

3-STEP INTERVIEW GUIDE

HVAC & Mechanical

A practical hiring framework

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Specialized Recruiting for the Commercial Trades

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How to use this guide

Commercial HVAC and mechanical contracting requires technical depth, credential verification, and an understanding of where a candidate fits on the service-vs-install-vs-management spectrum. This guide gives you a structured way to evaluate every phase of the hire.

This guide is structured around three phases:

- Phase 1: Phone Screen — 20-30 minutes. Goal: qualification and basic fit. Decide whether to advance.
- Phase 2: First Interview — 60 minutes. Goal: deep technical and motivational fit. Decide whether to bring to final.
- Phase 3: Final Interview — 60-90 minutes. Goal: culture fit, team alignment, decision.

Each phase has a question framework with industry-specific probes plus role-specific question banks called out where relevant. The Culture Fit Conversation Guide lives in Phase 3. The Scoring Rubric in the appendix gives you a 1-5 framework to compare candidates consistently.

Three principles before you start

1. The interview is a recruiting tool, not just an evaluation tool.

In HVAC and mechanical, the candidates worth hiring know they have options. The interview is your chance to demonstrate competence, respect their time, and give them a clear picture of what your firm is like to work for. Run it like the recruiting tool it is.

2. Verify what you can verify.

Credentials, certifications, license status — verify these. Don't take a candidate's word for current NICET levels, EPA certifications, or state licenses. The candidates who are casual about credentials they don't actually hold are the ones who'll be casual about other things later.

3. Hire for the work, not the resume.

A great resume from a name-brand firm doesn't always translate to a great hire. Probe for the specifics. Ask 'walk me through' questions. The candidates who can describe their work in concrete terms are the ones who actually did it. The ones who give generic answers are usually filling in for someone else's experience.

The interview philosophy

The commercial HVAC and mechanical trade has a generational replacement crisis underway. More than half the workforce is over 45. The candidates worth hiring know it — and they know they have options. Run an interview process that respects their time, demonstrates competence on your end, and signals what kind of firm they're joining. The interview itself is part of the recruiting pitch.

What this guide will not do

- Replace your judgment. The questions and frameworks here help structure the conversation — they don't make the decision for you.
- Eliminate bias. Structured interviews reduce bias significantly, but they don't eliminate it. Stay aware of where your gut reactions are coming from.
- Guarantee a hire works out. Even great interviews produce occasional misses. The goal is to dramatically reduce the misses, not eliminate them.

Time investment per candidate

Across all three phases — phone screen through final interview, plus debrief and scoring — expect 3-4 hours of senior team time per candidate that reaches final. That's why the phone screen matters so much: it's where you protect everyone else's calendar.

Phase 1: Phone Screen

Format

- Duration: 20-30 minutes
- Conducted by: Hiring manager or senior recruiter
- Goal: Qualification, basic fit, mutual interest
- Outcome: Advance to Phase 2, decline, or send to a different role

Opening (2-3 minutes)

Set the tone. Introduce yourself, briefly describe the firm and the role, and explain how the call will work. Something like:

"Thanks for taking the time today. I'm [Name], [Title] at [Firm Name]. We're a HVAC and mechanical contractor doing [scope]. The role we're talking about is [Role]. I'd like to use the next 20 minutes to learn about your background, answer your questions, and talk through whether this might be a fit. Sound good?"

Background and motivation (8-10 minutes)

1. Walk me through your career so far. What got you into the trade, and what's your trajectory been?

Listen for: Look for coherence and momentum. Strong candidates have a story that connects their decisions. Job-hopping without a thread suggests either a difficult-to-please candidate or a difficult work history.

2. What's prompting you to look right now?

Listen for: Listen carefully. The honest version of this answer often reveals more than they intend. Watch for blame patterns, unrealistic expectations, or signs of being managed out.

3. What kind of role and firm are you looking for next?

Listen for: Specificity matters. Candidates who can describe what they want — culture, scope, comp range, growth path — are usually clearer thinkers than candidates who say 'I'm open to anything.'

4. Tell me about your current or most recent role. What does your day-to-day look like?

Listen for: Real candidates can describe their actual work in concrete terms. Watch for inflation — claiming responsibility for things they were merely adjacent to.

Basic technical screening (8-10 minutes)

Three to four questions tailored to the role and trade. Don't go deep — that's Phase 2. The phone screen just confirms baseline competence.

1. Walk me through the last commercial project you worked on. What was the scope, and what was your specific role?

Listen for: Specifics over generalities. Real candidates name systems, equipment, manufacturers. Vague answers ('big project, lots of work') are red flags.

2. Tell me about a time you diagnosed a complex system problem. What was the issue, how did you troubleshoot, and what did the resolution look like?

Listen for: Methodical thinking. Good techs walk you through their diagnostic process step-by-step. Weaker candidates jump to the answer or describe what someone else figured out.

Compensation and logistics (3-5 minutes)

1. What's your current base compensation, and what would you need to make a move?
2. What's your availability — are you actively interviewing elsewhere?
3. What's your geographic flexibility? Are you open to relocation, or is this a local search?

If their comp expectations are dramatically outside your range, address it now. There's no point in continuing if the math doesn't work. Be direct: "To be transparent, our range for this role is \$X-\$Y. Is that a workable starting point for you?"

Their questions (3-5 minutes)

Always end the phone screen with their questions. The questions a candidate asks tell you a lot about how they think.

Strong signals:

- Questions about the work itself — what projects, what crews, what scope?
- Questions about the team — who would I report to, who's my peer group, what's the management style?
- Questions about growth — what does success look like in year one, year three?

Weak signals:

- Only compensation and benefits questions
- No questions at all ("You covered everything" — usually means they didn't engage)

- Questions that suggest they don't know what your firm does

Closing

Be transparent about next steps. "We're talking to several candidates this week. You'll hear from us by [day] one way or the other." Don't leave them hanging.

Phone Screen Decision Framework

Within 30 minutes of ending the call, capture your assessment. The longer you wait, the more details fade.

Quick check: Would I want this person on a 60-minute deeper interview? If yes, advance. If unsure, advance — Phase 2 is where ambiguous becomes clear. If no, decline. Don't pass marginal candidates forward 'to be nice.' That wastes everyone's time.

Phase 2: First Interview

Format

- Duration: 60 minutes
- Conducted by: Hiring manager + one senior peer (recommended)
- Format: In-person preferred, video acceptable
- Goal: Deep technical evaluation, motivational fit, probing for the things resume doesn't show
- Outcome: Advance to final, decline, or request a follow-up conversation

Opening (5 minutes)

Reintroduce, recap what was covered in the phone screen, set expectations for the hour. If two interviewers, both should briefly introduce themselves.

Deep technical conversation (25-30 minutes)

This is the heart of the interview. Use these HVAC-specific questions to probe for technical depth.

1. Walk me through the last commercial project you worked on. What was the scope, and what was your specific role?

Listen for: Specifics over generalities. Real candidates name systems, equipment, manufacturers. Vague answers ('big project, lots of work') are red flags.

2. What's your experience with controls and building automation systems? Specific manufacturers — Siemens, Honeywell, Trane, Johnson Controls?

Listen for: Hands-on experience with at least one major BAS platform is increasingly table stakes for senior roles. Surface-level familiarity is fine for techs; genuine depth is required for controls specialists.

3. Tell me about a time you diagnosed a complex system problem. What was the issue, how did you troubleshoot, and what did the resolution look like?

Listen for: Methodical thinking. Good techs walk you through their diagnostic process step-by-step. Weaker candidates jump to the answer or describe what someone else figured out.

4. What refrigerants are you certified to work with? When did you last renew your EPA 608 cert, and at what level?

Listen for: EPA 608 Universal is standard. If they're vague on the date or level, dig deeper — it's a federal requirement, they should know it cold.

5. Have you worked on chillers? What size, what type — air-cooled, water-cooled, absorption?

Listen for: Chiller experience separates senior commercial techs from generalists. If the role requires it and they don't have it, that's a knowable gap.

6. What's the most challenging system you've installed or commissioned? Walk me through what made it complex.

Listen for: Real complexity stories include specific equipment, coordination with other trades, schedule pressure, technical hurdles. Generic 'it was tough' answers don't tell you much.

7. How do you stay current on equipment changes, code updates, and new technology in the trade?

Listen for: Manufacturer training, NATE recertification, trade publications, peer networks. Candidates who don't actively stay current tend to plateau early.

8. Talk me through your experience with energy management, retrofits, or efficiency upgrades. Anything sustainability-focused?

Listen for: Increasingly relevant as commercial clients prioritize energy performance. Real experience with VRF, geothermal, or major retrofit projects is valuable.

Role-specific probing (10-15 minutes)

After the universal technical questions, drill into the specific role. Pick 2-3 questions from the appropriate role bank in the appendix at the back of this guide. The role-specific questions are where you find out whether a candidate has real depth in the specific job they're applying for.

Behavioral and motivational (10 minutes)

Three questions that reveal patterns rather than skills:

1. Tell me about a time you disagreed with your boss. How did you handle it?

Listen for: Strong candidates describe specific situations, the substance of the disagreement, and how they raised it professionally. Weak candidates either claim they've never disagreed (red flag) or describe situations where they were obviously right and the boss was obviously wrong.

2. Describe a time a project went badly. What was your role, and what did you learn?

Listen for: Strong candidates take ownership of their part. Weak candidates describe what other people did wrong without acknowledging their own contribution to the problem.

3. What's the hardest feedback you've ever received, and how did you respond to it?

Listen for: Self-awareness. Candidates who can describe legitimate weaknesses they've worked on are typically stronger long-term hires than candidates who deflect the question.

Their questions (10 minutes)

Give them real time. Phase 2 is where strong candidates ask hard, specific questions that signal serious interest.

Closing

Be transparent. If you're advancing them, say so. If you're declining, you can decline now or follow up — but don't leave them guessing.

Post-Interview Debrief

Within 24 hours, the interviewers should debrief together and complete the scoring rubric (appendix). Decisions made before the debrief tend to be biased toward the interviewer who spoke first or longest.

Phase 3: Final Interview

Format

- Duration: 60-90 minutes
- Conducted by: Senior leadership (often the President or VP) + cross-functional peers
- Format: In-person strongly preferred
- Goal: Culture fit, team chemistry, leadership alignment, decision
- Outcome: Offer or decline

What's different about this phase

Phase 3 is not about technical evaluation — that was Phase 2. The technical questions here are minimal. This phase is about:

- Culture fit — will this person thrive in your specific environment?
- Team chemistry — will the existing team work well with them?
- Leadership alignment — does senior leadership see what the hiring team sees?
- Decision pressure — can the candidate handle a final-stage interview that signals real interest from your firm?

Opening (5-10 minutes)

By Phase 3, the candidate has met multiple people from your firm. Use the opening to acknowledge the relationship building so far.

"You've spent some time with [Hiring Manager] and [Peer] over the past couple weeks. I want to use this time to talk about [the firm], where we're going, and whether you can see yourself being part of that. Sound good?"

The candidate's vision (15-20 minutes)

Three questions that surface how the candidate thinks about their career and your firm specifically:

1. Describe the kind of firm you'd want to work for in five years. Not the role — the firm. What's it like?

Listen for: This question separates candidates with strategic perspective from candidates who are just looking for the next job. Strong candidates describe culture, leadership style, scope, and growth in specific terms.

2. What questions about us do you still have? What do you need to know that you don't yet?

Listen for: By Phase 3, candidates should have substantive questions about strategy, leadership, growth plans, or specific challenges your firm is navigating. If they say 'I'm good, no questions,' they're either disengaged or being polite — neither is what you want.

3. What would have to be true for you to look back in three years and say this was the right move?

Listen for: Listen for specificity. Strong candidates can articulate what success looks like for them personally. Weak candidates give generic answers about 'making an impact.'

Culture fit conversation guide (20-25 minutes)

This is the heart of Phase 3. The goal is to evaluate culture fit through structured conversation — not by asking 'are you a culture fit?' (no candidate will say no) but by surfacing the patterns and preferences that predict whether someone will thrive at your firm.

Working style

1. Describe your ideal manager. Hands-on or hands-off? Direct or indirect?

Listen for: Listen to whether their description matches your firm's actual management style. A candidate who wants daily check-ins won't thrive in a hands-off culture, regardless of credentials.

2. When you've been most productive in your career, what was the environment like?

Listen for: Strong candidates describe specific environments and what made them work. Watch for mismatches with your firm — for example, a candidate who's been most productive in a slow-paced environment may struggle in a fast-paced firm.

3. How do you prefer to receive feedback?

Listen for: Some candidates want direct, immediate, unfiltered feedback. Others need it framed gently. Neither is wrong, but a mismatch with your team's feedback style creates friction.

Conflict and pressure

1. Tell me about the last serious workplace conflict you had. What was it about, and how did it resolve?

Listen for: Everyone has conflicts. Candidates who say they've never had one are either lying or have never engaged enough to disagree. Strong candidates describe specific conflicts and what they learned. Weak candidates describe conflicts where they were the victim of someone else's bad behavior.

2. When projects go sideways, what's your default response — push harder, ask for help, or step back to assess?

Listen for: There's no right answer, but match the answer to the role. A senior PM who 'pushes harder' without ever asking for help may burn out fast. A senior leader who 'steps back to assess' on every problem may not move fast enough.

3. Describe a time you were under significant pressure. How did you handle it?

Listen for: Specifics matter. Strong candidates describe specific situations, specific pressures, and specific responses. Watch for candidates who describe themselves as 'thrives under pressure' without examples — that's usually a self-image, not a track record.

Values and priorities

1. What's the difference between a great firm and an average firm to work for?

Listen for: Listen for what they value: leadership, autonomy, compensation, growth, mission, work-life balance, technical excellence. Whatever they emphasize tells you what they'll be looking for in your firm.

2. What kind of work makes you tired in a way that's energizing, vs. tired in a way that's draining?

Listen for: This is a deeper version of the 'what motivates you' question. The work that drains them is what they want to avoid. The work that energizes them is what they want to spend time on. Make sure your role has more of the latter than the former.

3. What's something you want to be true about your work that hasn't been true at previous firms?

Listen for: This is a powerful question. The answer reveals what they're hoping for in this move — and whether your firm can deliver it. If they describe something your firm doesn't offer, that's important to surface now.

HVAC-specific culture observations

Some industry-specific patterns to listen for during the culture fit conversation:

- HVAC technicians who came up in the trade tend to value being treated as professionals, not labor. Watch for signs the candidate has been at firms where that wasn't the case — and listen for what they hope is different about your firm.
- Service-side hires often have a customer-facing temperament that install-side hires don't always have. Probe for it deliberately.
- The trade has a strong veteran population. Many older techs have been through ownership changes, layoffs, or rough cycles. Acknowledge that experience and let them tell you what they've learned.

Closing the interview (5-10 minutes)

Be honest about timing. "You'll hear from us by [day] with a decision." Then make sure that's what happens.

If you know in the room that you want to make an offer, don't always blurt it out — but signal strongly. "This conversation has reinforced what we were hoping it would. We'll be in touch quickly."

Scoring rubric and decision framework

Use this rubric to evaluate candidates consistently. Score each category on a 1-5 scale. Total scores aren't decisive on their own, but patterns across the rubric should drive the decision.

Scoring scale

Score	Description
1	Significant concern. Below requirements for the role.
2	Some concern. Gaps that would require investment to close.
3	Meets requirements. Solid baseline for the role.
4	Exceeds requirements. Strong fit, will perform above average.
5	Exceptional. Top-tier candidate, will elevate the team.

Evaluation categories

Category	Weight	Description	Score
Technical depth	Heavy	Demonstrated depth in HVAC and mechanical-specific work. Specific equipment, systems, projects.	___ / 5
Role fit	Heavy	Match between the candidate's experience and the specific responsibilities of this role.	___ / 5
Communication	Medium	Clarity in describing complex work. Listening skills. Diplomacy when probed.	___ / 5
Leadership / collaboration	Medium	Adjusted by role — for ICs, collaboration; for managers, leadership of others.	___ / 5
Cultural alignment	Heavy	Working style, communication preferences, conflict patterns matched to your firm.	___ / 5
Motivation	Medium	Clarity on what they want next. Realistic expectations. Genuine interest in your firm specifically.	___ / 5
Credentials / certifications	Pass/fail	Verified credentials match the role requirements. No bluffing.	___ / 5

Decision framework

Use these patterns to translate scores into decisions:

Strong hire (offer immediately)

- 4 or 5 in Technical depth, Role fit, AND Cultural alignment

- No category scored below 3
- Credentials verified and meet requirements

Hire (offer after final discussion)

- 3 or 4 in Technical depth, Role fit, AND Cultural alignment
- At most one category scored at 2
- Credentials verified

Maybe (have a follow-up conversation or decline)

- Mixed scores with both 4s and 2s
- Cultural alignment unclear
- Some credential gaps that may be closeable

No hire

- Any category scored at 1
- Multiple categories at 2
- Credential gaps that don't have a path to closure
- Any pattern that suggests dishonesty about background

The most important rule: when interviewers strongly disagree about a candidate, that's data. The disagreement itself is information. Find out why one interviewer saw the candidate one way and another saw them differently. The truth is usually in there.

Appendix: Role-specific question banks

The 10 most-recruited positions in HVAC and mechanical, with 3-5 role-specific probing questions each. Use these in Phase 2 (First Interview) after the universal technical questions.

1. Commercial Service Technician

4. Walk me through how you'd troubleshoot a packaged rooftop unit that's not cooling.
5. What's your typical service van setup? Tools, instruments, parts inventory?
6. How do you handle a customer who's frustrated because their system has been down for hours?
7. What's your diagnostic approach when the symptoms don't match the obvious problem?

2. Commercial HVAC Installer

8. What's the largest installation you've been part of? How many techs on the crew, what was the timeline?
9. How comfortable are you reading mechanical drawings, ductwork shop drawings, and submittals?
10. Walk me through how you'd hang and seal a large rectangular duct run in a finished space.
11. What's your experience with refrigerant piping — brazing, pressure testing, evacuation?

3. Controls Technician

12. What BAS platforms have you programmed? Pull up a recent sequence of operations and walk me through it.
13. Describe a time you commissioned a system and discovered the controls programming didn't match the design intent. How did you handle it?
14. How do you approach integrating legacy controls with newer systems?
15. What's your experience with BACnet, Modbus, or LonWorks protocols?

4. Refrigeration Technician

16. What refrigeration applications have you worked on? Supermarket, cold storage, food processing?
17. How do you handle a leak in a charged ammonia or CO2 system?
18. What's your experience with low-temp applications, glycol systems, or rack systems?
19. Walk me through your last major service call on a critical refrigeration system.

5. Service Manager

20. How many service techs do you currently manage? What's your dispatch and scheduling approach?
21. Walk me through your KPIs — what do you track for service performance?
22. How do you handle a tech who's consistently underperforming on billable hours?
23. Describe how you'd respond to a major customer escalating about a service issue.

6. Project Manager

24. What's the largest project you've managed end-to-end? Budget, schedule, complexity?
25. How do you handle a project where the GC is changing scope mid-installation?
26. Walk me through how you manage submittals, RFIs, and change orders.
27. What's your approach to coordination with other trades on a complex commercial project?

7. Estimator

28. Walk me through your estimating process. Software, takeoff approach, pricing strategy?
29. How do you handle estimates with significant scope ambiguity?
30. What's your hit rate on bids, and how do you analyze losses?
31. Tell me about a project where your estimate was significantly off. What did you learn?

8. Mechanical Engineer (HVAC Design)

32. What design software do you use? AutoCAD MEP, Revit, Trace, HAP?
33. Walk me through your load calculation methodology for a commercial building.
34. How do you balance energy efficiency, first cost, and operating cost in your designs?
35. Are you a licensed PE? In what states?

9. Foreman / Field Supervisor

36. How many people do you typically lead onsite? What's your management style?
37. Walk me through your morning — how do you start a day on a commercial install?
38. How do you handle a crew member who's not pulling their weight?
39. Describe a situation where you had to push back on a GC's schedule demand.

10. Operations Manager / Branch Manager

40. What's the size of the operation you currently run? Revenue, headcount, geography?
41. How do you balance service, install, and special projects in your business mix?
42. Walk me through your approach to setting and hitting financial targets.
43. How do you develop the next layer of leadership beneath you?

Appendix: HVAC credentials to verify

These are the credentials, certifications, and licenses to verify during the interview process. Don't take a candidate's word for any of these — verify directly with the issuing body, the previous employer, or by reviewing the actual document.

- EPA 608 Refrigerant Handling certification (Universal level expected for commercial work). Verify level and renewal date.
- NATE certifications (Air Conditioning, Heat Pumps, Gas Heating, etc.). NATE adds 8-12% to base comp on average.
- State HVAC contractor or technician license, if applicable in your state.
- OSHA 10 or 30 (rooftop and confined space work increasingly requires this).
- Manufacturer-specific training certifications (Carrier, Trane, Daikin, etc.).

How to verify

- Ask the candidate to bring or send copies of credentials before the final interview
- For state licenses, look up status directly on the state licensing board's website
- For NICET, EPA 608, or similar national certifications, you can verify through the issuing body's online verification system
- For manufacturer certifications, contact the manufacturer's training program
- If a credential is critical to the role and can't be verified, treat that as a hard stop

A final note

Hiring is hard. The interview is your best chance to make a good decision before you make a commitment that's hard to undo. Use this guide to structure the conversations, but trust your judgment when the data is unclear.

If a candidate looks great on paper but something feels off in person, that signal is worth taking seriously. If a candidate looks marginal on paper but shows up better than the resume suggests, that's worth taking seriously too. The interview is your chance to see what the resume doesn't show.

Run the process well, respect the candidate's time, and make decisions decisively. The candidates worth hiring are watching how you run this process — and they'll judge your firm by how you run it.

Good luck with the hire.

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