So You Want to Be a Finance Director

Keys to Successful Interviewing

Coaching Program
March 1, 2012
Coaching Program: 14th year as member benefit

Career Development Committee
What Finance Directors need to know

- Key skill sets you need to develop
- Information resources you need
About the Program

The 2010 CSMFO Coaching Program offers benefits for all CSMFO members. With convenient webinars, easy to access web materials, and one-to-one coaching (upon request), you can get the information and support you need. The CSMFO Coaching Program is a special service of CSMFO and the Career Development Committee. It operates with the generous contributions of time and insights from CSMFO members who volunteer their time as coaches.

Equipping You for the New Fiscal Realities

1. Complete the Financial Management Skills Inventory – Take a few minutes to assess where you are in your career development and areas in which you’d like to develop your skills further. Access the Resource Matrix for Finance Professionals to find the information and support you need.

2. Join the informative webinars with panels of master coaches. See the CSMFO calendar for dates and times. (Check for podcasts and audio recordings of these sessions.)

3. One-to-One Coaching – Team up with a volunteer coach for support in your career. Members can benefit from coaching at any stage of their careers. Read the ABCs of One-to-One Coaching” and “Being a Great Coach and a Winning Player” and then go to the Coaches Gallery to review master coaches who have offered to provide one-to-one coaching on a volunteer basis.

4. Use Personal Productivity Tools – Access tools top executives use to enhance their management performance and personal satisfaction.

- Managing Your Priorities, Delegating, and Personal Balance
# Financial Management Skills Inventory

**Name:** ____________________________  **Agency:** ____________________________

**Current Position:** ____________________________  **Career Target:** ____________________________  **Date:** ______

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# Resource Matrix for Municipal Finance Professionals

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# Resource Matrix for Municipal Finance Professionals

## Resources by Functional Area

See last page for full names of abbreviated organizations

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If you don’t know and can’t find it …

… ask for help

- at your CSMFO Chapter
- through CSMFO One-to-One Coaching
So You Want to be a Finance Director...

Keys to Successful Interviewing

TB&Co.
Your Executive Search Solution
If you’re an awesome candidate, we assume…

- High performer
- Well educated & trained
- Engaged in the profession
- Good mentor & mentee
- Fabulous reputation
The “New” Ideal Candidate

- Positive Attitude/Optimistic
- Versatile
- Comfortable with Change
- Understand ROI
- Sophisticated Problem Solver
- Sharp Political Acumen
The “New” Ideal Candidate

• Resilient
• Effective Communicator
• Likes/Not Intimidated by Public Engagement
Interview Like a Rock Star

Top 10 Interview Taboos
Interview Taboos

#1 Culture violation
#2 Insufficient research
#3 Don’t answer the questions
#4 Talk over the questioner
#5 Judge the questions
Interview Taboos

#6 Nervous laughter
#7 Negative body language
#8 Poor eye contact
#9 Enter as an victim – first impression
#10 Exit as an underdog
Goal of the Interview
Contact

Teri Black
info@tbcrecruiting.com
www.tbcrecruiting.com

📞 310.377.2612
So You Want to be a Finance Director?

10 KEYS TO UNSUCCESSFUL INTERVIEWING

And suggested Worst Interviewing Practices (WIPs)

Presented by Ken Hampian
Disclaimer: Any resemblance to actual events or real persons, living or dead, is purely coincidental (although ridiculously common)
Five UNsuccessful Basics

1. Time Sensitivity
2. Job Interest
3. Self Interest
4. Trustworthiness, Maturity
5. Social Skills
1. Time Sensitivity

**Key:** Ramble and be oblivious to time

**WIPs:**

If allowed 30 minutes for the interview, take 10 minutes to answer the first question.

Use the remaining 20 minutes to challenge the panel by wandering off topic.
2. Job Interest

**Key:** Convey little passion for the job, organization and community by revealing lazy interview preparation

**WIPs:**

When probed about preparation, pause, then say:

*I reviewed your website and it's very cool!*

Deflect probing follow-up questions by complimenting the panel for asking probing follow-up questions.
3. Self-Interest

**Key:** Demonstrate a zesty passion for your material and personal interests

**WIPs:**

Prematurely ask about compensation

Set your “work-life balance” boundaries

**Special Note:** Enhance these WIPs by misdirecting them to an outside interview panel
4. Trustworthiness, Maturity

Key: Hoist big red flags about judgment, loyalty, and teamwork

WIPs:

Take credit for everything good about your current/past jobs

Mistake, What-Have-You Learned Question?

Don’t answer it; or relate a major blunder with no redeeming lesson; or blame others
5. Social Skills

**Key:** Exude a lack of self awareness and social skills; create uncomfortable and awkward moments for the interviewers

**WIPs:**

If a natural introvert, slouch, have poor eye contact, punctuate with nervous laughter

If a natural extrovert, be extremely hilarious, flippant, cocky and share TMI
Three UNsuccessful Strategies for the Finance Pro

6. Communication and Translation
7. Management Perspective
8. Leadership, Political Savvy

Our only problem is figuring out how to switch these
6. Communication, Translation

**Key:** Promote your inability to communicate, translate for non-finance stakeholders (e.g. elected officials, citizens, media, staffers)

**WIPs:**

Relentlessly use jargon and acronyms during the interview (BANs, GANs, TRANS, ERAF, GAAP, LAI F, MOE, CSMFO)

Describe the Triple Flip in painstaking detail
7. Management Perspective

**Key:** Flaunt an infatuation with numbers and things, not people and organizations

**WIPs:**
Redirect questions about relationships and goals, performance evaluation, discipline, and resource management to....

...the fond use of Excel spreadsheets
8. Leadership, Political Savvy

**Key:** Radiate a bean-counter (or finance geek) persona at all times

**WIPs:**

Exude technical obsession, coupled with…

…especially poor answers to questions about teamwork, leadership, public policy, citizen engagement, and council relations
Two Nails for the UNsuccessful Coffin (post interview)
9. Nail #1: Immediate Post Interview

**Key:** Reinforce a lack of social skills and genuine job interest

**WIPs:**

Make an abrupt, awkward exit

Do not send a thank you letter

Be hard to reach
10. Nail #2: The Longer Term

**Key:** Assure that you will never be invited back; learn nothing.

**WIPs:**
- Call, complain about not being selected; point out their big, regrettable mistake
- Do not ask how you could have done better!
City of Sandcastle
Director of Finance

- Coastal community pop. 20,000
- Full service except for Fire/EMS
- $32M Gen. Fund/ total budget $60M
- No RDA
- Structural deficit of $1M
- Reserve policy of 20% (currently maintaining 15%)

- Replacing long-term Director
- Need for fresh look & possible reinvention
- Tension b/w staff and divisions
- Depts. complaining about poor service
- Council wants to dip into reserves to address deficit
Resume Highlights

Drew Corbett
City of Sunnyvale
March 1, 2012
Current Job

- **Budget Manager, City of Sunnyvale**
  - **Budget**
    - $250M+ annual budget; 20-year financial plans
  - **Accounting**
    - Financial statements and CAFR
  - **Payroll**
    - Paychecks for 1,200+ regular/temp employees
  - **Accounts Payable**
    - Process 30,000 invoices annually
Previous Experience

- Budget Analyst, City of Sunnyvale
  - Day-to-day division operations
  - Budget development
    - Operating/capital
    - Long-term financial plans
    - Revenues and fees
  - Analytical work related to City-wide issues
    - Pensions/OPEB
    - Salary negotiations
Previous Experience

- Senior Financial Analyst/Project Manager, Intel Corporation
  - Variety of roles and responsibilities
    - Forecasting and close process improvement
    - Web-based cost estimate tool design, development, and implementation
    - Relocation provision design and implementation
Education

- MBA, University of Wisconsin-Madison

- BA, Political Science, The University of the South (Sewanee, TN)
Resources

Tap the CSMFO Coaching Program resources to help you at any stage in your career:

– Financial Management Skills Inventory
– Resource Matrix
– Webinars and hot topic calls + digital archives
– One-to-One Coaching with volunteers.

www.csmfo.org/coaching
Contacts for Today’s Session

- Ronnie Campbell, Finance Director, Camarillo; rcampbell@ci.camarillo.ca.us
- Teri Black-Brann, Executive Recruiter, teri@tbcrecruiting.com
- Ken Hampian, retired City Manager, San Luis Obispo kchampian@charter.net
- Drew Corbett, Budget Manager, Sunnyvale dcorbett@ci.sunnyvale.ca.us
- Don Maruska, Director, CSMFO Coaching Program CSMFO@DonMaruska.com
INTERVIEWING SKILLS: A FEW RULES OF THUMB

Getting the Interview

- Prepare a cover letter and resume that are tailored to the job
- Make sure the letter and resume are neat, clear and error free
- Don’t rely only on internet or email communication
- A telephone call might be the thing that differentiates you from other candidates; maybe even a brief pre-visit to the worksite if appropriate
- But don’t be a pest…

Preparing for the Interview

DO YOUR HOMEWORK! Thoroughly research the organization and the job – and not only via the internet. Talk to people in related jobs, for example. Come into the process ready with thoughtful answers to these questions:

1. Why are you interested in this job?
2. What have you done to prepare for this interview?
3. Based on your preparation, why do you think you are a good match for the job?

Suggestions: Be ready to answer these questions with insight and confidence – but with humility, too. Employers don’t expect you to walk in knowing everything about the organization, themselves or the job (and acting like you do would not be cool). However, they will want to know that you have done your homework, can express specific reasons for your job interest, and have the qualities and skills that they want and need.

Be ready to answer questions along the line of:

1. What is your greatest strength - and weakness?
2. What has been your greatest success – and your biggest job-related mistake or failure?

Suggestions: While one might question the wisdom of asking a prospect to admit weaknesses or errors, these questions are frequently asked – so be ready for them. Discuss #1 in terms of an area that you would like to develop further (ditch the obligatory “I work too hard” response); for #2, briefly share a story that ends with a “lesson learned” – and by sharing it with a dash of self-aware humor you will come across as honest, real and human.

3. The most common last interview question: Is there anything else that you would like to add about your qualifications or any questions that you might like to ask us?

Suggestions: Use this question mostly to make a strong closing statement (that could include a subtle clarification or reinforcement of anything you didn’t answer very well earlier). Regarding asking questions, if you are involved in a highly organized process with a time limit, go easy on the questions – two or three are enough. If the interview is less formal and the interviewer seems eager to elicit questions, then continuing the conversation with a few questions is fine. Your questions should be thoughtful and reinforce the knowledge you already have about the job. Compensation related questions should be deferred until the job offer stage.
The Interview

Overarching Suggestion: Now that you have prepared, relax and be yourself. If it is meant to be, it will be. If not, your destiny is elsewhere. Show high interest and be a good listener – but don’t project desperation and extreme nervousness. Like a first date, the interview is a two-way street – and interviewers are a bit nervous, too. They feel better with candidates who are comfortable in their skin. Also like a first date, it will help to know that you have other options (so have more irons in the job-hunting fire).

Some Best Practices:

- Show up early (never be late!)
- Dress well and appropriate for the job and organizational culture. If unsure, err on the side of being a bit over-dressed – and under-perfumed (avoid cologne/aftershave!)
- Sell yourself first; defer more detailed questions until a second interview
- Stay poised (even if you have to fake it) – maintain good posture, eye contact
- If you don't understand a question, ask for it to be repeated or clarified (it’s okay to do this once or twice – just don’t do it over and over)
- Offer specific answers and examples to bolster your points
- Demonstrate that you are good listener, too

Some Worst Practices:

- Being oblivious to the time (If you have 30 minutes for the interview, and take 10 minutes to answer the first question, you've already lost it).
- Prematurely asking about compensation or “work-life balance” issues
- Badmouthing your former organization, boss, professor – other people in general
- Vague, wishy-washy, rambling answers; guessing
- Acting overly familiar, flippant, trying too hard to be funny
- Losing train of thought multiple times; wandering off on tangents and side-stories
- Taking credit for everything (or nothing)
- TMI – Too Much Information (bringing up unnecessary personal stuff)
- Slouching, mumbling, poor eye contact, nervous laughter
- Projecting even a tiny bit of arrogance

After the Interview

- Send a thank you note shortly afterward. The use of email is fine, but craft it as a formal communication (neat, error free, etc). If there was something in the interview that left you feeling uncomfortable, consider including a thoughtful, non-defensive clarification in this follow-up note.
- If your chances look good, give your references a heads up that they may be called.
- If you are rejected, considering calling to find out how you could have done better.
- And remember: Things usually work out for the best, so if you don’t get the job, just keep going, keep hustling, keep improving – never give up!
POSSIBLE INTERVIEW QUESTIONS - FINANCE DIRECTORS

1. What have you done to prepare for this interview, and based on your preparation, why are a good match for the job and the organization?

2. Tell us who you are – your professional history in a 3 minute “public comment” period!

3. What strategies do you use to translate complex financial information for council members, the public, and non-finance staff members?

4. Tell us about a citizen engagement process that you have lead – what was the issue, why did you use engagement, what was the outcome?

5. What has been your greatest success – and your biggest job-related mistake or failure? And what did you learn from both experiences?

6. Some managers perform more at the executive level – delegating, reviewing the work of others, working with other managers. Some are more hands-on. Where are you in a continuum ranging from executive director to hands-on manager?

7. Share with us your experiences in managing costs, controlling budgets and building new revenue streams – have you done anything innovative to help your organization better manage its resources?

8. Trust is taking a beating in our culture these days, particularly in government. In what ways do you work to promote trust - both externally and internally - in your City’s financial management practices?

9. Tell us your most impressive “turn around” story to date. (An area where you took the initiative to improve or change something that resulted in greater efficiency, cost savings, improved service, etc.)

10. How would your former council members and department heads describe your management style? If they could change one thing about your style, what do you think it would be and why?

11. What pushes your buttons?

12. Describe yourself in one word.

13. How often and in what ways have you worked with city council members or other elected & appointed officials? Based on your experience, what guiding principles do you use to ensure an effective working relationship with elected officials?

14. Is there anything else that you would like to add about your qualifications or any questions that you might like to ask us?