

CANDIDATE	INTERVIEWER	DATE	STAGE
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INTERVIEW QUESTIONS · INSURANCE ADVISOR

1	How many years of experience do you have advising clients on their insurance needs?	1 2 3 4 5	
2	Are there any areas of personal or commercial insurance that you specialize in?	1 2 3 4 5	
3	Do you understand all relevant state and federal laws regarding insurance policies?	1 2 3 4 5	
4	Can you provide references from current and former clients who can attest to your work quality and customer service skills?	1 2 3 4 5	
5	What do you consider to be the most important factor when advising clients on their insurance options?	1 2 3 4 5	
6	Do you have experience working with a team in an insurance environment?	1 2 3 4 5	
7	What techniques do you use to stay up-to-date on changes in the insurance industry?	1 2 3 4 5	
8	How would you handle a client who is seeking coverage that falls outside of your expertise?	1 2 3 4 5	
9	Do you have experience evaluating and recommending new types of insurance products to clients?	1 2 3 4 5	
10	Are you comfortable with developing and implementing marketing strategies for insurance products?	1 2 3 4 5	

OVERALL ASSESSMENT

CRITERIA	SCORE (1-5)	NOTES
Educational Background Appropriate qualifications or training for the position.	1 2 3 4 5	
Prior Work Experience Skills or qualifications acquired through past work.	1 2 3 4 5	
Qualifications / Experience The technical skills the position actually needs.	1 2 3 4 5	
Problem Solving Abilities Demonstrated critical problem-solving.	1 2 3 4 5	
Communication Team building and communication skills.	1 2 3 4 5	

CRITERIA	SCORE (1-5)	NOTES
Organizational Fit Would this hire steer the organization the right way?	12345	
Directional Fit A step forward, or backward, in their career?	12345	

RECOMMENDATION

☐ Advance ☐ Hold ☐ Decline

1 = well below the bar · 3 = meets it · 5 = clearly above it

AvaHR — hiring software for teams without a recruiter
Use the same scorecard for every candidate in this role.