Staff Selection and Training Tools in the New Tech Era

Presented by: Karen Zupko
President

BONES
California BONES Society

KARENZUPKO & ASSOCIATES, INC.
Karen Zupko and her team provides office consultation for practices.

Karen Zupko & Associates, Inc. makes hiring assessment tools available and background checks.
KZA CELEBRATING

31 Years of Service!

26 FT Staff and Consultants

8 Employees with 18+ Years of Service
Hire Smarter!
Staff are either the largest overhead cost or the best investment in your success!
**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
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: _________________________________________________________

<table>
<thead>
<tr>
<th>Volume &amp; Frequency</th>
<th>Job Element Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>W</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
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<td></td>
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</tr>
</tbody>
</table>
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

LinkedIn

careerbuilder

craigslist

Indeed

https://commons.wikimedia.org/wiki/File:LinkedIn_Logo_2013.svg
https://commons.wikimedia.org/wiki/File:Craigslist.svg
https://commons.wikimedia.org/wiki/File:CareerBuilder_Logo.svg
https://healthecareers.com/
http://careers.mgma.com/jobs
Revenue Cycle Supervisor

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

UNM Hospitals, Albuquerque NM

CODER II Job ID 2459636Date posted 06/27/2016Position Summary: Seeking candidates with a...
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/3tU1n1drcTc

By: Simon Sinek
37% of employers are using social networking sites to research job candidates.

Which sites are employers frequenting most?

<table>
<thead>
<tr>
<th>Social Media Site</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>65%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>63%</td>
</tr>
<tr>
<td>Twitter</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>17%</td>
</tr>
</tbody>
</table>

The industry using social media for recruiting the most?
- IT - 52%
- Health Care - 28%

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

Image Source: https://commons.wikimedia.org/wiki/Cyndi_Lauper#/media/File:Cindy_Lauper.jpg
“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
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
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?

- Inflated salary claims: 40%
- Inaccurate job descriptions: 33%
- Altered employment dates: 29%
- Falsified references: 27%
- Fraudulent degrees: 21%
- Job applicants who have a felony record: 7%
- Job applicants who have a misdemeanor record: 3%

Source: gradschoolhub.com
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 value a company can add to itself and affects shareholders value.
“Give me the names of two peers who worked with you and two people you supervised. What would they say about you?”
Dear _____:
In advance of our meeting next Tuesday, please complete the following application and return to me.
Sincerely,
Dr. Young
APPLICANT’S CERTIFICATION AND AGREEMENT:

I hereby certify that the facts set forth in the above employment application are true and complete to the best of my knowledge and authorize the practice to verify their accuracy and to obtain reference information on my work performance. I hereby release the practice from any/all liability of whatever kind and nature which, at any time, could result from obtaining and having an employment decision based on such information.

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: ___________________________________
“Are they as good as they look?”
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.
We alert you if applicant has lived anywhere else in the last 7 years.

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

---

**Prepared For: ABC Corporation**

<table>
<thead>
<tr>
<th>Account #:</th>
<th>1001S</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone:</td>
<td>(763) 555-0874</td>
</tr>
<tr>
<td>Email:</td>
<td><a href="mailto:TESTER@RHRIS.COM">TESTER@RHRIS.COM</a></td>
</tr>
<tr>
<td>Date Ordered:</td>
<td>01/10/2014</td>
</tr>
<tr>
<td>Entered By:</td>
<td>APPLYNOW/1001SH</td>
</tr>
<tr>
<td>Charges:</td>
<td>$75.95</td>
</tr>
<tr>
<td>File #:</td>
<td>1661C2</td>
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</table>

**Attn:** APPLYNOW

**Reference:** RECEPTIONIST/AP

**Completed:** 01/23/2014

**Proofed By:** JENNIFER

**Report Type:** COMPLETE

**Position Applied For:** WAREHOUSE

**Applicant Name:** CONSUMER, JONATHAN

**Address:** 447 SOCIS ST

**City/State/Zip:** MARIETTA, GA 30064

**SSN:** XXX-XX-3608

**Phone(s):** 610-555-6515

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

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

Apply-Now Input - Click here to view complete apply-now input.
**Criminal History**

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

<table>
<thead>
<tr>
<th>MN, FEDERAL (COMPREHENSIVE)</th>
<th>US, SUPERSEARCH (MULTI STATE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LA, EAST BATON ROUGE (SINGLE COUNTY)</td>
<td>MN, STATE COURT (ALL 87 COUNTIES)</td>
</tr>
</tbody>
</table>

1. Docket: 98CR7654321

<table>
<thead>
<tr>
<th>Name:</th>
<th>CONSUMER, JONATHAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>County:</td>
<td>HENNEPIN</td>
</tr>
<tr>
<td>Offense:</td>
<td>COUNT 1: NO INSURANCE - OWNER</td>
</tr>
<tr>
<td>Disposition:</td>
<td>DISMISSED</td>
</tr>
<tr>
<td>Statute Nbr:</td>
<td>169.797.2</td>
</tr>
<tr>
<td>Category:</td>
<td>OTHER &quot;VICTIMLESS&quot; OFFENSES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name:</th>
<th>CONSUMER, JONATHAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>County:</td>
<td>HENNEPIN</td>
</tr>
<tr>
<td>Offense:</td>
<td>COUNT 2: NO VALID DRIVERS LICENSE FOR THE TYPE OR CLASS OF VEHICLE BEING DRIVEN</td>
</tr>
<tr>
<td>Disposition:</td>
<td>CONVICTED</td>
</tr>
<tr>
<td>Statute Nbr:</td>
<td>171.02.1</td>
</tr>
<tr>
<td>Category:</td>
<td>OTHER &quot;VICTIMLESS&quot; OFFENSES</td>
</tr>
</tbody>
</table>

DOB: 11/23/1968
Date: 08/08/2009
Docket: 98CR7654321
Level: MISD
DispDate: 11/12/2009
“We don’t need to check her background, she goes to my church.”
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.

"Her favorites were Bonanza, Set for Life and Mega Money," recalled the...
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.

Source: John Commins, for HealthLeaders Media, April 11, 2011
Spy the Lie: Former CIA Officers Teach You How to Detect Deception

Philip Houston, Michael Floyd, Susan Carnicero, Don Tennant (Writer)
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
Speed and Accuracy
Coding and Billing
Customer Service
Reports
DO YOU ASSESS APPLICANTS’ SKILLS?

Reliable Skills Assessments

- over 800 ready to use tests
- interactive and validated tests
- affordable for all needs, large or small

www.totaltesting.com
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

www.totaltesting.com
Web-Based (Online)

<table>
<thead>
<tr>
<th>PAY-AS-YOU-GO ACCOUNT</th>
<th>PREPAY ACCOUNT</th>
<th>PURCHASE A SINGLE TEST</th>
</tr>
</thead>
<tbody>
<tr>
<td>$20 per test</td>
<td>As low as $10 per test*</td>
<td>$20 per test</td>
</tr>
<tr>
<td>Pay for only the tests you use!</td>
<td>Buy blocks of tests and save.</td>
<td>Pay and test one-at-a-time.</td>
</tr>
<tr>
<td>No sign-up fees</td>
<td>A pre-pay account allows you to buy in bulk to receive discounts.</td>
<td>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</td>
</tr>
</tbody>
</table>

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

www.totaltesting.com
# Performance Analysis

## Levels

<table>
<thead>
<tr>
<th>Level</th>
<th>Score</th>
<th>Correct</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginner:</td>
<td>71%</td>
<td>10</td>
<td>14</td>
</tr>
<tr>
<td>Intermediate:</td>
<td>55%</td>
<td>6</td>
<td>11</td>
</tr>
<tr>
<td>Advanced:</td>
<td>30%</td>
<td>3</td>
<td>10</td>
</tr>
</tbody>
</table>

## Topics

<table>
<thead>
<tr>
<th>Topic</th>
<th>Score</th>
<th>Correct</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Management</td>
<td>17%</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>Tools and Automation:</td>
<td>100%</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Editing:</td>
<td>71%</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>Formatting:</td>
<td>67%</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Tables and Graphics:</td>
<td>0%</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Printing:</td>
<td>60%</td>
<td>3</td>
<td>5</td>
</tr>
</tbody>
</table>
MAVIS BEACON TEACHES TYPING

Mavis Beacon Teaches Typing Powered by UltraKey v2 - Personal Edition
Master Typing with Mavis Beacon!

- Download - Windows - $19.99
- Download - Macintosh - $19.99

Hiring Tools to Help You

for Healthcare $25

Background Check $95

Skills Assessment

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

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

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.
<table>
<thead>
<tr>
<th>Actions</th>
<th>Recommendation</th>
<th>Initials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Application</td>
<td>Not Acceptable</td>
<td>Some Reservations</td>
</tr>
<tr>
<td>Prescreen (Optional)</td>
<td>Not Acceptable</td>
<td>Some Reservations</td>
</tr>
<tr>
<td>Test Candidate &amp; Review the Test Results</td>
<td>Not Acceptable</td>
<td>Some Reservations</td>
</tr>
<tr>
<td>Behavioral Interview</td>
<td>Not Acceptable</td>
<td>Some Reservations</td>
</tr>
<tr>
<td>Reference Checks (Optional)</td>
<td>Not Acceptable</td>
<td>Some Reservations</td>
</tr>
<tr>
<td>Background Check (Optional)</td>
<td>Not Acceptable</td>
<td>Some Reservations</td>
</tr>
<tr>
<td>Decide</td>
<td>Do Not Make Offer</td>
<td>Eligible At Later Date</td>
</tr>
<tr>
<td>Drug/Medical Screen (Optional)</td>
<td>Fail</td>
<td>Pass</td>
</tr>
</tbody>
</table>
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

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)
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 therefor 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 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 “you’ll get over it” can be perceived as minimizing their feelings.


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 come his way. He will attempt to ward off his opposition by promoting discussion and persuading others to look at the picture in another way.
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
<table>
<thead>
<tr>
<th>Training Task</th>
<th>Target Date for Completion</th>
<th>Date Completed</th>
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<td><strong>1. Read assigned materials in print and on the web.</strong></td>
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<td>Set aside time to discuss the procedure you perform most often. Ask questions</td>
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<td>to assess the coordinator’s understanding of the material. Be sure to point</td>
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<td>questions about your personal interests and strengths.</td>
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<td><strong>3. Role-play consult process. Practice handling fee objections.</strong></td>
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Here’s a Surgery Coordinator Training Schedule

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<td>4. Shadow consultations.</td>
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<td>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-surgery procedures.</td>
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<td></td>
</tr>
</tbody>
</table>
GOAL: Happily Hired Ever After
Thank you and Good Luck!

www.karenzupko.com
THANK YOU

Karen Zupko
President

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