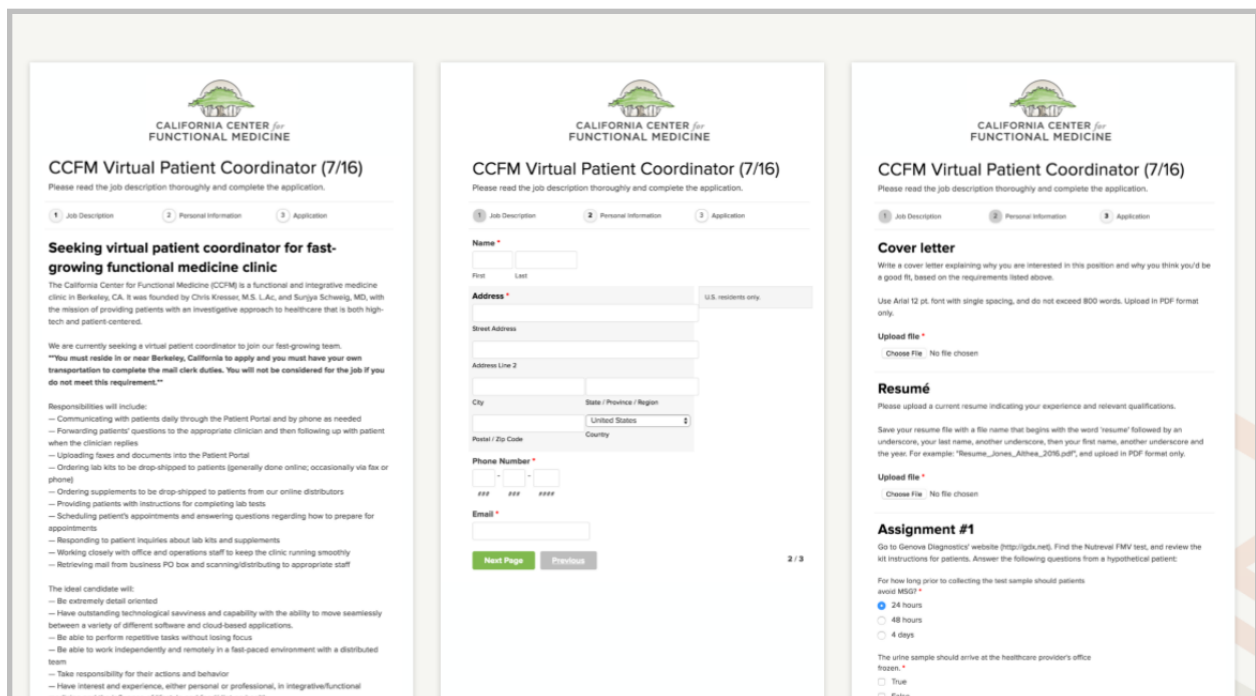


## Getting Help - Part Two

Once you decide where you'll source the staff, the next step is to post a job ad. I'll provide you with the detailed job descriptions we've used for our staff admin positions. I'll also provide you the job descriptions we've used to hire clinicians for when you get to that point. You can use these as templates for your own job descriptions, and I encourage you to be as thorough and detailed as possible.

Once you post an ad it's very important to include a screening process for applicants. We do this in two ways: we provide specific instructions that candidates must follow when submitting their applications, and secondly, we ask them to do an audition. Here is how that works:



**CALIFORNIA CENTER for FUNCTIONAL MEDICINE**

**CCFM Virtual Patient Coordinator (7/16)**  
Please read the job description thoroughly and complete the application.

1 Job Description 2 Personal Information 3 Application

**Seeking virtual patient coordinator for fast-growing functional medicine clinic**

The California Center for Functional Medicine (CCFM) is a functional and integrative medicine clinic in Berkeley, CA. It was founded by Chris Kresser, M.D., and Surge Schwab, M.D., with the mission of providing patients with an investigative approach to healthcare that is both high-tech and patient-centered.

We are currently seeking a virtual patient coordinator to join our fast-growing team.  
\*\*You must reside in or near Berkeley, California to apply and you must have your own transportation to complete the mail clerk duties. You will not be considered for the job if you do not meet this requirement.\*\*

**Responsibilities will include:**

- Communicating with patients daily through the Patient Portal and by phone as needed
- Forwarding patients' questions to the appropriate clinician and then following up with patient when the clinician replies
- Uploading tests and documents into the Patient Portal
- Ordering lab kits to be drop-shipped to patients (generally done online; occasionally via fax or phone)
- Ordering supplements to be drop-shipped to patients from our online distributors
- Providing patients with instructions for completing lab tests
- Scheduling patients' appointments and answering questions regarding how to prepare for appointments
- Responding to patient inquiries about lab kits and supplements
- Working closely with office and operations staff to keep the clinic running smoothly
- Receiving mail from business PO box and sorting/distributing to appropriate staff

**The ideal candidate will:**

- Be extremely detail oriented
- Have outstanding technological savviness and capability with the ability to move seamlessly between a variety of different software and cloud-based applications.
- Be able to perform repetitive tasks without losing focus
- Be able to work independently and remotely in a fast-paced environment with a distributed team
- Take responsibility for their actions and behavior
- Have interest and experience, either personal or professional, in integrative/functional medicine and the influence of lifestyle and food/diet on health.

**Personal Information**

**Name \***  
First Last

**Address \*** U.S. residents only  
Street Address  
Address Line 2  
City State / Province / Region  
Postal / Zip Code Country

**Phone Number \***  
### ### ####

**Email \***

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**CALIFORNIA CENTER for FUNCTIONAL MEDICINE**

**CCFM Virtual Patient Coordinator (7/16)**  
Please read the job description thoroughly and complete the application.

1 Job Description 2 Personal Information 3 Application

**Cover letter**

Write a cover letter explaining why you are interested in this position and why you think you'd be a good fit, based on the requirements listed above.

Use Arial 12 pt. font with single spacing, and do not exceed 800 words. Upload in PDF format only.

**Upload file \***  
Choose File No file chosen

**Resume**

Please upload a current resume indicating your experience and relevant qualifications.

Save your resume file with a file name that begins with the word 'resume' followed by an underscore, your last name, another underscore, then your first name, another underscore and the year. For example: 'resume\_jones\_atkins\_2016.pdf', and upload in PDF format only.

**Upload file \***  
Choose File No file chosen

**Assignment #1**

Go to Genova Diagnostics' website (<http://gdx.net>). Find the Nutrieval FMV test, and review the kit instructions for patients. Answer the following questions from a hypothetical patient:

For how long prior to collecting the test sample should patients avoid MSG? \*

☒ 24 hours  
☐ 48 hours  
☐ 4 days

The urine sample should arrive at the healthcare provider's office frozen. \*

☐ True  
☐ False

From the ad, you link to a Wufoo form, or any form—SurveyMonkey—there are a lot of different software applications that provide forms, or even Google Forms, which is free. Page one, at the left on this slide that you're looking at, is the job description, and then page two collects their basic information such as name, address, phone number, and email, and page three is the application and audition. In part one of the application, we ask for a cover letter. The instructions say to write a cover letter explaining why you're interested in this position and why you think you'd be a good fit. Then we have specific instructions that say "use Arial 12-point font with single spacing and do not exceed 800 words, upload in PDF format only." In part two, we ask for the resume, and we ask them to save the file with a specific naming convention: the word *resume* followed by underscore, your last name, another underscore, then your first name, another underscore, and the year. We provide an example of what that looks like.

You might be shocked, but I would say that over 85 percent of applicants do not follow these instructions, and we would eliminate them right off the bat because, if someone cannot pay attention and follow instructions during an application for a new job, then it's very likely that they're going to do that on the job itself. In the past, when I first started using this process, we've gone against our better judgement in a few cases and hired someone who didn't follow these instructions because they had a great resume or cover letter—we were impressed with them in some way—and in every case, we wished we didn't do that, and we had to let the person go pretty quickly. Your mileage may vary, but this has been a really important and helpful part of the process for us in narrowing down the potential pool of candidates.

The third part of the application process is the audition. We typically give two to three tasks for prospective employees to perform that are representative of what they would be doing in the position and require the skills and qualities that we're looking for. We've found that this is a much better predictor of future performance than a resume or a cover letter, or even an interview. The tasks that you ask people to perform will vary depending on the position, but these two are what we have used recently for hiring patient coordinators:

## Assignment #1

Go to Genova Diagnostics' website (<http://gdx.net>). Find the Nutreval FMV test, and review the kit instructions for patients. Answer the following questions from a hypothetical patient:

For how long prior to collecting the test sample should patients avoid MSG? \*

- ☒ 24 hours
- ☐ 48 hours
- ☐ 4 days

The urine sample should arrive at the healthcare provider's office frozen. \*

- ☐ True
- ☐ False

The patient informs you that they are taking an antihistamine. What would you do? \*

- ☐ Instruct the patient to go ahead and take the test
- ☐ Instruct the patient to stop taking the antihistamine 4 days before collecting the sample
- ☐ Ask the prescribing physician for guidance on what the patient should do

## Assignment #2

What is the vendor item code for the supplement called Thorne Methyl-Guard Plus at EmersonEcologics.com?

Answer \*

We will be in touch with selected applicants for the first round of interviews soon. If you do not hear from us, that means we have chosen not to pursue your application at this time.

Thank you for your interest in working at CCFM!

Submit

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Assignment number one is go to Genova Diagnostics website, find the NutrEval FMV test, and review the kit instructions for patients. Answer the following questions from a hypothetical patient: "how long prior to collecting the sample should patients avoid MSG?", and we give them a few options. "The urine sample should arrive at the healthcare provider's office frozen, true or false?" "The patient informs you that they are taking an antihistamine, what would you do?", we give them a few options here. We're looking for an ability to be able to go and find, first of all, the NutrEval FMV test at Genova, to find the kit instructions for patients, to review them, understand them, and then be able to answer questions from a patient based on those instructions. So, pretty relevant to

what they would be doing in their position. We're not making this super difficult, but again, you might be surprised how many people don't answer these questions correctly.

Assignment number two is: what is the vendor item code for the supplement called: "Thorne Methyl-Guard Plus" at EmersonEcologics.com? Again, pretty straightforward. They just go to Emerson, search for that supplement, and find the vendor item code. We're not really trying to trick people or trip them up here. We're just making sure that people can follow simple directions.

There are a couple ways you can do the audition. You can do it as we have typically done it, as part of the application process, or you can wait and do it after you've already screened applicants, and you've done the initial interview. The former strategy makes sense if you have a large number of applicants for the position and a lot of people who are excited about the position and want to work for you because they will be willing to jump through a few more hoops, and you'll need additional criteria for screening and narrowing down the candidates. So, because of the size of my email list and online platform, we typically get a lot of applications for each position. We need ways of narrowing down those applicants.

However, if you are just starting out, and you don't have a lot of applications coming in, and you don't have name recognition and people who are really excited and interested in working for you, then it may be a better idea to wait and ask people to do the audition after you've done the initial interview. They've met you, and they are serious about the job because when a lot of people are applying for jobs, they're applying to many, many jobs at once. Whether or not that is a good idea, that is how it often happens, so they may just see something like this and move on to the next position. You might think that would disqualify them, but there are probably some qualified applicants. They haven't met you yet. They're not sure whether they want to invest that time and energy, especially since they are not getting paid. In that situation, it might be better to have the in-person or Zoom video interview first with the applicant, and then at the end of that interview, you can say "we'd like you to complete this audition." We've found that it is a better indicator of future performance than anything else, including a cover letter, a resume, or even an interview. We've never had someone say no to that.

Another possibility is using a more detailed audition that is harder and more complex, which gives you an even better indicator of their performance. In most cases when we've done that we've paid people for those auditions because I don't think it is a good idea to ask people to do too much free work. That generally doesn't sit well. You want to show them that you're serious about them, and you value their work. That would obviously increase the cost of hiring someone, but in that situation, you would only do the audition after you've narrowed it down to two or three candidates. Even if you have to pay each of them to do the audition and you end up spending \$100 or \$200, it will be well worth it. We've found, again—as I've said now a few times—that it is by far the best indicator of future performance.

## Audition

Please complete the following requests below. We have found that asking potential employees to complete a few representative tasks is a far better indicator of how they are likely to perform in their position than a cover letter or resumé.

1. **Scenario:** Chris uses iCloud calendar. He would like to be notified (via Notification Center in OS X, not email) when you schedule an event for him so he can approve or decline, and/or add a reminder to the event. He uses Fantastical 2 as his calendar app. Please determine whether this functionality is offered by that application.
2. **Scenario:** Chris would like to do a 2-day personal retreat to focus on developing content for a new program he is working on. Criteria for this retreat: within 75-min drive of Berkeley, in beautiful/natural area, relatively close to natural/health food store and/or farm-to-table restaurants, close to hiking trails and/or beach, comfortable work desk, price range up to \$300/night. Propose three accommodations/locations that meet these criteria.
3. **Scenario:** Chris has received repeated email and voice messages inviting him to be a guest on a particular podcast. The podcast is new, has a small audience, is not a good fit in terms of content, and Chris is presently focused on creating content for a new clinician training program. Please draft an email response to the podcaster declining the invitation.

On that note, here is an audition that I use for hiring an executive assistant. You can see that the questions are much more difficult, and they reflect the complexity of that position. For example, question number one says, “Chris uses iCloud calendar. He’d like to be notified via notification center in OS X, not email, when you schedule an event for him so he can approve or decline and/or add a reminder to the event. He uses Fantastical 2 as his calendar app. Please determine whether this functionality is offered by that application.” This is getting at a number of different core skills. First of all, they have to be tech savvy. Second of all, they have to know how to do some research and figure out a question like this that is based on a technology platform. In most cases, I want them—unless they do know the answer—to take the initiative and contact Fantastical 2 support. There are a number of different core competencies that we’re getting at with that type of question. Question number 3—I’ll just skip over 2, you can read it if you like—“Chris has received repeated

email and voice messages inviting him to be a guest on a particular podcast. The podcast is new. It has a small audience. It's not a good fit in terms of content, and Chris is presently focused on creating content for a new clinician training program." This was a real audition earlier in the year when I was building ADAPT. "Please draft an email response to the podcast declining the invitation." Here, I'm looking at their writing skills. I'm looking at their familiarity with my work. I'm looking at how diplomatic they can be in drafting that email declining the invitation.

Certainly, these questions are much more detailed and time consuming. As I mentioned on the last slide, if we asked someone to do this, we would make it be a paid audition, and we wouldn't have it be part of the application process. We would do it after we've already narrowed down to two or three candidates who we are seriously considering.