

AIDA JOB SERVICES

Hiring Panel Interview Guide

Salesforce FSC Delivery Lead

Cascadia Trust - Hiring Panel Edition

Screening Guide for a 10-Candidate Slate



Role Mandate & What Success Looks Like

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition

WHY THIS ROLE EXISTS, AND WHAT YOU'RE SCREENING FOR

This posting reads as a governance-and-delivery mandate wrapped around a technical one. The requirements lead with 10-12+ years of overall IT experience and Salesforce FSC depth, but the responsibilities section is almost entirely about stakeholder management, requirements ownership, risk/dependency tracking, and executive-level reporting, not hands-on configuration. You're screening for someone who can sit between business, technology, and vendors on a large Salesforce transformation and be trusted to push back when scope, quality, or timeline are at risk, not just someone who can build the FSC data model.

WHAT THE JOB DESCRIPTION FLAGS AS HIGH-STAKES

1

Pushback Expected

The posting explicitly calls out "ability to challenge requirements and provide appropriate pushback." Most delivery-lead postings don't say that out loud -- the team has likely felt the cost of a delivery lead who couldn't hold a line with the business before.

2

Governance Over Configuration

The responsibilities section is almost entirely stakeholder management, requirements ownership, risk/dependency tracking, and executive reporting, not hands-on Salesforce configuration.

Panel Assignments & Calibration (1/2)

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition - what each seat should probe for, and how to calibrate

WHO'S IN THE ROOM, AND WHAT EACH SEAT IS CHECKING FOR

Delivery / Program Director, Wealth Management Technology

Likely hiring-manager seat

Probe for: A real track record turning around at-risk delivery, and comfort owning executive-level status reporting.

Calibration: Listen for delivery outcomes and governance discipline, not tooling detail. Can't speak plainly to reporting bad news upward? That's a flag here.

Enterprise / Solution Architecture stakeholder

FSC integrations

Probe for: Real evidence of Salesforce-to-external-system integration work (APIs, middleware), named specifically.

Calibration: Push past a generic first answer -- ask which systems, what it enabled, what broke. Naming a real limitation beats a clean, vague success story.

Panel Assignments & Calibration (2/2)

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition - what each seat should probe for, and how to calibrate

WHO'S IN THE ROOM, AND WHAT EACH SEAT IS CHECKING FOR

Wealth Management business sponsor / product owner

Business-side seat

Probe for: Proof the candidate can run requirements sessions directly with wealth advisors and senior stakeholders, not just IT.

Calibration: Ask for one specific example of aligning business, tech, and vendors under one delivery standard. Only-my-team answers miss the point of this seat.

Employer & Competitive Landscape

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition

WHAT'S GOING ON AT THIS COMPANY, AND HOW IT COMPARES

- Cascadia Trust's own public marketing doesn't mention Salesforce, CRM, or wealth-management technology by name -- none of it is Cascadia Trust-specific.

Company	Public evidence	Read
Meridian Wealth Management	Public Salesforce Financial Services Cloud case study: consolidated 26 separate systems into one FSC platform.	92% increase in daily Salesforce logins, 200% increase in opportunity pipeline, client-meeting prep cut from 3-4 hours to one click.

If a direct competitor has already proven this result out publicly, a strong candidate for this seat should recognize it unprompted -- that's part of what the closing question on the next-to-last slide is checking for.

Core Competencies to Screen For (1/3)

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition - generalized across any candidate for this seat

WHAT TO LISTEN FOR, AND THE RED FLAG THAT SAYS OTHERWISE

01 Delivery Governance Under Pressure

Strong signal: a specific, recent example of taking over an at-risk or troubled program, with a concrete mechanism they personally introduced (a tracking system, a reporting cadence, a scope decision) and a real timeline. **Red flag:** vague ownership language ("we turned it around") with no specifics on what they personally did differently.

02 Stakeholder Alignment Across Business, Tech, and Vendors

Strong signal: a concrete story spanning all three groups on one program, with specifics about what changed because of their coordination. **Red flag:** an answer that only describes managing an internal team, with business and vendor relationships never mentioned.

Core Competencies to Screen For (2/3)

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition - generalized across any candidate for this seat

WHAT TO LISTEN FOR, AND THE RED FLAG THAT SAYS OTHERWISE

03 Real Integration Delivery, Not Just Configuration

Strong signal: specific technical detail about a system-to-system integration they owned (named systems, APIs, or middleware) and the business outcome it unlocked. **Red flag:** generic Salesforce admin/configuration language with no integration specifics when asked directly.

04 Willingness to Push Back on Scope

Strong signal: an honest, specific story about holding a line on requirements or scope, including what it cost them to do it and what happened as a result. **Red flag:** every "did you push back" question gets reframed into a story about how agreeable and accommodating they were.

Core Competencies to Screen For (3/3)

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition - generalized across any candidate for this seat

WHAT TO LISTEN FOR, AND THE RED FLAG THAT SAYS OTHERWISE

05 Executive-Level Reporting Fluency

Strong signal: description of an actual reporting artifact or cadence they built or ran that gave leadership early visibility into risk. **Red flag:** reporting described only as "status updates in meetings," with no artifact, dashboard, or example of surfacing a risk early.

Suggested Behavioral Questions

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition - with strong-answer and red-flag signals for each

Panelist	Question	Strong signal / red flag
Hiring Manager	Tell us about a time you took over a program that was at risk or already in trouble.	Strong: a specific mechanism they introduced, a real timeline. Red flag: vague "we turned it around," no specifics.
Hiring Manager	How do you manage stakeholders across business, technology, and vendors on a large program?	Strong: names all three groups, a coordination example. Red flag: only describes managing an internal team.
Architecture	Describe your experience integrating Salesforce with other systems.	Strong: names real systems, the outcome unlocked. Red flag: generic "I've done integrations," no specifics.
Business Sponsor	This role needs someone who can push back on requirements when needed. Tell us about a time you did that.	Strong: a specific, uncomfortable moment, a real outcome. Red flag: reframes as always finding a way to say yes.
Architecture	Walk us through how you'd approach requirements gathering in a regulated financial services environment.	Strong: diagnosis-first, roadmap-second, regulatory-aware. Red flag: jumps to solutioning, ignores constraints.
Hiring Manager	What's your approach to executive-level status and governance reporting?	Strong: a real artifact or cadence that surfaced risk early. Red flag: "weekly status emails," no real example.

Running a Fair Process

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition

HOW TO KEEP TEN CONVERSATIONS GENUINELY COMPARABLE

You're running this same conversation ten times. The panel's job is to make the tenth interview as sharp and as fairly judged as the first, which takes a little discipline the process doesn't enforce on its own.

Score each candidate against the five competencies on the previous slide independently, before comparing notes with other panelists -- an early strong or weak impression from one interviewer shouldn't anchor the rest of the panel's scoring. Ask every candidate the same closing question, verbatim (next slide), so panel notes stay genuinely comparable across all ten conversations, not just similar in spirit. And debrief each candidate within 24 hours of their interview while specifics are still fresh; hold the comparative ranking conversation only once all ten are done, not as you go.

The Closing Question

Salesforce FSC Delivery Lead - Cascadia Trust - Hiring Panel Edition

ASK IT VERBATIM, TO EVERY CANDIDATE

"Meridian's public Salesforce FSC work reportedly cut client-meeting prep from hours to a single click and meaningfully grew advisor pipeline. A year into this role, what would tell you we'd achieved something comparable?"

Ask: this same question, verbatim, of every candidate. A generic answer ("I'd focus on user adoption") tells you the candidate hasn't engaged with the actual competitive benchmark you gave them. A strong answer engages with the specific metric -- pipeline growth, meeting-prep time, adoption -- and names what they'd actually track to know it's working.

Because every candidate gets the identical question, it's one of the few points in the process where you can compare ten answers apples-to-apples rather than relying on each panelist's subjective read of a different conversation.