, whether they're good or bad. Dedication is committing to see a project through on time. The difference between dedication under professional and determination under personal is someone with determination will make sure the job gets done. Someone with dedication will make sure it gets done on time and will take pride in what they do.

Business traits include efficiency, economy, procedures, and profit. Efficiency means they're keeping an eye out for wastes of time, efforts, and energies. Economy is knowing the difference between expensive and cheap, such as supplies, seminars, etc. If they have to make 100 copies, they'll take the time to figure out what's the best way to do it and cost the company and the department the least amount of money. Procedures—they know they're there for a good reason. They'll follow them. If they feel that there's a procedure that should be changed, they'll try to change it in the correct way. Finally, profit. Again, they know why we're here.

Types of interview questions. We'll start with closed-ended questions. The only answers are yes or no. There are times when you may want to ask a closed-ended question: "Did you pass exam 150?" Yes or no? "Do you have your ASA?" Yes or no? There are times when they might not be so valuable. "Can you work in a pressure situation?" Realistically, who's going to say no in an interview? Open-ended questions—demand an explanation. The candidate can't just say yes or no. He or she needs to add something to it. "How do you succeed in working under pressure?" as opposed to, "Can you work under pressure?"

Behavioral. Again, the past can predict the future. "Tell me about a time when you had to work under pressure? Give me an example." Negative-balanced questions: "Tell me about a time you had to work under pressure and things didn't work out quite so well." Now there may be certain situations where you get an answer to something that disturbs you. It's possible it could be a pattern and you want to look into it further. Here's where you can use the negative confirmation. "Are there other examples of times when you had to work under pressure and things didn't work out so well?" Try to establish if there's a pattern.

Then we have reflexive. These are geared to close topics and move on. Their reflex is to agree with you. "I think we've talked enough about your ability to handle pressure. I think we should move on to the next topic. How do you feel about that?" Again, what are they going to say? Their reflex is to agree with you. These are especially valuable if you're having trouble keeping the candidate on the subject.

There are mirror statements. The candidate makes a statement, and again, it's a little bit unsettling to you. Repeat it back to them and pause. You're looking for them to add more information. "So you said the report would have gotten out on time had you done things differently?" Pause. Let them add something to that. There are also loaded questions. I don't know about you, but I have the worst time with these. "If you had to do it over again, would you have gotten the report out on time or would you have made the changes to the report that your manager requested?" Half of the time, as the interviewer, I don't even know which answer I'd prefer. They have to be worded very carefully because whatever answer they give, you have to be prepared to interpret it and to make sure that it's telling you something and that it means something to you.

Half-right reflexive. I have trouble with these too. "Sometimes I feel we shouldn't get reports out when management dictates because they set impossible due dates, don't you agree?" It's a statement that's half right and half wrong. What you're looking for here is a yes man. If somebody's going to agree with anything you say, that's an indicator of how they're going to behave in the professional setting too.

Leading questions can be useful; oftentimes they're not useful. "We often have to work under a great deal of pressure. Can you work under pressure?" Again, what are they going to say? But there have been situations where leading questions could be valuable. "We don't feel it's important to pass actuarial exams in this department. How do you feel about that?"

Question layering. Start with a closed-ended question, move on to an open-ended question, and continue to get more and more information as you move through the process. "Can you work under pressure? Great, give me some examples. Give me an example when you've done it and it hasn't worked out quite so well." You're layering through the process.

What about the conversation itself? Start with the 80/20 rule. You talk 20% of the time and listen 80% of the time. Don't agree or disagree. By showing your opinion, they'll be more apt to say things that will reflect your values rather than their own. Minimize the "whys." This gets at the parent-child relationship issue. If you continue to say why, it can put them on the defensive and they may not be able to come down from that.

Don't ask too many questions at one time. If you ask them four things at the same time, they'll remember the fourth one and, and they might remember the first one, but they will surely not remember the second and third. You're saving yourself the time of repeating your questions by asking one at a time. And remember you are in control of the conversation. Keep a sequence going. If they continue to get off track and go off on tangents, pull them back in and stay in control.

Administrative preparation. Remember what first attracted you to the company. Think back. You will have to sell the candidates on you, the position, and the company when they come in for their interview, and you better be prepared to do so. Notify the front desk that a candidate is coming in for a face-to-face interview. Meet the candidate in the lobby yourself if that's at all possible. Have other employees treat them as welcomed guests. If you're going to walk them through the department, have one or two people shake their hand and say, "Hi". Make sure your appearance and that of your office tells the right story. Many offices have switched to business casual clothing and that's fine, but we can all look neat. We can all look professional. Make sure you're telling the story you want to be telling.

Finally, have all the relevant information about the open position, including the job description, the conditions of employment, salary spread, benefits, and career advancement. They will ask this information, and you will look a lot better if you know the answers. I know we're all very busy, but there's nothing better to show these candidates that they are important than taking the time to do these small things.

You end up with 40 resumés. After weeding them out, you're down to 10. In most cases, 10 is still too many to personally interview. How about a phone interview? You don't even have to be the one to do it. It's something that an administrative assistant or a human resources (HR) representative can do as long as you have talked to them and made sure your requirements are clear.

One of the things you can try to pull out of a phone interview is the basic abilities as well as things like salary requirements. If you're looking to fill the position at an annual salary of $50,000 but the candidate's requirement is $80,000, then you've saved yourself and the candidate a great deal of time by discovering that over the phone.

Don't look for willingness, manageability, or personal chemistry. These types of characteristics will not come through over the phone.

What if you've held the phone interview and you've determined he or she is not the right candidate? Be careful how you let people down, especially over the phone. You want to be as open and honest as possible, but keep in mind that there is a day when they may actually fit somewhere in your corporation or even in your department. What if you are still unsure? Check out their energy level. Ask them to write a letter identifying their strengths and why they feel you should bring them in for a face-to-face interview. And, finally, if their ability seems to be in line with the requirements for the position, bring them in for the face-to-face meeting.

There are four types of interviewers. The unconscious incompetent. These are the people, and there are too many out there, who not only have no clue how to interview, but they don't even know that they have no clue. They think that it was a great interview and six months later, the person's long gone. It was a terrible hire and had they done things differently in the interview, the situation probably would have been avoided.

Then there's the conscious incompetent. This is where they are aware, but they do not know how to interview. I think that's great because it means they're willing to sit down and try to learn. They're willing to go through the steps they need to get to the point where they know what they're doing.

Third is the conscious competent. These are the people who know what they should do, who plan far in advance, spend the time they need to, have the questions all written out, etc. They know how to interview; they're prepared. And, finally, we've got the unconscious competent. These are the elite few who are so good at it, they don't even need to think about it. I don't think too many will fall into that category, but if you do, congratulations. I know I'm not there.

The Face-to-Face Interview

Remember your goal to get the answers to the three most important questions: Are they able, are they willing, and are they manageable? When trying to determine ability, you want to start out with easy questions. It helps to make the candidate relax. When they candidate is relaxed, they'll be more apt to give honest answers. Once they've established a pattern of honesty, it will be very hard for them to break that pattern. If they do break the pattern, more than likely you'll know it. Their behavior will change; they'll be fidgety.

Start out asking about the past. Does the candidate's history indicate that he or she will be able to do the job? It is much less threatening for a candidate to discuss the past than the future and it sets a good tone for the interview. Some of the basics that you can cover include starting and ending salaries and titles. Not only will it tell you what the other companies thought of the person, but it will also tell you what they expect from you. If they were getting promotions and raises every six months, they're going to have a hard time if your policy is once a year for raises and once every three years for promotions.

Draw out their basic responsibilities as well as any training courses and seminars they have attended. These can also indicate how the other company felt about them and what they were willing to invest in addition to what you may not need to invest since they've already received the exposure.

Ask them to describe some of their successes and failures. These can be very important to draw out—failures especially. Not necessarily what the failure was, but what they learned from it. Workload and time management. A few years back, two of the people reporting to me, we'll call them Bob and Billie, were compared often. Bob worked 12-hour days relentlessly. Billie worked eight and my boss kept coming to me, annoyed with Billie because he felt she couldn't possibly be pulling her weight working only eight hours a day. I kept telling him she got her work done, so I didn't see the problem.

Bob was the golden employee and when he left the company, my boss panicked. I asked Billie to take on as much as she could until I could get him replaced. Billie continued to work eight hours a day and did Bob's entire job in addition to her own. I never did replace him. I was shocked at my own lack of knowledge of how Bob spent his long days. That was a valuable lesson for me!

Communication: Who, what, when, where, and why. Who do you communicate with? On what level? Is it written? Is it a formal presentation?

Willingness. Can but won't is a lose/lose situation. You want to look for people who not only want to, but will get the job done—someone who will work smoothly with the rest of the team and will encourage challenges.

Ask questions concerning self-evaluation. You're trying to capture what they think of themselves. It'll give you a good indicator of whether or not they'll truly be willing to do this job. Ask about their strengths and weaknesses. I know the big trick is to take the weaknesses and turn them into strengths. Piece through that, ask questions, and try to get them to qualify what they're getting at. Accomplishments—not so much what the accomplishments were, but how they feel about them. Would they do anything differently? You can learn a great deal there.

Compatibility: individual versus team; lead versus follow. More than likely in every position they're going to have to do all of the above. They will have to work as an individual and as a team and be in a position of being the leader and the follower in projects and processes. How do they work with difficult people? What's their definition of a difficult person?

Work atmosphere. What's an ideal working atmosphere for them? Decision-making ability. What types are most difficult and, again, what were some successes and failures? On decision making, weigh the steps they took to get there, not just the results. What kind of thought process did they use? Organizational abilities, time management, energy, planning their projects, and their days. What types of projects did they find exciting and how did they set goals?

Get examples of times when they set a goal and it didn't quite work out as they planned. Their ability to achieve success is based on their ability to learn from failures. Stress management: How do they handle difficult situations? What was the outcome? What would they do differently?

Areas needing development. If you establish a pattern of honesty early on in the interview, you'll get some very good information. As we all know, nobody's perfect. There's nothing wrong with sitting in an interview and telling somebody, "This is what I need to develop; these are my weaknesses." You should look at that honesty as a valuable attribute. Motivation, personal growth effort, and definition of success. How do they define success? That will tell you a great deal about where they're looking to go in the future.

Manageability. Your responsibility as the manager is to get things done through others. You can't do that if your staff is unwilling or unmanageable. You're not going to be able to get them to do much of anything. You want to look for patterns and, most importantly, look for candidates who are manageable by you. You need to evaluate your own management style before you can figure out who's going to work well reporting to you. If you are a hands-on manager and you are not flexible on that subject, you better hire people who want a hands-on manager as opposed to somebody who might want to be flexible or somebody who prefers a hands-off manager. I've seen all types. You need to evaluate yourself.

How do they take direction? How do they take criticism? How do they take praise? You may think praise may be an odd one in there, but I had somebody who worked for me at one time that on the surface seemed to be a very good worker. I make it a habit to give praise to somebody who does a good job. This person was extremely uncomfortable and would squirm and leave the room. The person finally told me that my praise was embarrassing . In the long run, and for more reasons than just that one, the employee turned out to be somebody who was unmanageable for me at that time.

Disagreements. What kind of disagreements have they had with their current managers, past managers, co-workers, and how do they handle them? What are their dislikes? How about areas where their current boss could do a better job? This could be a forewarning of things to come. It could teach you a few things, too. Define their best and worst manager. This can be a scary question sometimes, because in one, or the other, they could be defining you.

How does your boss get the best of you? This is one of my favorite questions to ask in an interview. I had one person ask, "You mean, how do they get the best of me positively, or how do they get the best of me negatively?" I thought, you answer it however you would like to. It's pretty interesting what it can draw out of people.

How did you get the best out of your boss? Their answer can tell you whether or not this person is going to be willing to support you. You have people who will come in and work against you, possibly looking to jump over you. You will also have people who will be able to work with you and know that if you look good, everybody looks good. And, if you move up, there may be openings for them.

What if they had a traveling boss? How did they handle decisions that had to be made when the boss was gone? What kind of loyalty did they have, not just by staying with the company, but by doing things that were loyal to the company? They'll protect the department and their reputation. How about anger management? "Give some examples where you've lost your temper. What did you learn from it? Did it ever happen again?"

Rewards and recognition. How do they want to be rewarded? What's important to them? How do they want to be recognized? Were there situations where they felt they should have been rewarded or recognized and they weren't?

Position level. Determining the questions you're going to ask is obviously dependent on the position level. I think this is a great quote: "I see you have no computer training. Although that qualifies you for senior management, it indicates you are underqualified for our entry-level position."

Discrimination is something that we all often will take for granted, but something that you should try to remind yourself of. I had a situation just in the last six months, where I was in the middle of an interview and I had the resumé sitting in front of me. We were talking through things and I noticed one of the jobs that she held and the location was listed as G-h-a-n-a, W-A. Not thinking too clearly, I registered Washington. I thought Ghana, Washington? She said, "No, Ghana, West Africa." I got this chill down my spine. Had I just asked her where she was from, i.e., her country of origin? I marched right down to HR and said, "All right, here's what I did."

As far as physical handicaps, the American Disabilities Act forbids you to ask if the candidate is disabled. However, it is the candidate's responsibility to inform you, especially if there are certain physical things in your building that have to be done in order to accommodate this person.

From the Floor: Was asking about West Africa really an issue when it was on her resumé?

Ms. Tourville: Yes, that was HR's feeling, too. They didn't think that I had any abuse to deal with since it was on her resumé. It was just a subtle little thing that happened.

Now it's time for the evaluation. Just a couple of hints. Don't wear blinders. Say you went through the 10 things that are most important to you. The candidate fit in nine categories, but not the tenth. Make sure that you're comfortable with that tenth item; that you can live without it or you can manage it.

No news isn't always good news. If there's something you forgot to ask, follow up. Ask HR to follow up. Don't assume their answer will follow the pattern of their other answers. Don't assume anything.

Get past the impression of the first few minutes. That is what this session is all about. I've had situations where I've gone in and felt in the first couple of minutes that this is never going to work. I forced myself to sit through the whole interview, to go through my process, and I ended up hiring the person. I've also had times where, after only a few minutes, I thought this is great. I get along with this person so well, it's going to be a fantastic fit. However, by the end of the interview, I felt completely different and did not make an offer.

Make c comparison to more than just the most recent candidate. This is a tough one, too. You have two interviews a day for three days; it's very easy to compare the person to the one you just had. Make sure you try to keep your views independent of each person. Remember them. If you have to write them down, line them up, and do some comparisons. Get past the personal click, somebody walks in, they're a big golf fan, they follow the stock market, and they're a Packer fan, whatever—get past that. Concentrate on their abilities and their willingness.

What is the right hire? Someone who is willing and able, has a team spirit, and is manageable; a professional who fits the corporate image, one who is compatible with where the corporation is going—an emotionally mature adult with sound and rational judgement, one who complements the existing department. If, after the fact, you can go through and ask yourself every one of those questions and you believe the candidate is a good fit, odds are with you they will be a successful hire.

Aimee Kaye is the president and founder of Actuarial Careers, Inc., an executive recruitment firm exclusively specializing in the advancement and placement of chief actuaries, FSAs, ASAs, and pre-ASAs on a worldwide basis. Since 1985, Aimee has personally placed over 400 actuaries. Aimee received her master's degree from New York University in communications and has a bachelor's degree in education from the University of Rhode Island.

Ms. Aimee Kaye: When Lisa and I first discussed how we were going to approach the subject of how to hire the best candidate, she asked me how I, as an executive recruiter, decide on which candidate to present to our clients.

Having been in the business of recruiting actuaries for 15 years, and having dealt with thousands of actuaries over that time as clients, as candidates, and as people who I just speak with from time-to-time, I personally have a sense of the different personality types and extensive knowledge of their technical skills, and hopefully of my client's particular needs and requests. Because of my expertise of exclusively placing actuaries for quite a number of years, many of my clients or the hiring managers just give me a quick thumbnail sketch of who they need to hire or think they need to hire.

Many times, it is enough for me to go on, to find the right candidate. The candidate who fits that quick thumbnail sketch has a good telephone interview. But when the candidate is actually interviewed on site, and others in the department interview this candidate too, a different result sometimes occurs.

The hiring manager really liked the candidate, but the feedback from others in the department comes back that they need a little bit more of this or a little bit less of that. They need somebody who's more technical with interest-sensitive product experience or somebody with experience in the high-end market or they need somebody a little bit more presentable because they'll be interfacing with senior management. It's going to be less of a hands-on job and more of a managerial spot. All of a sudden, things start to change. They give me an updated thumbnail sketch of what they're looking for. Sometimes I do get a job description.

How many of you have put together job descriptions? I'm impressed with the show of hands. Believe it or not, we have 600 actuarial positions we're recruiting for and only 25% of them have formal job descriptions. I don't know where you're keeping all your job descriptions or maybe you're preparing them before the interview.

While a lot depends on how autonomous the hiring manager is, having a job description is helpful not only to the candidate, making sure he or she is interested in the position, but also to the recruiter in finding the right candidate who is willing and appropriate for you to interview. Having a formal written job description can help you, the hiring manager, the most. Let me tell you why.

Sitting down and preparing the job requirements and responsibilities in advance, deciding what the parameters of the job are before you pick up the phone and call a recruiter will save you time in the long run. It will save you time when you speak to a recruiter or to your HR person about the type of person you're looking for. It'll save you time when you're giving instructions to the others in the interviewing process so they can assess the candidate when he or she comes in to interview. It will also save you time when you actually do interview the candidate, as you will have more confidence in your own decision that this is the right candidate.

For those who have developed job descriptions in the past because it is required by HR or some higher authority, I will show you how to also use them as a platform and a basis for developing the right interview questions so that you can interview and assess a candidate's capabilities and willingness to take the position, do a good job, and be someone who you can manage as well as fit into your corporate culture.

Let's start and find out how we develop a job description. There are several components to a formal job description, including:

- The job title
- The main purpose
- Job functions and associated work habits
- Required experience
- Education
- Reporting relationships and other information

I will be going over these main areas, which, on the surface, you'll be able to describe, and then I'm going to circle back to show you how you can incorporate them into your interview process.

The first one is a job title. The job title should identify the content and scope of the position, if possible. When we do not have a working job title that identifies the scope of the position, we create one. For example, we have one client who uses the following titles on their formal job descriptions: actuarial assistant, actuarial analyst, assistant actuary, and actuary. It is difficult to use their titles when they just denote the level of the position; and I may have five jobs from them. Although having a title like this may help relate it to others in your organization, it is preferable to be a little more descriptive, such as assistant actuary life pricing, or associate actuary disability. We try and couple it with the content area. Even though it's not the way you title somebody in your organization, it is helpful on a written job description to include the content area. This way when you are handing out a job description to those interviewing the candidate, at least they will know what type of position a person is interviewing for in one glance. Also, make sure your titles in the job description are common to your organization.

Main Purpose

It is so important to use clear direct language with action verbs when summarizing the job's main purpose. Ambiguous purposes confuse the recruiter and the candidate, as well as others involved in the interviewing process.

Here is an example of a job mission or purpose: "The mission is to develop price and implement innovative annuity products in order to increase net income and to communicate effectively with business leaders and associates on the implementation and profitability of annuity products." Notice how clear the language is, the use of action verbs and a description less than 50 words. It's actually 34 words.

Now let's go on to job functions. The list of job functions should define the job's mission or purpose in more specific detail. Remember to use action verbs and to be clear in the language you use. List in a logical sequence based on order of importance. Even more important, list in order of the amount of time required for that particular function, with those functions needing the least amount of time listed at the bottom. Be aware that no candidate likes to see a huge list of job functions; it can be too overwhelming. When we have a job description that does include a so-called laundry list, we often hear, "They want one person to do all of that?" If there are other functions or responsibilities you would like to list and you want to avoid that "laundry-list look," add another line called special projects or other projects as needed to include those functions.

Here's an example of a job function: "Prices and reprices all life products. Pricing includes analysis on a statutory, GAAP, cash-flow, and value-added basis. This includes providing actuarial reports needed for board approval." Notice how specific and clear it is.

A job function like this and all job functions can be broken down into two basic fundamental components: technical skills and work habits.

The technical skills are germane to the content of the job. They describe what knowledge, abilities, or skills are required to perform the essential job functions. Technical skills are easy to identify. We can look at this job function and know whether you're on the health side, life side, or financials; what are the technical requirements needed to do this job?

You, as a hiring manager, have to decide whether you want these skills. Are they desirable? Are they necessary for this candidate to have or can they be learned on the job? Can you train them? Where are you willing to give? We are going to go over technical skills later in more depth when we use them for developing interview questions.

We just identified the technical skills needed to perform a job, now we're also going to identify the work habits needed. Work habits, in contrast to technical skills, describe how the person is expected to perform. These skills may apply to many different jobs and help determine how well the person will function in your particular work environment. A person's work habits are based on their past behavior or how they performed in other positions in the past and how they lived their life, their attitudes, and their beliefs. Most interviews focus on assessing a job candidate's technical skills and abilities and fail to take into consideration the importance of work habits is an influential factor in forecasting a candidate's success on the job.

You, as a hiring manager, have to try and assess past behavior because past behavior in an indicator of future behavior.

Let's talk about some of the work habits. Work habits are adaptability, attention to detail, communication skills, cooperation, energy, flexibility, initiative, interpersonal relations, leadership, motivation, organizational skills, professionalism, strategic thinking, and team building.
Think about the chair you sit in when you eat breakfast, lunch, or dinner at home. Do you sit in that same chair all the time? Do other members of your family always sit in that same chair? That's behavior. It's very hard to change behavior. Work habits and the way we perform our jobs are also patterns of behavior. In deciding whether a candidate that you're interviewing can perform this job or not, you must assess his or her work habits in addition to his or her technical ability.

Think about why some people succeed while others do not in a particular position. Once on the job, what makes one employee more successful than another you recently hired? Most people who do not succeed in an organization, whether they get fired or quit, do not fail because they lack the technical skills. They fail because in one way or another, they do not have the appropriate work habits. Perhaps they are too bureaucratic, maybe even too flexible, or not flexible enough. They might not have the same sense of urgency to get the job done the way you would like it. They might not be as cooperative. They may not be a team player. They may not be able to handle stress, be able to handle an emergency appropriately, or handle it the way you would like them to. They may lack commitment, be unable to set priorities, or cope with stress.

How do we interview to make sure we hire the technically competent candidate who also has the essential work habits to succeed in your corporate culture?

First, you need to identify and list the key work habits that are essential to performing the job functions successfully. Once you have identified them for each job function, limit the number and select 6-8 work habits that will help you separate the superior performers from the average ones. These differentiating competencies hold the key to building a high performance team.

To help you in deciding which work habits are primary, ask yourself the following questions:

- Who are the superior performers in my organization?
- What about their work sets them apart from the average performer?
- What work habits are needed to do this job in an outstanding manner?

If you are like most interviewers, you may be reluctant to narrow your work habits selections to only 6-8. Remember that your goal is to select superior candidates. You will only have a limited amount of time to conduct each interview. It will take you at least 30 minutes to gather enough data from a candidate to evaluate his or her work habits. If you add the amount of time required to build rapport with the candidate, explore his or her technical skills, sell your organization, answer questions, and handle other administrative issues, it is virtually impossible to conduct such an interview in an hour or less. You will lose very little by concentrating on your key work habits. And, you will get 99% of the data you need to accurately assess a job candidate's competency if you limit your questions to those related to a few critical areas.

Let's finish what goes into the job description so we can use it to begin preparing our interview questions. Following the job responsibilities are experience required, education, training, reporting relationships, and any kind of special requirements or information that is needed.

We are now going to look at some examples of job descriptions before we begin the preparation of interview questions. The job descriptions are at the end of this text.

Let's look at Job Description #1. Job Description #1 is very simplistic. There's a title and the responsibilities listed, but actually the responsibilities are requirements, expert APL programming, significant prior experience, PTS. If you glance through that quickly, they are not telling you what this person will be doing; they just tell you what they want this person to have. This is a very simplistic job description.

Now let's look at Job Description #2. This one is very complete. It includes a title that tells you about the level and what this person does. You have an overall function, then you go to significant job duties which have about five job responsibilities. The last one has a number of things underneath it. But it is not a laundry list. Then there are job skills, qualifications, experience, education, and a little more detail. It's a good job description.

Let's turn to Job Description #3. Job title: actuary annuity products. It also has to whom the position reports: vice president, actuary. It includes a job mission or purpose. Looks like it is very succinct. This job description also includes an organizational chart, which is very helpful. It shows where this position fits within the organization. People always like to know where they fit within the organization, who is above them, and what positions report to this position. It lists supervisory responsibilities, some deliverables, and job responsibilities. It is succinct, using action verbs, and a list of experiences and skills required for the position. An excellent job description.

Let's take a look at the last one, Job Description #4. You may have noticed these jobs get more and more detailed. This last job description, believe it or not, is the most junior of the four positions, but it's the most detailed of descriptions. The HR department really did a good job on this. Again, you have the title; data analyst, and the purpose of the position and responsibilities, which include the percentage of time for each job function. Not only do they do that, but they also have a guide on meeting guidelines. Failure to perform this function may have serious consequences for the company. They list certain deliverables, so you know the importance of each job function.

It includes position requirements, which are desirable and required, education, and job evaluation factors. These are similar to our work habits: problem solving, analysis, creativity, and creative thinking. They talk about how important they are for this particular position. It describes supervisory responsibilities and managerial authority. This job description really spells it all out and shows the impact of the decisions this person will be making on the job. It ends with experience and proficiency levels.

Now that we have a job description, we can create a behavior-based interview. By spending the extra time to develop interview questions ahead of time, you will get better results and will feel more confident in your final hiring decision. And, once your preparation is done, you do not have to change it significantly unless the job requirements change. Then, it may only be more of a modification.

To assess a candidate's job-related knowledge, skills, and abilities, you will need to develop a series of open-ended questions for each work habit and each of the technical skills you have identified in your job description.

The way you do this is to take an essential job function from the job description. Remember earlier I discussed job function competencies where we identified technical skills required and the ideal work habits for each job function? You need to write a few questions to address each technical skill and work habit required. I recommend using two questions per work habit and technical skill per interviewer. The number of questions you would need to prepare depends on how many people will be on the interview schedule and how organized a process you want to create. Why two questions for each work habit and technical skill? Well, you would be surprised at some of the different answers you get the second time you ask a question differently. This helps you get a more complete picture of the candidate you are interviewing.

Also, you may want to develop interview questions for the other members of your interview team. Develop interview questions for the work habits and for the technical skills and give them out to the different people on your interview team so that you all are asking the candidate different questions. This way when you meet together to decide whether this candidate is right for your organization you all have different things to talk about and you'll be able to piece together this person's history and personality. Use open-ended questions. The number of questions, again, should correspond to the number of interviewers.

Since work habit questions play a vital role in determining who might succeed and who might fail in a given job, I will focus my attention on these types of questions first. The best way to write these questions is from the definition themselves.

Let's look at this job function: Manager's actuarial administrative support unit. Here are some of the work habits that I think would be desirable in someone performing this function: interpersonal relations, communication, delegation, team building, organization, leadership, and motivation.

You will want to use the definition of each work habit. Let's start with interpersonal relations. One definition of interpersonal relations is: "Maintains effective relationships with others, uses tact, is sensitive to feelings and needs of others." After looking at this definition, separate it into different components; then ask an open-ended question for each component.

Maintains effective relationships with others. Now let us write an open-ended question that requires the candidate to recall a specific event related to this element: "What have you done to develop strong, rewarding relationships with others?" It's a heavy-duty, meaty question. Ask the question and be quiet. Let the candidate think. Don't worry about the silence; the candidate will come up with an answer.

The second one uses tact: "Give me an example of a time when you had to be tactful when speaking to another person."

Third, "Tell me about a situation when being sensitive to the needs of another paid off for you."

These are open-ended questions that will give your candidate a chance to tell you about a situation and experience that he or she had. A good way to think about open-ended questions is they start with:

- Recall a situation where . . .
- Tell me about a time . . .
- What have you done when . . .
- Give me an example from your background . . .

These situations will allow the candidate to really go into detail and talk about situations and past experiences that they have had either at work, at home, or in their personal life. Once you get a candidate talking and feeling comfortable about what he or she is saying, you'll hear all sorts of different things—things that you never expected to hear. And from there, you can probe further.

What do you do if you find yourself not as prepared as you thought, and you begin asking closed ended questions such as, "Are you tactful when you give direction to your subordinates."

Now you know that the candidate is going to say, "Yes." Turn it around, and ask him or her to give you an example or recall a situation. The only way you're going to be able to predict future behavior is by finding out what the candidate did in the past.

Let's look at another example. Organizing. Here's a definition: The ability to establish priorities and a course of action for handling multiple tasks." An open-ended question for that work habit: "Give me an example where you have established priorities in order to improve efficiency and work flow."

Get the person talking about the systems he or she uses in managing his or her own department. It is better than saying, are you organized? Is your desk clean? Or is your desk messy? This will give you a lot of information and will also open up a dialogue. You will not just be asking question after question, but you'll be able to ask them questions from the responses that you get.

Let's look at one more: Delegation. Definition: "Assigns decision-making and other responsibilities to subordinates. Uses subordinates effectively."

Good definition, but other definitions could suffice. Open-ended question: "Tell me about a time when you took a chance by giving a subordinate greater responsibility than you normally would have. To what extent was that a positive or negative experience for this person?" Good question, you'll get a lot of good answers and you'll find out if they really know how to delegate.

We can go on and on with these work habits, but I want to talk about some technical skill questions so we can complete the interview process. No interview process would be complete without asking some technical skills questions.

Ask the "what-if" and "how-to" questions, knowledge-dependent questions, and create questions that measure different skill levels. Give them a scenario and ask questions regarding that situation.

A how-to question is very simplistic: "How do you price this product or how do you do that." A knowledge-dependent question will show you if they can apply what knowledge they have learned. Create questions that measure different types of skill levels so that you can assess where their knowledge base is.

But remember, as you all know, if they are a good actuary, they can learn anything. Isn't that correct?

To conclude, to develop and round out your powerful job-related interview, you really need to create a very good job description to use as a platform for your interview questions. Identify the essential job functions, specify the technical skills, and, more importantly, link the functions to the work habits. Work habits are very important in predicting behavior. I can't stress this enough. Develop and prepare appropriate interview questions. Give them out to the other interviewers. Preparation is key.

I want to end with one last point, especially to actuaries. In your profession, and I'm not an actuary, but I've learned a little bit about actuarial work over the years, you do a lot of research on past experience, experience analysis, and experience studies in order to price life, health, and other types of insurance to predict and avoid risk. Is that correct? Well, why not use that same logic by analyzing candidates' past experiences to help reduce your risk in your next hire?

JOB DESCRIPTION #1

Assistant Actuary–Life
Job Responsibilities:

Expert in APL programming; significant prior experience with PTS (2+ years experience modifying PTS workspaces); ASA level understanding of actuarial concepts and insurance accounting; ability to tackle new problems from first principles; enthusiasm for learning new concepts; creativity; ability to take initiative; organized and careful to write clear documentation; database fluency; team player.

JOB DESCRIPTION #2

Title: Manager, Life Pricing	Job Code:
Department: Life Product Development	Band: D
Division: Pricing and Actuarial Admin. Support	Date Prepared:

OVERALL FUNCTION:

The life pricing actuary is responsible for actuarial pricing of all new life products and repricing of in-force products, including profit analysis, filing, board approval, and implementation. In addition, the life pricing actuary manages the actuarial administration support unit.

SIGNIFICANT JOB DUTIES:

- Prices and reprices all life products including term, universal life, index universal life, variable universal life, and whole life pricing, as well as analysis on a statutory, GAAP, cash-flow, and value-added basis. This includes providing actuarial reports needed for board approval.

- Responsible for all actuarial aspects of product filings and product implementation, including illustration and administration testing.

- Responsible for chairing a product implementation task force, which includes members from actuarial, government relations, model office, ILCS, systems, communications, and new business.

- Interfaces with top field associates and home office distribution area to effectively identify product opportunities. Requires ability to effectively communicate complex actuarial ideas into layman's terminology.

Page 2, Job Description #2

- Manages actuarial administrative support unit. This unit's responsibilities includes:
    1. Answering and researching complex policyholder questions on all life products such as questions on MEC, guideline premiums, cost basis, policyholder values, etc.
    2. Interacts with field, policyholders, and client service representatives.
    3. Responsible for monthly processing such as establishing interest rates and participation rates.
    4. Handles several manual administration processes.
    5. Supports model office testing for values.

Employee has the express duty to comply with all applicable insurance laws and regulations and with approved company policies, practices, and procedures related to ethical market conduct activities. Employee further has the responsibility to immediately report known or suspected violations of laws, regulations, company policies, practices, and procedures to the company's compliance officer.

JOB SKILLS/QUALIFICATIONS:

- Strong interpersonal skills due to interfacing with a lot of different areas.
- Strong communication skills and ability to interact with non-technical groups.
- Ability to effectively delegate and generate a team environment.
- Strong organization skills

EDUCATION: ASA or FSA

EXPERIENCE: Ten years of actuarial experience with at least three years in pricing.

JOB DESCRIPTION #3

Job Title Actuary (Annuity Product)	Reports To (Title) - VP and Actuary
Organization/Department	Geographic Location

Basic Function	A. Job Mission (or Purpose) The mission is to develop, price, and implement innovative Annuity products in order to increase net income. Communicate effectively with business leaders/associates on the implementation and profitability of Annuity products.

B. Job Scope

Reporting Relationships

3rd Level Manager –

2nd Level Manager – Chief Actuary

Immediate Manager – Actuarial Vice President and Actuary — Annuity Product Manager

Job Being Described
Asst. VP and Actuary

Subordinate Structure–
Direct Reports:

Senior Policy Analyst

Internal Customers:

I1. Annuity Product Manager

I2. Marketing Representatives

I3. Product Manager

I4.

I5.

External Customers:

E1. Agents and Brokers

E2.

E3.

E4.

E5.

Total Headcount:
_____1______

Job Description #3, Page 2

<table>
<tr>
<td colspan="2">Supervisory Responsibilities (YES or NO) Yes
1. Initiate or recommend hiring or discharging action. Yes

2. Initiate or recommend salary action. Yes

3. Accountable for the work performance of the team. Yes

4. Responsible for training. Yes

5. Conduct performance appraisals and coach for development. Yes

6. If no to above, does the incumbent create work assignments and/or check the work of others in the work unit but without the responsibilities in the previous five statements? Yes___ No__

Comments:</td>
<td>Deliverables to Customers & Purpose
I1. Innovative, competitive, profitable Annuity products
Assure integrity of pricing and profitability
I2. Innovative, competitive Annuity products
I3. Profitability assurance

I4.

I5.

E1. Advice on customer issues (i.e. present values)
Explain products
E2.

E3.

E4.

E5.</td>
</tr>
<tr>
<td>Scope</td>
<td colspan="2">C. Express the impact of this job relative to Company resources or revenue.

Revenue $_______ Operating $___________
Job's Payroll $__________ Assets (including) $_billion
Project Budget Responsibility Inventory</td>
</tr>
</table>

Job Description #3, Page 3

Principal Account-abilities	D. End results or objectives which the job exists to achieve. Include % of time performing each objective. • Lead projects to design and implement innovative, profitable product designs for the Annuity markets (50%) • Assist in identifying and evaluating emerging Annuity markets (10%) • Manage Product and Process Planning (10%) • Coordinate development of Annuity products and markets with other product lines (10%) • Participate in review of market positioning and setting prices (5%) • Review and support integrity of pricing and profitability algorithms and programs (5%) • Provide expertise in evaluating blocks of business (for sale or purchase) (5%) • Provide support to distributors and/or policyholders in special situations (e.g. commutations) (5%) • Review and analyze expense levels and assumptions • Direct development of policy forms for new products • Review marketing material
Knowledge & Skills	E. Describe the minimum knowledge and skills necessary to accomplish the principal accountabilities of this job under normal circumstances. • College degree in math or related field or equivalent directly related work experience • 7–10 years actuarial experience–preferably at least half in product development • Actuarial product development experience with emphasis on annuities • FSA • Strong computer skills–APL preferred • Demonstrated experience using quality tools to include completion of training within six months • Proven ability to execute in a dynamic environment • Excellent team facilitation and knowledge of team problem solving techniques • Demonstrated success initiating change with positive results • Excellent interpersonal, communication, and presentation skills • Ability and willingness to travel if necessary

JOB DESCRIPTION #4

Title: Data Analyst
Incumbent:
Director:
Supervisor/Manager:

Division: Strategic Planning
Department: Information Products & Services
Date: 3/1/99

I. Purpose of Position:
To provide programming and application development using statistical and data management technical skills to expedite the development initiatives undertaken by the Information Development group.

II. Position Responsibilities: (List in order of importance. Be specific. Include any physical demands required to perform an essential function.)

	% of Time	Meet Guidelines*
Provides SAS and warehouse reporting tool development skills to meet the needs of the Information Development group.	50%	1,2,3,4,5
Designs, develops, and recommends various programming techniques and tools for data manipulation and reporting.	20%	1,2,3,4,5
Provides statistical input regarding the creation of analytic plans.	20%	1,2,3,4,5
Supports other departments as defined by Information Development.	10%	3,4

*For responsibilities which are essential job functions, please note the codes listed below which are applicable.

Guidelines for Determining Essential Functions:
Code
1. Failure to perform this function may have serious consequences. (List onsequences.)
2. Elimination of this function would fundamentally alter the position.
3. There are limited employees among whom the performance of the function could be distributed.
4. This function is highly specialized; employees are hired for their skill/ability to perform this function.
5. This job responsibility occupies a great deal of the employee's time.

Job Description #4, Page 2

III. Position Requirements: Specialized Knowledge, Skills and Abilities: Please list and check whether Required (R) or Desirable (D). Include equipment required to operate.

R	D	
	X	Excellent oral and written communication skills
X		Knowledge of code documentation and flowcharting for moving code to a production system
X		Basic knowledge of internet including HTTP, FTP and telnet protocols, and HTML syntax
	X	Web development skills including Java programming and/or another CGI scripting language
X		Ability to work on multiple computer platforms including UNIX and MVS
X		Experience with data warehouses and a warehouse reporting tool such as Microstrategy or Brio
X		Knowledge of mainframe environment: MVS, SAS, SQL, GQL, JCL, CICS, DB2
	X	Knowledge of Microsoft Project, Word, Excel, Access, and PowerPoint
	X	Experience in the analyses of medical or pharmaceutical data
X		Ability to work under deadlines and pressure
X		Excellent problem-solving and debugging skills
	X	A strong background in health care benefits, and provider and managed care plans as they pertain to analyses of data
X		An ability to work independently in a continuously changing environment

Education. Please check highest level of formal education required (R) or Desirable (D).

R		College BS/BA Degree. Fields: computer science, mathematics, statistics, economics, sociology, psychology
	D	Advanced Degree. Field: computer sciences, mathematics, statistics, economics, sociology, psychology
		License of Certification. Field: N/A

Job Description #4, Page 3

IV. Job Evaluation Factors:

A. Problem Solving/Analysis and Creativity: Please check and describe the problem solving and creative thinking required in the job. Be specific and use examples of job responsibilities.

Fact Finding (Please list and check whether routine, difficult or complex.)

- Routine (R)
- Difficult (D): Facts must be assembled and are not readily available, best solution of clear facts must be assembled and are nor readily available, best solution of clear alternatives is selected.
- Complex (C): Facts or evidence must be gathered, proper analytical method must be selected to reach conclusion

R	D	C	% of Time	
X		X	25%	Code programs capable of meeting information development objectives
X			5%	Identification, selection, and utilization of programming techniques/tools for optimal results
X			15%	Interfacing with members of the development clusters
X			5%	Ability to interact and communicate with a variety of computer products

Creative Thinking (Please list and check whether helpful, required, or essential.)

- Helpful, but not required (H)
- Required (R): Develops new approaches or finds solutions to fairly well-defined problems
- Essential (E): Creates solutions to novel problems or applications

H	R	E	% of time	
X			5%	Solve problems through a quality improvement process
		X	20%	Design code to test specified hypotheses
	X		10%	Anticipate problems and design creative solutions in advance related to data manipulation and code design
	X		15%	Utilize creative approaches for summarizing findings for new business products and services.

IV. Job Evaluation Factors:

B. Supervision

Direct (total subordinate-staff)			Functional (dotted line) or outside reports			
Title	No. EEs	Grade E-NE	Title	Company	No. EEs	Grade E-NE

C. Internal and External Contacts:

Name of Contact	Organization	Type Code	Type of Contact
Information Development Team Members	_____ Health Systems	B,C, & D	A= Negotiation and contract settlement where strong opposition or antagonism is present
			B = Persuading/convincing others to grant approval and take action
			C = Explaining difficult information, establishing rapport and gaining understanding
			D = Giving and/or receiving factual information

D. Managerial Authority Level/Scope of Position/Impact of Decisions:
Please describe and give an illustration, if necessary.

Functional or Project Responsibility: Please describe ongoing responsibility for program, projects or functional areas. Include what or whom determines which projects are worked on, determines schedule, how to do the work, and how often projects change.

To develop programs/code that meets die research needs of the information development clusters.

Decisions made by incumbent:
What code and/or language to use in fulfilling programming needs of information development cluster members.
What output should be developed to best display the information.

Impact of Decision: (Include monetary responsibility)
The validity of the analysis is dependent upon coding for the appropriate tests and providing the appropriate output.
Cycle time of generating the necessary coding is critical to maintaining the schedule of projects.

E. Work Environment/Physical Demands/Travel

Describe work environment (check if office), any light physical demands, or travel (include frequency, method, or destination) that are essential to this position.

X Office Environment
If adverse work environment or heavy physical demands, complete the work environment/physical demands addendum. ??(See file named Addendm.wkl)??

Experience: In addition to education (or equivalent experience) listed above, please describe briefly any further work experience required to perform the position's responsibilities (include approximate number of years experience and in what field). The ideal candidate will have 1–3 years of programming experience using SAS, GQL, SQL, and JCL in a mainframe and/or UNIX environment as well as experience developing applications with a warehouse reporting tool such as Microstrategy or Brio.

Proficiency Level: The level of proficiency or development within the profession or specialized field (technical or managerial) required to perform the position responsibilities.

	Entry (acquiring practical experience, performing less difficult assignments)
X	Journey (fully qualified; works independently on assignments of standard difficulty)
	Advanced (performs complex assignments, gives technical guidance to Journey level)
	Expert (applies expert knowledge as internal consultant, researcher)

________________ ______ _________________ _____
Incumbent Date Human Resources Date

__________________ _______ ____________________ ______
Supervisor/Manager Date Employment/Recruiting Date