

BLS Focus Interview Template

Candidate Name: []

Evaluation Scorecard

Criteria	Grade (1 to 5)	Interviewer Initials	Summary
Case Management <ul style="list-style-type: none">• Following protocol• Attention to detail			
Goal orientated / Prior Success			
Sales Acumen			
Coachability			
Business & Credit Knowledge			
Customer Service			
Team Player			
Culture & Personality Fit			

Recommended Questions

Case Management

- What are the most cases you can handle yourself at any point in time?
- How do you organize yourself to manage several deals at the same time?
- How do you ensure your deals close by the target date?
- What is the biggest risk for a deal not closing?
- In this role, how would you go about collecting documents?

Goal Orientated / Prior Success

- What steps do/did you take to succeed in your current/previous position?
- When I speak with your prior supervisor, how will they describe your performance?
- How did you perform against expectations?
- How did you perform against your peers?

Sales Acumen

- Walk me through a sales call from your last job
- Give me an example of you closing a sale
- How would you overcome the following objections:

Coachability

- What is the last piece of feedback you received from a manager? How did you act on it?
- What are your three biggest weaknesses? What are you doing to improve on these areas?

Business & Credit Knowledge

- How do you measure the credit risk of a business?
- When evaluating a credit application, what are the things you'd review most carefully?
- Why would a business pay above an 8.5% interest rate for a loan?
- Why do you think many businesses face challenges when getting a loan from a bank?

Customer Service

- How would you set and manage the client expectations?
- How will you follow-up with clients who owe you documentation?
- Tell me about a time when you handled an upset client

Team Player

- What experience do you have working as a liaison between two parties?
- Tell me about a project you completed with a team.
- If I would ask one of your teammates, what would they say about you?
- How do you define a bad team?

Culture & Personality Fit

- What excites you about this position?
- What are the pros and cons of working with a start-up?
- How do you feel about being the first loan processor?
- What are you doing today to grow professionally?
- What do you seek to gain from this position?
- What do you need from your employer to be successful at your job?
- Where do you see yourself in 5 years?