

Customer Success Candidate Interview Process

HOW TO USE:

1. Make a copy of this document and modify the naming convention to include the candidate name
2. Fill in the candidates information, including a link to their LinkedIn profile
3. Upload their resume to the appropriate drive folder and add the link below
4. Make sure that everyone on the interview panel has edit access to this document
5. Capture information while you are speaking with the candidate and make sure that at the end of the interview please determine if we should move forward with this candidate
6. Once the interview is concluded and your notes have been add, please Slack the hiring manager so they can review your feedback

Getting Started:

Candidate Information	
Name:	
Email:	
Phone Number:	
LinkedIn Profile:	
Link to Resume:	
Role Applied For:	
Department:	
Budget for the Role:	
Hiring Manager:	
Internal Referral - Y / N:	

NOTES:

Interview Stage 1: Exploratory Discussion (25 min)

This first conversation is intended to align on the candidate's experience and their interest in the role. We will discuss [COMPANY NAME] as a business, brand and culture. During this discussion it's always important to understand their salary expectations as well as overall expectations.

Lead with gratitude. Thank the candidate for joining the call and their interest in the opportunity. Confirm that they have the appropriate time allocated to the conversation and outline the flow of the conversations.

Start the conversation by sharing an overview of the company - Talk through the culture, business and the role specifically. Make sure the candidate understands who we are and what we are building. Once you've shared this you can shift gears to the questions outlined below.

Interviewer Details	
Interviewer Name:	
Interviewer Title:	
Date/Time:	

Questions and Answers	
Tell me about your experience as it relates to the role we are hiring for.	
In your experience, can you share more detail about the types of customers you supported.	
Who were the personas you supported in your past? Marketers, Engineering, Sales, HR, Customer Success etc.	
Did you manage revenue in your previous roles? If so, please expand on this. Did you manage renewals, upsell, cross-sell, expansion etc.	
How technical were the products that you supported in the past? How technical were you required to be in order to support your customers?	

Do you have experience managing Onboarding?	
What are you looking for in your next opportunity?	
What attracted you to this opportunity?	
What type of leader are you looking to align yourself with?	
Can you describe the type of culture you thrive in?	
What do you love most about working in Customer Success?	
What do you love least about working in Customer Success?	
What are your compensation expectations in your next role?	

Allow time for the candidate to ask questions - Minimally 5 minutes.

Interview 1: Candidate Rating		
Yes, Proceed	Unsure / Maybe	No, Not a Fit

NOTES:

Interview Stage 2: CSP Deep Dive (50 min)

Behavioral style questions to help us understand your ability to properly support and engage your customers; Explore technical aptitude and determine experience alignment for the open role.

Interviewer Details	
Interviewer Name:	
Interviewer Title:	
Date/Time:	

Questions and Answers	
CSPs are responsible for supporting customers through change management; give me an example of how you've helped an organization change their operating model to drive business outcomes?	
We are looking for solutions oriented CSPs, can you please describe a process that you've identified was inefficient and how you mapped a solution and implemented it? What was the result?	
Customers often need hand holding when adopting new solutions; can you please tell me a time you had to take a very hands on approach with your customer - describe the process and the outcome.	
Tell me what role "discovery" plays in your customer success process. Give me an example of how you were able to provide more value for a customer as a result of conducting good discovery?	
How do you typically de-escalate a situation with a dissatisfied customer? Give me an example of a time you had to manage a customer objection.	
Describe the optimal customer	

journey.	
A big part of the CSM role is internal orchestration; tell me about a time where you had to manage an internal project with cross-functional teams. How did you get buy-in and execute?	
Tell me about a customer you lost. What happened, what could you have done differently and what did you learn?	

Allow time for the candidate to ask questions - Minimally 5 minutes.

Interview 2: Candidate Rating		
Yes, Proceed	Unsure / Maybe	No, Not a Fit

NOTES:

Interview Stage 3: Cultural Fit (25 min)

Understand how you navigate internal processes and challenges to drive outcomes; Assess your ability to work collaboratively in a high growth environment.

Interviewer Details	
Interviewer Name:	
Interviewer Title:	
Date/Time:	

Questions and Answers	
Tell me about a time where you had to get something done internally and there was no pre-existing process in place? What did you do and why?	
What tools and habits do you use to manage your day-to-day and week-to-week tasks?	
How do you prepare for customer meetings?	
How do you handle competing priorities? How do you determine the most pressing or critical priorities at a given time?	
How do you onboard yourself into a new role? Describe your process in detail?	
What unique strengths do you possess that will uplevel the skill set of the Customer Success team?	
Tell me about a time you had to lead a project with multiple internal stakeholders. Describe your cross-functional communication and approach to ensure the project was executed flawlessly and the team felt aligned.	

Allow time for the candidate to ask questions - Minimally 5 minutes.

Interview 3: Candidate Rating		
Yes, Proceed	Unsure / Maybe	No, Not a Fit

NOTES:

Interview Stage 4: Sales + Customer Success (25 Min)

Learn how you work and partner with the sales team; how do you manage and navigate commercial discussions, identify opportunities and uncover successful customers.

Interviewer Details	
Interviewer Name:	
Interviewer Title:	
Date/Time:	

Questions and Answers	
Sales and Customer Success often work very closely together, especially during the handoff process and customer kickoff. If you had to describe the ideal handoff process from Sales to CS what would it look like and why?	
Cross-sell is a collaborative motion between Sales and CS, where we use our existing relationship with a customer to gain access to a parent or subsidiary account. Please share with me an example of how you conduct research to get access to a parent or child account and then use your current customer to facilitate introductions.	
How do you collaborate with sales in your current role?	
It's not uncommon for a customer to need extra support or guidance when onboarding to a new solution. Give me an example of a time where you had to go above and beyond to ensure a customer's success.	
While retention is key to our long term success as a business, we need to make sure our customers grow with us. Tell me about a time where you were able to significantly grow an	

account. How did you identify the opportunity, develop you plan and execute?	
What do you see as the biggest point of friction between sales and CS and what would you do to minimize that?	
What are the most important KPIs for Customer Success to focus on and why?	
How do you access the potential of a customer?	

Allow time for the candidate to ask questions - Minimally 5 minutes.

Interview 4: Candidate Rating		
Yes, Proceed	Unsure / Maybe	No, Not a Fit

NOTES:

Interview Stage 5: Marketing + Customer Success (25 Min)

How do you partner with Marketing to leverage successful customers; partnership on Case Studies, advocacy programs, events and more.

Interviewer Details	
Interviewer Name:	
Interviewer Title:	
Date/Time:	

Questions and Answers	
How do you collaborate with Marketing in your current role?	
What role should Customer Success play in bringing a new product to market?	
Describe in detail how you support product releases in your current role?	
Customer advocates are our biggest sales engine; how do you go about building customers into advocates?	
Case studies are important tools to help current and future customers understand what's possible. Tell me about a time where you worked with a customer to achieve a goal and publish a case study. How did you manage this process and what was the benefit to your company and customer?	
Customer feedback is critical to the overall success of the partnership. How do you currently collect, manage and share customer feedback in your current role?	
Field marketing will eventually play a big role in how we connect with our customers. Please tell me about a	

customer event you were involved with - highlight the role you played in driving attendance, content development, customer engagement, etc.	
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Allow time for the candidate to ask questions - Minimally 5 minutes.

Interview 5: Candidate Rating		
Yes, Proceed	Unsure / Maybe	No, Not a Fit

NOTES:

Interview Stage 6: Presentation / Q&A (50 Min)

This interview is your opportunity to assess how the candidate thinks about account management while assessing the following: Presentation skills, call control, time management, strategic thinking, prioritization etc. The back half of the meeting will be for Q&A.

Interviewer Details	
Interviewer Name:	
Interviewer Title:	
Date/Time:	

Assessment	
Kickoff:	
Presentation Skills:	
Strategy:	
Prioritization:	
Time Management:	
Tactics:	
Collaboration:	

Allow time for the candidate to ask questions - Minimally 20 minutes.

Interview 6: Candidate Rating		
Yes, Proceed	Unsure / Maybe	No, Not a Fit

NOTES:

All of the interview sages are complete. Please gather feedback from the interview panel and determine your path forward. Enter your name in the appropriate column below.

Final Decision		
Supportive	No Decision	Not Supportive

Final Notes and Feedback:

Congratulations! You have decided to move your candidate to offer. Please complete the details below and then reach out to present the offer.

Offer Details	
Title:	
Department:	
Hiring Manager:	
Salary:	
Variable:	
Start Date:	
Offer Status:	Accepted / Declined
Declined Reason:	

NOTES: