|  |  |
| --- | --- |
| Candidate Name: |  |
| Interviewer’s Name: |  |
| Date: |  |
| Candidate’s Salary Requirements: |  |
| Candidate’s Residence Address: |  |

**CONTROLLER CANDIDATE RATING FORM**

**EXPERIENCE (AND INTERVIEW GUIDE—ASK QUESTIONS THAT HELP YOU RATE THIS SECTION)**

This section is to assess candidates verified experience, primarily through stories of what they actually did in prior employment. This is NOT for impressions, or to assess candidate’s CLAIMS to be able to do certain work. *Give a 5 if quite similar and relevant (good). Give a 3 if “somewhat”. Give a 1 or zero if not relevant.*

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| --- | --- |
| Verified past experience about: | Rating: 5=Very relevant, 1=missing/not relevant |
| Technical accounting and finance skills. SOX, key controls |  |
| Admin Skills: Payroll systemsPayroll managementBenefitsBenefit renewalsBusiness insurance |  |
| Compliance Skills (equity and equity admin, compliance-business license, property taxes, sales and use tax, Delaware Franchise tax) |  |
| Leading and supervising a small team & supporting them, especially in hectic times or while sharing resources. |  |
| Performance reviews, train, feedback on performance, hiring and firing of direct reports. |  |
| Dealing with external parties such as CPAs, bankers, auditors, VCs. |  |
| Working with and supporting peer leaders in the organization and lower level leaders also. |  |
| Ability to manage hard-to-manage people like salespeople, aggressive CEOs, etc. |  |
| Their experience in business planning, budgeting, forecasting, other forward looking activities. |  |
| Their experience with ERP systems, i.e. NetSuite, SAP, QuickBooks. Both running them and upgrading to them. Details please. |  |
| Longevity in prior positions. Reasons. |  |
| Their experience in dealing with CEOs and other leaders who don’t see the value in abiding by GAAP. |  |
| Their experience managing cash in difficult situations (short runway, stretching vendors, etc.) |  |
| Leading cross functional teams where you didn’t have authority to direct everyone, but were responsible for the results. Project managing across departments/vendors. |  |
| Their experience in managing your teams to place data in approved places (Box, Dropbox, CRM, etc.) |  |
| Tell us about how you adapted to new processes at your new jobs throughout your career. Did you change them, or did you have to adapt? |  |
| What responsibilities/relationships did you own and drive in the past? VS. the CFO or others? |  |
| When have you had to multi-task and juggle multiple priorities most intensively? How? |  |

**CASE STUDY**

Tell these stories in a non-judgmental way (no attitude). Just give the facts. Then ask what they would do if they were at Engine Room, and why. Alternatively, write down the facts and give the candidate the write-up. Limit it to ¼ of a page write up. Candidate responds orally. We are assessing their thinking and their approach. *Scale of 1 to 5, as above, with 5 being great.*

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| We are responsible for closing the books and reporting the financials by the 15th of every month, but increasingly, the provision of data from the business (expense reports, pre-billing, turning in of coded AP) is later and later, endangering your ability to hit your deadline. |  |
| You’ve supplied the typical, requested data for the upcoming board meeting with the VCs, but then, two days before the meeting, the CEO demands significantly more information which we can’t supply in the form he demands. |  |
| Your team makes a mistake. We mess up on paying vendors—late payments or incorrect. The vendor calls the CEO and complains, who then calls you and demands an answer. How do you handle it? |  |

**IMPRESSIONS**

|  |  |
| --- | --- |
| Attribute | Rating and Comments (5=great, 1=poor) |
| Can they manage/lead a small team? Strong enough? |  |
| Technical accounting abilities |  |
| Understanding of cash management |  |
| Ability to act in finance role, supplying forecasts, etc. |  |
| Gravitas for interacting with the outside world (CPA, banks, vendors, etc.) |  |
| Cultural Fit |  |
| Our ability to retain them long term |  |
| IT savviness-comfort and skill levels |  |
| Communication (written and verbal) |  |
| Presence and social ability. Do they look and act the part? |  |
| Do they bring a new competency to the Engine Room? |  |
| Would I enjoy working with them? |  |
| Project management. Sense of ownership. |  |
| Integrity/Honesty. Bold enough to state the facts, even if uncomfortable? |  |

After this interview, should we proceed with the process? [ ]  Yes [ ] No

**If you like them, tell them so, and tell them about these next steps.** Check the box to confirm you told them to expect these things:

[ ] Send us work references who you worked with and who will talk to us.

[ ] On-line assessment

**SUMMARY AND NOTES:**