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## How to Conduct a Courtesy Interview

*By Dan Simmons*

**Continuing in the hypothetical situation about “Paul,” here are some tips on how to handle a courtesy interview.**

### What to Say On the Call

“Hi! My name is XX, and I’m the Director of XX at Great Employer. I was speaking with XX today and he recommended that I give you a call. He said that you might want to explore advancing your career, and I’d like to know what you have in mind.” (Pause and see if Paul picks up on this; if not, ask if XX was correct; and if yes . . .) “Would you be available for lunch one day next week?”

### What to Say in the Interview

First, set expectations accordingly. Start with the truth. “I wanted to meet with you, as I’ve heard good things about you. I’m not actively recruiting for a particular job at this time, but things can change at any moment. I thought it best to learn what you were hoping to do in your next position so that I can review our situation and see if I can make a fit. Tell me what you’re hoping your future will hold.” SHUT UP and LISTEN VERY CAREFULLY to what he has to say. And then follow up with this: “While I try to stay on top of the industry, I certainly don’t have your vantage point on your current employer. Why do you think you need to look outside of your current employer to achieve your goals?”

The **answer to this question** will explain what’s wrong in his situation. If you can provide the future Paul is looking for and your company does not have the same issues that his does, you can recruit Paul. However, if he has unrealistic expectations, I hope your meal is tasty, because it may be the best thing to happen during this hour.

### Possible outcomes

Let’s look at the three things that might be occurring at this point:

- Paul could be very happy working on your team because you could help him reach his goals in an environment where he would feel comfortable.
- Paul has unrealistic expectations.
- Paul has realistic expectations, but your company cannot meet them.

With the latter two outcomes, you should become a detective and casually find out what you can about your competitor—changes they are making, how they perceive your company, their strengths, etc. Wrap up with a commitment to share notes from this conversation with your human resources department and your boss, and state that you will be in touch if/when a possible match arises. You have just spent this hour doing **in-depth market research**. Now go back to your office and make certain that your team is doing all it can to be the best in the marketplace.

If you treat Paul with respect and listen to his concerns, he will walk away with a respect for you and your organization. Can you see any downside to having your competitor respect you? Good PR is hard to get. Paul may one day recommend someone else to you, someone who might be the right person for your team. Networking in your industry has too many advantages to list in this article, but networking at this level of intimacy can prove very useful.

If it turns out that Paul could reach his career objectives with your organization and he has realistic expectations, **next** you need to find out his timeframe. “When are you hoping to make this change?” Do not fear this question. Many times the candidate will be months in front of the time they want to make the change. If it’s soon, then you have some thinking to do, and you should commit to reviewing your budget and team and contacting the candidate if an opportunity arises. If it’s later, then you have some planning to do.

There is one other alternative. If you determine that Paul would be best suited working for Company Z, you should recommend that he contact them. You can never have too much good karma.

### **Planning for Change**

First, look at your prospects for expansion. If there are none, rank your current staff. Don’t worry about the top; look at the very bottom. Ask yourself this question: If I had Paul instead of my bottom performer, how would my life be better? If your life would be significantly improved, then you need to schedule a real interview in your offices within the next two weeks.

Look for ways to better utilize your worst performer in other areas of your department or the company. If there are none, meet with HR and/or your boss to discuss your options and look for ways to improve your team. Great companies are always looking to improve, and your boss and HR should provide avenues for you to better your team by adding top performers from the outside and by relieving you of having to deal with under-achievers.

If you have a question about this topic, please contact me at [dan@consearch.com](mailto:dan@consearch.com)