



# Staff Selection and Training Tools in the New Tech Era

*Presented by:*

**Karen Zupko**  
President



KARENZUPKO & ASSOCIATES, INC.

# DISCLOSURE

- Karen Zupko and her team provides office consultation for practices.
- Karen Zupko & Associates, Inc. makes hiring assessment tools available and background checks.

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8 Employees with 18+ Years of Service



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Feedback



# CLASSIFIEDS

## BUSINESS

Cum socios natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec diam tellus, facilisis nec tortor ut, semper interdum quam.

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# Hire Smarter!



**Staff are either the  
largest overhead cost**



**or**

**the best investment  
in your success!**



# SWOT FOR PERSONNEL

What type of team do you have?

## Strengths

- Team delivers courteous consistent quality care.
- Clinical team have rivalries. Some tensions.
- Everyone has degree, license, certificate = qualified for position.
- Manager is liked and respected.

## Weaknesses

- Front desk receptionist is weak at service delivery.
- Entire staff need enhanced computer skills.
- Review process is deemed sporadic.

## Opportunities

- Hire an outside H.R. company to beef up results.
- Cross training would provide better service, reduce stress.
- Plan for tech development correlate improvement to raises.

## Threats

- Reps will steal great staff.
- Laser tech not covering lease and salary.



# IMPLEMENT A PROVEN PROCESS FOR HIRING

1. Clear position description
2. Advertise/source candidate
3. Review resumes critically
4. Short phone screen
5. In-person interview process
6. Test/assess



# WHAT A POSITION DESCRIPTION SHOULD INCLUDE

- Job Title
- Job Objective
- List of Duties or Tasks Performed
- Description of the Relationships and Roles
- Job Specifications, Standard and Requirements
- Typical Physical Demands
- Typical Working Conditions



# WRITE GREAT POSITION DESCRIPTIONS

## The Position Description

The position description serves many functions during the hiring process and throughout your employee's tenure:

- It tells you exactly what capabilities and skills prospective staff members must have. The clearer your concept of what you are looking for, the more likely you are to find it.
- A detailed, realistic PD gives valuable guidance for interviewing candidates. It also allows you to clearly communicate the responsibilities, working conditions, reporting arrangements and compensation to candidates. This can help prevent an employee from leaving quickly because he or she didn't understand the job— a costly mistake for your practice.

# JOB DESCRIPTION: KNOW WHAT YOU ARE RECRUITING FOR

You know best what you do on a day to day basis. That's why we're asking you to describe your job to us! List all the jobs you do, in order of importance. Quantify your responsibilities in the columns indicated as Daily, Weekly, or Monthly. Details are important! Please provide us as much information as possible.

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Volume & Frequency				Job Element Descriptors
D	W	M	#	

# STAFF GAP ANALYSIS: WHAT ARE MY STAFFING NEEDS?

Often, when looking for a new employee, physicians look to promote their existing staff. The thinking goes something like *“Well, Julie has been here for five years, so she can manage the staff.”*

The problem is that Julie, the bookkeeper who has never supervised staff and has no training in supervision or made hire/fire decisions, is now responsible for seven employees and 2.5 million in revenues. It's a recipe for disaster.

Before appointing a staff member to a new position, consider analyzing to identify gaps (shortages) in staffing and skill levels.

*I've been here for four years and I love doing the books and insurance. Working alone at my pace in my own space is heavenly!*



## THREE MONTHS LATER

*I HATE my job!!!  
Listening to five complaining drama queens is not what I want to do.*





# WHAT WILL I BE DOING AS YOUR ...

1. Office Manager?
2. Practice Manager?
3. Administrator?

***“Take care of things ...”***



*Would any other  
business hire this  
person to manage  
a \$1M entity?*



# WHERE TO FIND APPLICANTS?



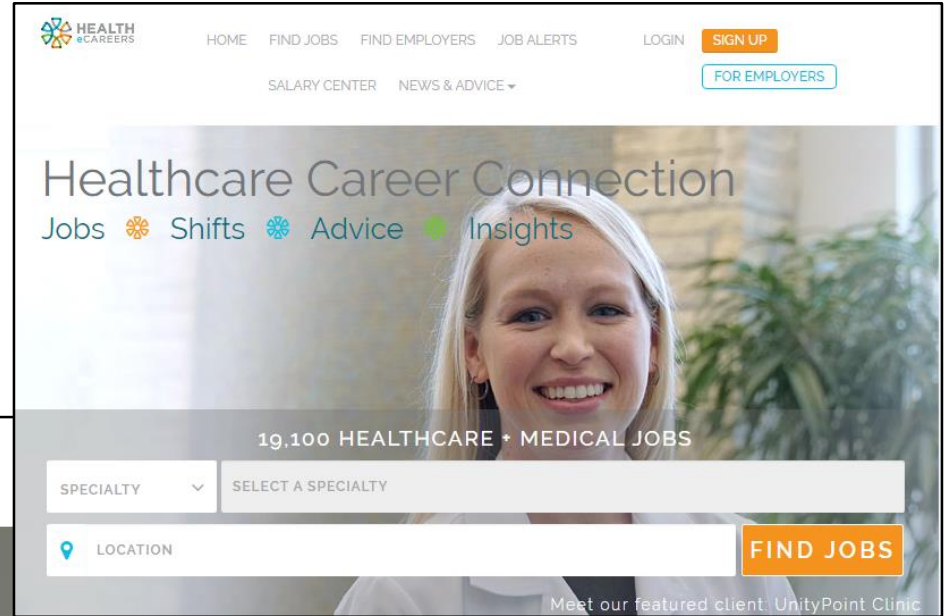
# JOB POSTING

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craigslist

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HEALTH CAREERS

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SALARY CENTER NEWS & ADVICE **FOR EMPLOYERS**

## Healthcare Career Connection

Jobs Shifts Advice Insights

19,100 HEALTHCARE + MEDICAL JOBS

SPECIALTY SELECT A SPECIALTY

LOCATION **FIND JOBS**

Meet our featured client: UnityPoint Clinic



MGMA  
Medical Group Management Association

## Career Development

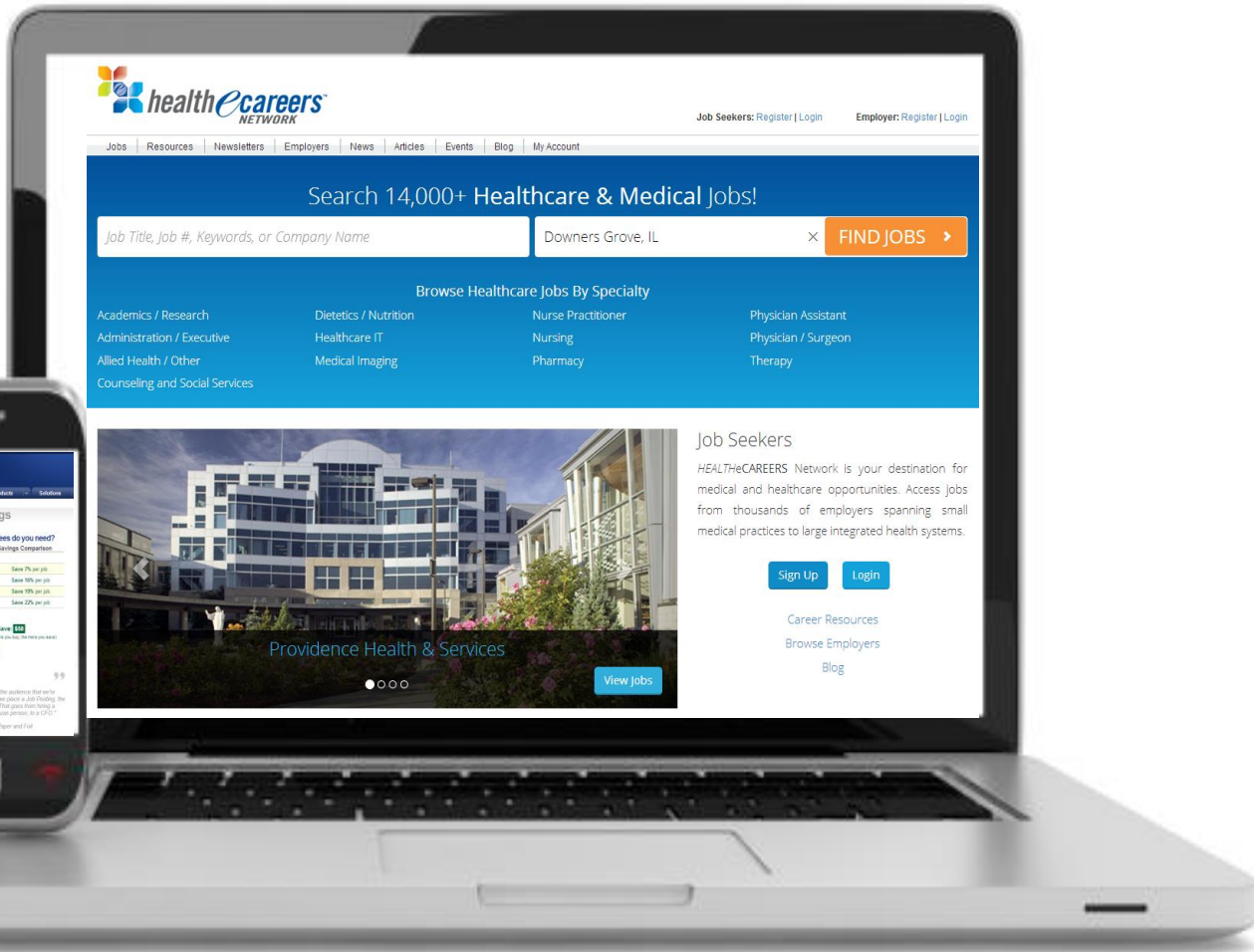
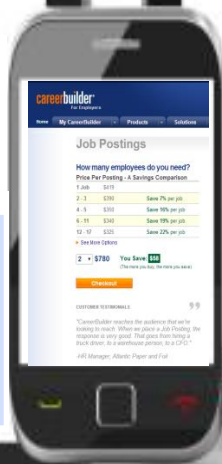
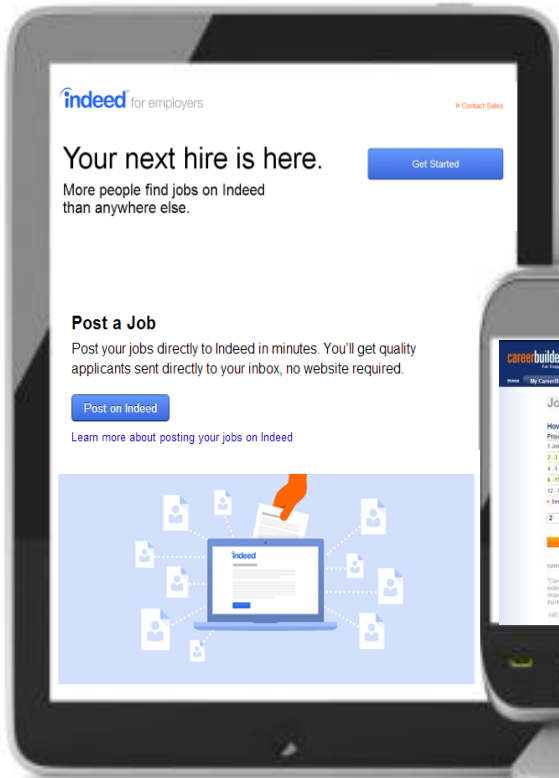
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<http://careers.mgma.com/jobs>





## Find a Job

Sort by

Relevance ▾

View

1-10 ▾



AAPC Direct

### Revenue Cycle Supervisor

Posted on 4/14/2017

UCSF Benioff Children's Physicians (UBCP) , Emeryville CA

POSITION SUMMARY: The Revenue Cycle Supervisor assists the Manager/Director in the ongoing development and performance of the revenue cycle team in the day to day operations. The position also works...

### CODER II

Posted on 4/14/2017

UNM Hospitals, Albuquerque NM

CODER II Job ID 2459636 Date posted 06/27/2016 Position Summary: Seeking candidates with a...

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# Do Not Post This Ad



## **Female Employees Wanted!**

You will work for minimum wage, have a college degree (*a B+ average*), red hair, and a tubal ligation.

# How to Write the Perfect Want Ad



<https://youtu.be/3tUln1drcTc>

**By: Simon Sinek**



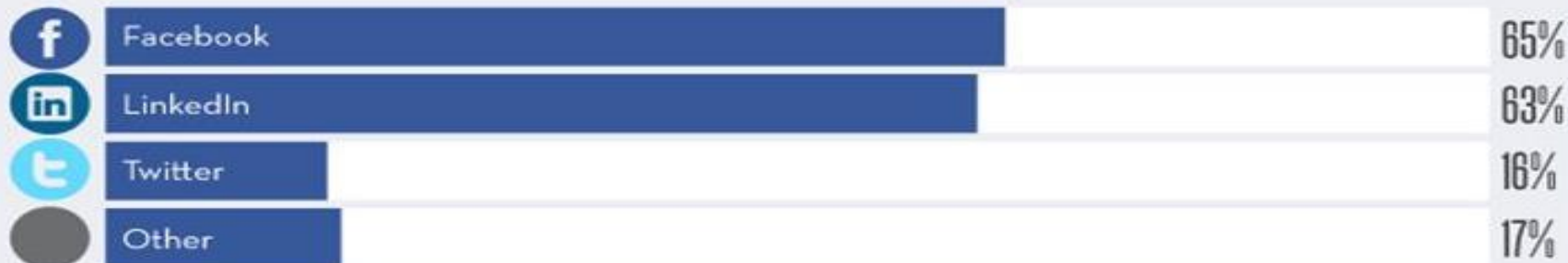
I ALWAYS FEEL LIKE SOMEBODY'S WATCHING ME...

37%



OF EMPLOYERS ARE USING SOCIAL NETWORKING SITES TO RESEARCH JOB CANDIDATES

Which sites are employers frequenting most?



The industry using social media for recruiting the most?

23 IT - 52%



Using it the least?  
HEALTH CARE - 28%



11% OF EMPLOYERS don't use social media to research candidates, but plan to start  
Source: careerbuilder.com



***"Sorry if I seem out of it. I've been going through some deeply personal and private problems. You can read all about it on Facebook."***

# SCREENING INTERVIEWS

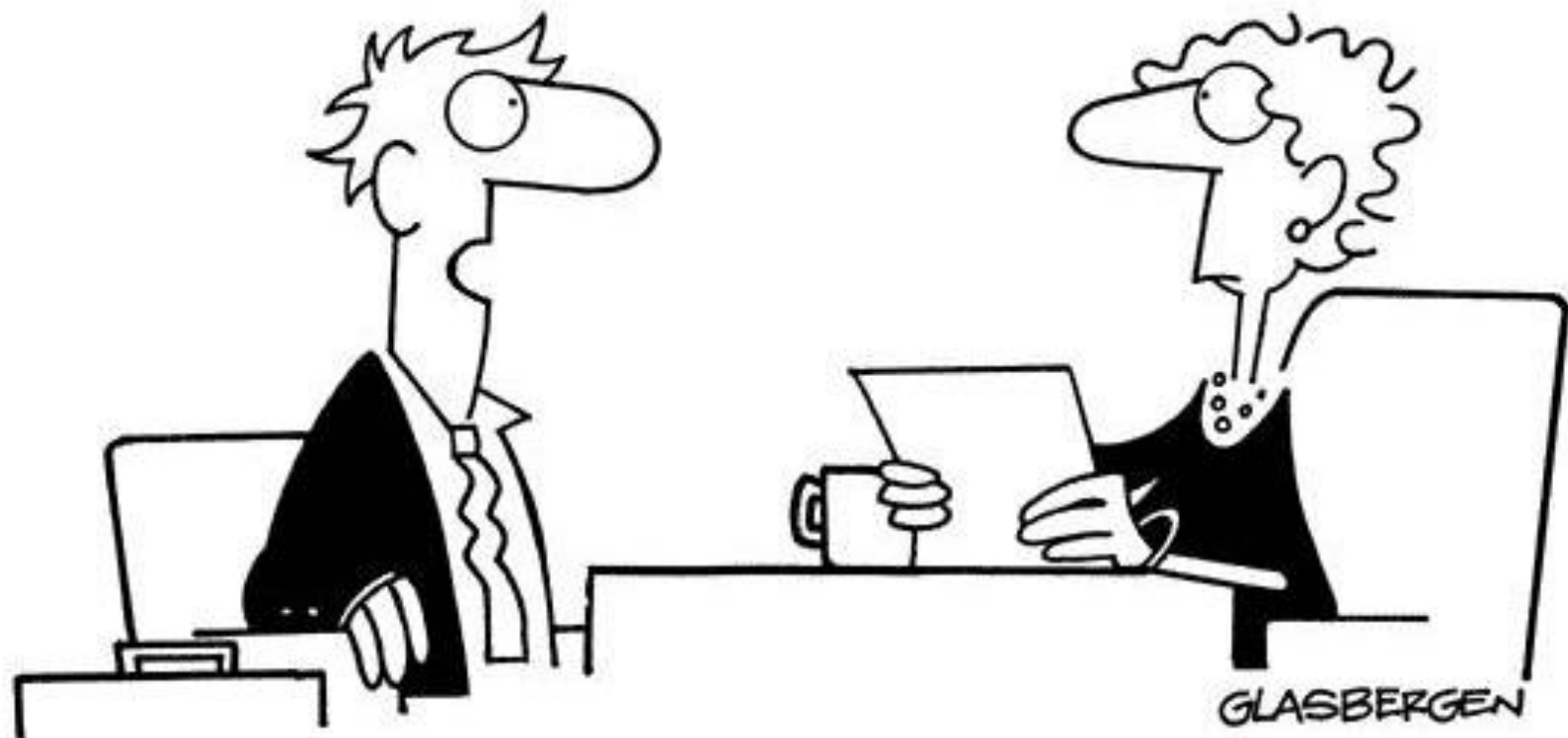
- Resumes
- Candidate Online Presence
- Screening Interviews

facebook

twitter

Instagram





**“What do you mean, it’s not a good résumé?  
It’s the most expensive one they had on eBay!”**

© 1998 Randy Glasbergen. [www.glasbergen.com](http://www.glasbergen.com)





## THE DISHONEST TRADITION OF FUDGING THE FACTS ON A **RÉSUMÉ**

Call it lying, misleading, inflating, embellishing or padding your résumé – turns out most of us do it in some form or another in pursuit of snagging that perfect job ... or any job in this economy.

### HOW MANY PEOPLE LIE ON THEIR RÉSUMÉ

IT DEPENDS ON  
THE WORDING AND  
WHO YOU ASK:

**40%**

people lying on  
résumés and job  
applications.

**50%**

people with at least  
a small amount of  
misleading content on  
their résumés

**53%**

résumés and job  
applications that  
contain falsifications

**78%**

résumés that are  
misleading

Source: [gradschoolhub.com](http://gradschoolhub.com)

# TOP 7 RÉSUMÉ LIES

Exaggerated job titles and responsibilities

Falsification of education credentials

Covering up criminal records

Inflated salaries

Falsified dates of employment

Falsification of professional license /credentials

Fake experience at 'ghost' companies

## WHICH SECTIONS OF A RÉSUMÉ DO PEOPLE LIE MOST ON?

**40%**

inflated salary claims

**33%**

inaccurate job descriptions

**29%**

altered employment dates

**27%**

falsified references

**21%**

fraudulent degrees

**7%**

job applicants who have a felony record

**3%**

job applicants who have a misdemeanor record

Source: [gradschoolhub.com](http://gradschoolhub.com)

# The New York Times

**BUSINESS DAY**

## Corner Office

Conversations with Adam Bryant about leadership and management.



EARL WILSON/THE NEW YORK TIMES

### Aron Ain of Kronos: The Incalculable Value of a Good Boss

Mr. Ain, chief executive of Kronos, a maker of work force

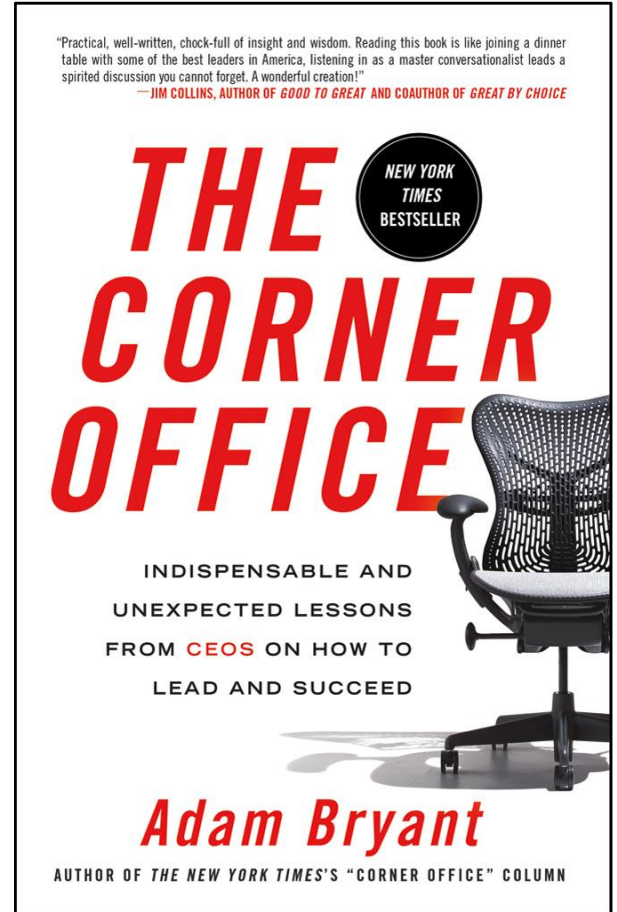
management software, says leadership is the greatest factor in success. <http://www.nytimes.com/column/corner-office>



EARL WILSON/THE NEW YORK TIMES

### Ben Chestnut of

MailChimp: Learn to



# WHEN INTERVIEWING CLINICAL OR BILLING MANAGERS



*“Give me the names of two peers who worked with you and two people you supervised. What would they say about you?”*





# Katie Couric with Sarah Palin

[https://commons.wikimedia.org/wiki/File:Katie\\_Couric\\_VF\\_2012\\_Shankbone\\_2.JPG](https://commons.wikimedia.org/wiki/File:Katie_Couric_VF_2012_Shankbone_2.JPG)  
[https://commons.wikimedia.org/wiki/File:Sarah\\_Palin\\_by\\_Gage\\_Skidmore\\_2.jpg](https://commons.wikimedia.org/wiki/File:Sarah_Palin_by_Gage_Skidmore_2.jpg)  
[https://commons.wikimedia.org/wiki/File:60Minutes\\_Logo\\_2005-2010.jpg](https://commons.wikimedia.org/wiki/File:60Minutes_Logo_2005-2010.jpg)

A silver laptop is shown from a front-facing perspective, slightly angled. The screen is black and displays white text. The laptop has a black keyboard and a silver trackpad. The background is white.

**Dear \_\_\_\_\_:**

**In advance of our meeting next  
Tuesday, please complete the  
following application and return  
to me.**

**Sincerely,  
Dr. Young**



# APPLICATION FORM

## APPLICANT'S CERTIFICATION AND AGREEMENT:

I hereby certify that the facts set forth in the above employment application are true, correct, and complete to the best of my knowledge and authorize the practice to verify their

I understand that, if employed, falsified statements of any kind or omission of facts called for on this application shall be considered sufficient basis for dismissal.

Signed: \_\_\_\_\_

This attestation is critically important according to attorneys specializing in labor law. Make sure you have all applicants sign.

***“Are they  
as good as  
they look?”***





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## Employment Screening

If you're looking for comprehensive employment screening services that help you make informed hiring decisions, then you need our solutions! Improve hiring processes and productivity while simultaneously mitigating exposure to litigation associated with improper background screening.



Out-of-State Criminal Search recommended for (with statutory fees when shown):

ND 2010

Order Now

Do not order

To order, select products to add and click Order Now. Please check back status under pending reports.

We alert you if applicant has lived anywhere else in the last 7 years.

**Prepared For: ABC Corporation**

<b>Account #:</b>	1001S	<b>Attn:</b>	APPLYNOW
<b>Phone:</b>	(763) 555-0874	<b>Reference:</b>	RECEPTIONIST/AP
<b>Email:</b>	TESTER@RHRIS.COM		
<b>Date Ordered:</b>	01/10/2014	<b>Completed:</b>	01/23/2014
<b>Entered By:</b>	APPLYNOW/1001SH	<b>Proofed By:</b>	JENNIFER
<b>Charges:</b>	\$75.95	<b>Report Type:</b>	COMPLETE
<b>File #:</b>	10B1C2	<b>Position Applied For:</b>	WAREHOUSE

**Applicant Name:** CONSUMER, JONATHAN  
**Address:** 447 SOCIS ST  
**City/State/Zip:** MARIETTA, GA 30064  
**SSN:** XXX-XX-3808  
**Phone(s):** 610-555-6515

**AKA Name(s):** JON, CONSUMER  
CONSUMER, JAKE  
CONSUMER, JAMES

Applicant has requested a copy of pre-employment consumer report.

Provide the applicant a copy of their report at no charge. Apply-Now Input link gives you access to the applicant release.

## Criminal Record

The Public Records and commercially available data sources used in this report should not be relied upon as definitively accurate. Data is sometimes entered poorly, processed incorrectly and is generally not free from defects. This report does not eliminate the possibility of additional information contained outside the scope of our search. **WARNING:** Criminal offenders frequently use aliases, including the names of other individuals. Do not assume search results correspond to the subject of your inquiry. Use **EXTREME CAUTION** in making employment decisions based upon this information. Fingerprint verification is the only way of confirming a subject's identity. Criminal SuperSearch requested.

**MN, FEDERAL (COMPREHENSIVE)**  
**LA, EAST BATON ROUGE (SINGLE COUNTY)**

**US, SUPERSEARCH (MULTI STATE)**  
**MN, STATE COURT (ALL 87 COUNTIES)**

1. Docket: 98CR7654321

**Name:** CONSUMER, JONATHAN  
**County:** HENNEPIN  
**Offense:** COUNT 1: NO INSURANCE - OWNER  
**Disposition:** DISMISSED  
**Statute Nbr:** 169.797.2  
**Category:** OTHER "VICTIMLESS" OFFENSES

**Name:** CONSUMER, JONATHAN  
**County:** HENNEPIN  
**Offense:** COUNT 2: NO VALID DRIVERS LICENSE FOR THE TYPE OR CLASS OF VEHICLE BEING DRIVEN  
**Disposition:** CONVICTED  
**Statute Nbr:** 171.02.1  
**Category:** OTHER "VICTIMLESS" OFFENSES

**DOB:** 11/23/1968  
**Date:** 08/08/2009  
**Docket:** 98CR7654321  
**Level:** MISD  
**DispDate:** 11/12/2009

## Criminal History

You choose whether Criminal records are obtained from county, statewide, or multi-state database searches.

*“We don’t need to check her background, she goes to my church.”*





# The New York Times

## *Bookkeeper at Doctor's Office Admits Embezzling \$2.3 Million for Lottery Habit*

By **BRUCE LAMBERT** and **VALERIE COTSALASA** AUG. 24, 2006

**RIVERHEAD, New York (AP) -- A former bookkeeper for a doctor's office pleaded guilty Wednesday to stealing more than \$2.3 million from her employer to buy lottery tickets.**

For months, Annie J. Donnelly drove her blue Dodge Durango every day to MK Cards and Gifts near her home on Long Island and bet thousands of dollars on New York State Lottery games, sometimes buying tickets by the hundreds.



**Annie Donnelly spent as much as \$6,000 a day on lottery tickets, prosecutors said.**

“Her favorites were Bonanza, Set for Life and Mega Money,” recalled the

<http://www.nytimes.com/2006/08/24/nyregion/24theft.html>



# Two Florida Medical Office Workers Face Fraud Charges

Two medical office workers in south Florida have been indicted on HIPAA violations and related charges for their alleged roles in an identity theft ring that used stolen patient information to access to their bank and credit card accounts, federal prosecutors said.

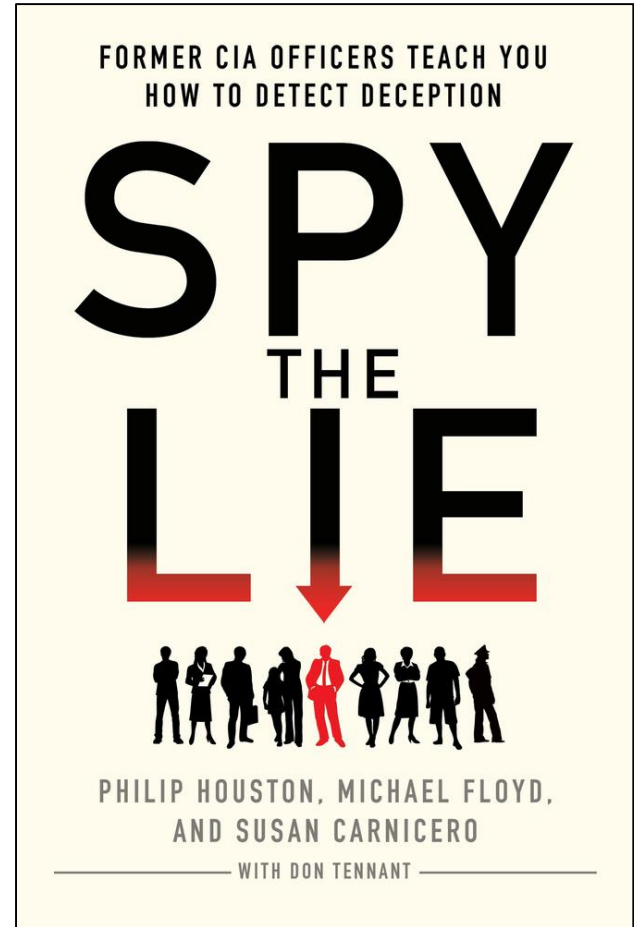
According to the indictment, defendants Erica Hall, 27, and Sharelle Finnie, 22, worked as office assistants at two separate medical offices in Coral Springs and Fort Lauderdale, respectively. The pair allegedly swiped patient information, including names, dates of birth, social security numbers, and other medical information, and sold it to co-conspirators. If convicted of the HIPAA violations, Hall and Finnie each face a maximum statutory term of 10 years in prison, federal prosecutors said.



# Spy the Lie:

## Former CIA Officers Teach You How to Detect Deception

Philip Houston, Michael  
Floyd, Susan Carnicero,  
Don Tennant (Writer)



# TRUTH IS STRANGER THAN FICTION

**Q.** “Why didn’t you list previous supervisors or employees?”

**A.** *“Everyone I’ve ever worked with is dead or has Alzheimer’s and is beyond the point of remembering.”*

# Do You Test Applicants?







**Computer Skills**  
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# DO YOU ASSESS APPLICANTS' SKILLS?



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## Microsoft Office Skills Tests

There are 3 versions of each test to choose from: **Basic, Standard and Advanced**

- Basic:** Consists of 30 to 35 test questions that cover beginner level questions only. Saving, Printing, Copying, Pasting, Bolding, etc.
- Standard & Intermediate (2013):** The standard and intermediate test is our most popular version. It consists of 30 to 35 questions that cover beginner, intermediate and advanced level questions all in one test. It's designed to show you their depth of knowledge within that application. The easy to read report will show you how well they did at each level.
- Advanced:** Consists of 30 to 35 test questions that cover advanced level questions only. This is a great test to use if you need an employee with high level skills. Macros, Formulas, Tables, etc.

[Access - Standard 2007, 2010 or Intermediate 2013](#)

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## QUESTIONS?

Frequently  
Asked  
Questions



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- No sign up fees, no pre-payment, no monthly fees

### PREPAY ACCOUNT

**As low as \$10 per test\***  
Buy blocks of tests and save.

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A pre-pay account allows you to buy in bulk to receive discounts.

\*Volume purchase required. Pre-paid test meters valid for one year.

### PURCHASE A SINGLE TEST

**\$20  
per test**

Pay and test one-at-a-time.

[Sign Up](#)

Don't want an account and just need one test? Purchase a single test here. Select the test, pay for it and test immediately!\* (Clients who need multiple tests or think they will test again in the future are encouraged to set up a Pay-As-You-Go Account) \$20 per test

# EXAMPLE OF TOTAL TEST RESULT

## Performance Analysis

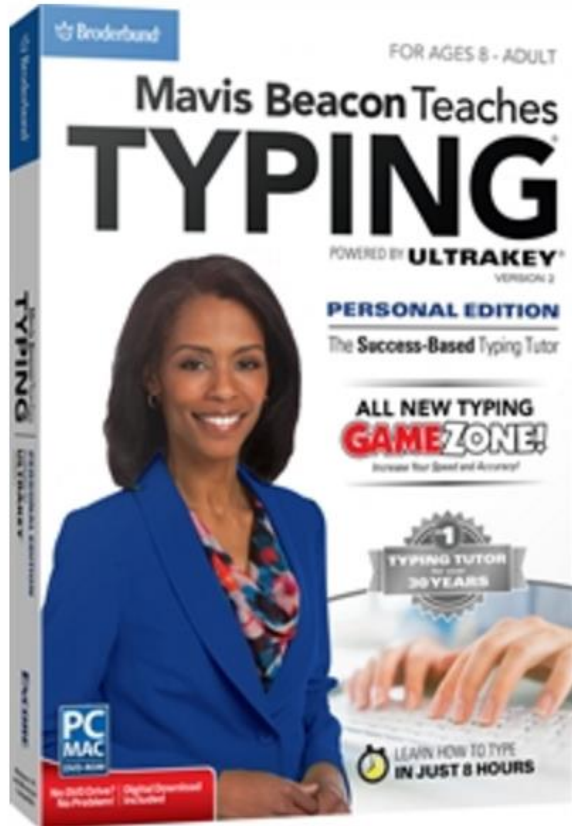
### LEVELS

	Score	Correct	Total
BEGINNER:	71%	10	14
INTERMEDIATE:	55%	6	11
ADVANCED:	30%	3	10

### TOPICS

	Score	Correct	Total
FILE MANAGEMENT:	17%	1	6
TOOLS AND AUTOMATION:	100%	2	2
EDITING:	71%	5	7
FORMATTING:	67%	8	12
TABLES AND GRAPHICS:	0%	0	3
PRINTING:	60%	3	5

# MAVIS BEACON TEACHES TYPING



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**for Healthcare \$25**

*PROCEPTION*<sup>2</sup> **\$95**  
*DISC*covering Your Style



**Background Check**  
**Skills Assessment**



**Call Mary Corder: 312-642-5616 ext. 150**

# SELECT FOR HEALTHCARE V3 RESULTS

Robin Example

3/20/2012

12:31:00 PM

## Positive Response Pattern - Use Scores Cautiously

This person responded to the inventories in a positive manner, therefore, the results are questionable. This may indicate the candidate:

1. has a very positive view of himself/herself, others, and life in general;
2. lacks self-insight or is unaware of personal limitations; or
3. was trying to look good and say the right things on the survey.

Some people who respond in this manner may have a tendency to be bluffers; they may create an initial impression that is more favorable than subsequent job performance. Others with this type of favorable response pattern may have a genuinely positive perspective regarding themselves, other people, and life in general. Special care should be taken to ensure that the candidate is as good as he/she appears to be. References should be checked carefully.

# SELECT FOR HEALTHCARE V3 RESULTS

Robin Example  
3/20/2012  
12:31:00 PM

## Random Response:

A check for random responding. If Invalid, the candidate could not or did not read the test well enough to avoid responding randomly, and these results should not be used.

## Integrity Index:

A measure of the candidate's attitudes about personal integrity and work ethic.

## Performance Index:

A measure of the traits associated with successful performance in this job.

Valid	Invalid
X	

Score 14	Avoid	Good
		X
	0-11	12-17

Score 25	Avoid	Okay	Good	Better
		X		
	0-24	25-29	30-36	37-41

# SELECT FOR HEALTHCARE V3 RESULTS

Robin Example  
3/20/2012  
12:31:00 PM

## Performance Sub-scale Analysis:

The table presents the candidate's scores for each sub-scale of the Performance Index.

Flagged areas should be probed in the interview.

Subscale	Okay	Flag*
<b>Energy</b> (activity level; action orientation)	X	
<b>Frustration Tolerance</b> (remain emotionally positive in spite of frustration)	X	
<b>Accommodation to Others</b> (willingness to accommodate the desires of others)	X	
<b>Acceptance of Diversity</b> (tolerance of others different from self)	X	
<b>Positive Service Attitude</b> (appreciation of the service role)	X	
<b>Multi-Tasking</b> (juggle many tasks)	X	
<b>Empathy</b> (concern for the feelings of others)		X
<b>Rapport</b> (put others at ease)	X	
<b>Accountability</b> (accept personal responsibility for performance)		X

\*If flagged, see interview probe suggestion(s) in later section.

# JOB TASK RESPONSES:

Robin Example 3/20/2012 12:31:00 PM

How willing are you to . . .	Would do it and enjoy it	Would do it	Would do it, but not like it	Would not want to do it	Would not do it
Work weekdays?				X	
Work evenings or nights?				X	
Work weekends?				X	
Work holidays?				X	
Work overtime?				X	
Commit to being on time, every time?				X	
Work on an on-call basis?				X	
Work cooperatively with others?				X	
Work directly with patients & families?	X				
Work with patients who have contagious diseases?				X	
Work with emotionally upset patients & families?	X				
Work with terminally ill patients?	X				
Follow strict procedures?	X				

The table above reports the candidate's stated willingness to do tasks commonly required in jobs similar to this one. Indications of reluctance should be probed during the interview.



# STEP 5: MAKE THE HIRING DECISION

**Robin Example**  
**3/20/2012**  
**12:31:00 PM**

Actions	Recommendation			Initials
Review Application	Not Acceptable	Some Reservations	Consider Further	
Prescreen (Optional)	Not Acceptable	Some Reservations	Consider Further	
Test Candidate & Review the Test Results	Not Acceptable	Some Reservations	Consider Further	
Behavioral Interview	Not Acceptable	Some Reservations	Acceptable	
Reference Checks (Optional)	Not Acceptable	Some Reservations	Acceptable	
Background Check (Optional)	Not Acceptable	Some Reservations	Acceptable	
Decide	Do Not Make Offer	Eligible At Later Date	Make Offer	
Drug/Medical Screen (Optional)	Fail		Pass	

# SELECT FOR HEALTHCARE COUNTERPRODUCTIVE BEHAVIORS

Robin Example  
3/20/2012  
12:31:00 PM

In this section, undesirable responses by the candidate to theft, job commitment, work ethic, resistance to direction, safety, etc. questions are presented. The total number of survey questions for each topic is given in parenthesis. The candidate selected an undesirable response to the following:

## JOB COMMITMENT (10 possible questions)

- How many employers have you had in the last three years? . . **Three**

## WORK ETHIC (6 possible questions)

- It would bother you very much if you knew another employee was losing the company money by wasting time. . . **Disagree**

# SELECT FOR HEALTHCARE V3 INTERVIEW

Robin Example  
3/20/2012  
12:31:00 PM

Preparation: Review the application form and test results

**STEP 1:** Open the Interview

**STEP 2:** Review the Application and Investigate Potential Problem Areas

**STEP 3:** Review Test Flags and Begin In-depth Questions

**STEP 4:** Conclude the Interview

**STEP 5:** Make the Hiring Decision

**STEP 6:** On-boarding and Development (Optional for New Hires Only)

## Robin Example

3/20/2012 12:31:00 PM

### Development Suggestions

**Congratulations on joining our team!** We want our team members to be as successful as possible right from the start, and the purpose of this report is to help you along that path. This information, along with the feedback you receive from your manager during your training, will help you to develop your skill set and increase your overall effectiveness in the role.

As part of the selection process you completed an assessment tool which measures characteristics that have been proven to have an impact on success in this type of role. Based on your responses we have identified one or more development areas for you. These are highlighted in the Development Suggestion section below. You will find that by working to develop your skill set in this area(s), you can learn to be more effective by managing your behavior at work therefore putting yourself in the best position to succeed in this role.

#### Low Empathy

Your assessment results suggest that you may have difficulty understanding others' situations and relating to what they are feeling. To become more empathic in your interactions with people, consider these suggestions:

- Recognize that everyone sees and reacts to situations differently — what may seem to be a minor inconvenience to one person might be a disaster to another. Therefore, it is important to set aside your own opinions and biases and try to view the situation from the other person's perspective.
- One key to empathy is to listen openly. Let the other person express their feelings without making any judgmental comments. Even if you are trying to be reassuring, statements such as "it's not that bad" or "....."

# PROCEPTION<sup>2</sup> DIScovering Your Style

## INDIVIDUAL REPORT

Sam Sample  
Acme, Inc  
03/13/15



REPORT PROVIDED BY  
**COMPANY**  
COMPANY

123 Sesame St.  
Bigbird, NY 12345  
www.company.com

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## PROCEPTION<sup>2</sup> DIScovering Your Style

### INTRODUCTION

Individuals have a recognizable and understandable behavioral style. Style can be described as the way people think, solve problems, express feelings and interact with others to get a job done. There is a simple key to understand how people behave. It is the "The DISC Model of Human Behavior." The intensity of each behavior we exhibit determines our personal behavioral traits. The intensity of each behavior we exhibit determines our personal behavioral traits. The intensity of each behavior we exhibit determines our personal behavioral traits.

Developed by William M. Marston, PhD, Marston's four dimension DISC model has been effective with millions of people worldwide. The terms most often associated with Marston's model are Influence, Steadiness and Compliance. These factors can range in intensity and work with the other behavioral factors. The relationship of these factors describes an individual's behavioral style. It describes an individual's DISC behavioral traits in a work environment.

The Proception2 questionnaire is intended to help individuals and management understand this individual's behavioral style. It can be used to develop strategies and methods to improve personal flexibility in working relationships with clients, managers, peers and staff. It is not a DISC behavior that is more desirable than another. This report will provide helpful personal strengths and areas in need of possible improvement.

**Note:** The higher the C the greater need to follow procedures. The lower the C the lower need to follow procedures.

**Traits of a High D:**  
Communication: Direct and to the Point  
Motivated By: Competition  
Priority: Goals  
Basic Weakness: Impatient  
Key Strength: Makes Quick Decisions

**Note:** The higher the S the greater need for task completion. The lower the S the lower need for task completion.

**Traits of a High I:**  
Communication: Fast, Emotional and Exciting  
Motivated By: Influencing Others  
Priority: People  
Basic Weakness: Not Listening Effectively  
Key Strength: Verbal Skills

Sam Sample **xx**

## PROCEPTION<sup>2</sup> DIScovering Your Style

most natural. It is the behavior we are comfortable using when working with and following rules and procedures. The purpose of this section of the report is to help you to function in a work environment using his/her natural style.

Sam Sample naturally gain insight into how he/she uses his/her Natural (Primary) style in a work environment.

Sam Sample to improve his opportunity for success, while tolerating differences of opinion. He may often agree with their position. He will prefer to take direction from others and directions. Sam places a high value on following established procedures and evaluates his options before attempting to solve a problem. He will prefer to approach a problem or project. Because Sam's approach is most times conservative he will not make decisions outside his basic scope of experience.

Sam Sample in business. Being people oriented, he will get to the purpose of the problem and exciting non-business interests. He will make every effort to promote his own ideas. He knows how to make life fun and exciting in spite of his spontaneous manner and will be ready for the exciting and fun things that come his way. He understands the need for their cooperation to obtain his views and will expect others to respond to his lead. Sam likes to approach problems without a plan. This can lead to acting first and trying to solve the problems that he created. His emotions will be easily swayed. A smile will indicate approval, a frown disapproval and emotion difficulty staying focused when working on tasks that are routine and exciting project. He will often attempt to use equipment without permission to work, he will find someone he knows and have them show him others. He generally feels that individuals who are not performing well are being held back.

Sam Sample expects team members to have similar skills. He will want to check for compliance when they are right. He can display "righteous" anger for may have already given up. Life is never dull when working with Sam. He is constantly on the lookout for the next exciting project or work cubicle for prolonged periods of time unless there are other projects whenever he feels the need.

Sam Sample can and may retaliate when others push too hard. Sam generally respects the wishes of respected individuals. He can tune out events being discussed in a situation at hand. He will approach problems and projects with a sense of timing and reasonableness in making his decision. This report highlights the potential behavioral traits and appropriate ways to help him/her, and the organization maximize his/her performance. The traits listed provide an overview of his/her style.

Sam Sample **xx**

## PROCEPTION<sup>2</sup> DIScovering Your Style

report highlights the potential behavioral traits and appropriate ways to help him/her, and the organization maximize his/her performance. The traits listed provide an overview of his/her style.

Sam Sample **xx**

## NOTABLE PRIMARY BEHAVIORS



We all have a style of behavior that is most natural. It is the behavior we are comfortable using when working with problems, people, pace and change, and following rules and procedures. The purpose for this section of the report is to provide an individual insight into how they prefer to function in a work environment using his/her natural style.

Read this section of the report carefully to gain insight into how he/she uses his/her Natural (Primary) style in a work environment.

### D- Dominance

#### - How Sam Solves Problems

Sam will tend to work closely with decision-makers to improve his opportunity for success, while tolerating differences of opinions. When others challenge his conclusions, he may often agree with their position. He will prefer to take direction from others rather than being the source of instructions and directions. Sam places a high value on following established rules, procedures and guidelines. Sam will want to evaluate his options before attempting to solve a problem. He will prefer to take calculated risks in his approach to the job, problem or project. Because Sam's approach is most times conservative and traditional in determining goals and objectives, he will not make decisions outside his basic scope of experience.

### I- Influence

#### - How Sam Influences Others

Sam will want to have time to talk about things other than business. Being people oriented, he will get to the purpose of the meeting, but will want to have time to talk about other exciting non-business interests. He will make every effort to promote discussion while persuading others to view the various options. He knows how to make life fun and exciting in spite of a difficult situation. He will respond to the situation in a spontaneous manner and will be ready for the exciting and fun things that oppose his way. He will attempt to ward off his opposition by promoting discussion and persuading others to look at the



## MY ACTION PLAN - SAMPLE



Your next step is to review your report and work with your manager/supervisor, when possible, to identify areas for your personal development. Select from the list below or prepare your own developmental goal(s).

This step is all about getting creative, broadening your thinking and coming up with an action plan for personal development you may not have considered before. The next step is all about focusing, narrowing down your options, and setting clear deadlines for the actions you plan to take.

Communicating

Delegating

Decision Making

Time Management

Developing People

Evaluating Performance

Personal Development

Career Goals

Motivating Others

Personal Goals

Planning

Improve Personal Relationships

Other: \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

Name

Sam Sample

Date

5/1/15

# DO YOU WANT TO HIRE THE BEST?

- Hire productive, dependable, trustworthy and service-minded people.
- Your interview intuition needs a litmus test.
- Reference checks.
- Pre-employment tests.



**SMART** goals  
are **KPIs**

# HERE'S A SURGERY COORDINATOR TRAINING SCHEDULE

Training Task	Target Date for Completion	Date Completed
<p><b>1. Read assigned materials in print and on the web.</b> Set aside time to discuss the procedure you perform most often. Ask questions to assess the coordinator's understanding of the material. Be sure to point out any differences in the way you do things compared to what she's read.</p>		
<p><b>2. Review your curriculum vitae (CV).</b> The patient coordinator should understand the scope of your training. She should know what "double boarded" and FACS mean. Give her time to ask questions about your personal interests and strengths.</p>		
<p><b>3. Role-play consult process. Practice handling fee objections.</b></p>		

# Here's a Surgery Coordinator Training Schedule

Training Task	Target Date for Completion	Date Completed
<p><b>1. Read assigned materials in print and on the web.</b> Set aside time to discuss the procedure you perform most often. Ask questions to assess the coordinator's understanding of the material. Be sure to point out any differences in the way you do things compared to what she's read.</p>		
<p><b>2. Review your curriculum vitae (CV).</b> The patient coordinator should understand the scope of your training. She should know what "double boarded" and FACS mean. Give her time to ask questions about your personal interests and strengths.</p>		
<p><b>3. Role-play consult process.</b> Practice handling fee objections.</p>		
<p><b>4. Shadow consultations.</b> It's important that your coordinator thoroughly understands the consultation process so she can explain it to potential patients. It is also a good idea to introduce your patient coordinator to your pre- and post-</p>		

# GOAL:

Happily

Hired

Ever After







**Thank you and  
Good Luck!**

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**THANK** YOU

**Karen Zupko**

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