Getting Help - Part Four

After we've done the Winslow, evaluated the candidates, and we've done the auditions, we invite them for a final interview. If they are local, this will be in person, even if the job is a virtual position. If they live further away, out of state, or out of the area, we will do a video Zoom interview again.

In this interview, we will dive deeper into their resume, their relevant experience, and the potential issues that might have come up on the Winslow or Kolbe. If you work with a Winslow consultant, he or she can help you structure the follow-up interview to get more info on whether there are areas of concern, if they had any, that would be an issue if you hired that candidate.

It is important to point out that Winslow just points to natural proclivities. People can and do learn ways of mitigating their natural tendencies. For example, if someone is low in structure or order but needed it for a job, they might learn to create systems that support them in that. However, it is important to understand that, even in those situations, structure and order would never come naturally and, given enough time, people tend to revert to what is natural for them.

After the final interview, we would check references. To be honest, I'm not sure how important this step is. Checking references has never changed our decision one way or the other. People will typically only list references that they know will speak well of them, so it's kind of a stacked deck, but there are a few things to be aware of. One is, I think it is a red flag if they don't list someone from a recent job as a reference, especially if it was a longer-term position. Of course, you'd want to ask about that. Two is, I suggest having the candidate set up the interviews with his or her references. This kind of serves as another mini audition to see how efficiently they are able to do that. That suggestion comes from the *Who* book on hiring that I mentioned earlier.

Questions for References

1. How would you **rate the candidate** on a scale of 1-10? What would they have to do to be rated a [+1 from the ranking given]?
2. What **kind of situation** would you not hesitate to put the candidate in? What kind of situation would give you pause?
3. **Provide an example** of how the candidate raises the bar for herself and for those around her.
4. Would you **rehire** the candidate?

Three is to ask good questions, and I've put the ones we use on the slide. The *Who* book on hiring has some other good ideas. One question is, "How would you rate the candidate on a scale of 1 to 10?", and then, "What would they have to do to be rated +1 higher from the ranking that was given?" Obviously, if they say "10," you're not going to ask that follow-up question, but you want to see. That is kind of a creative way at getting at what some of their weaknesses are or areas where they could improve without specifically using those words.

Two is, "What kind of situation would you not hesitate to put the candidate in?", and then, "What kind of situation would give you pause?" Again, this is another way at getting at both strengths and potential weaknesses that doesn't come out and use those words. When people hear those words, they won't share as much because they are trying to give a good reference for their friend or colleague, but if you ask using these words, you usually get the same information just because of the way the questions are worded.

Three is, "Provide an example of how the candidate raises the bar for herself and for those around her," or him, of course. Then, four is "Would you rehire the candidate?"

Submitted By:
Approved By:
Update Date: 11-20-15

Initial Inquiry Chris

PURPOSE:

1. Welcome patient to CCFM.
2. Inspire confidence in and excitement about working with CCFM.
3. Ensure that patients understand the timing of working with Chris (longer wait times for IC and CR and not as many opportunities to schedule follow-ups)
4. Establish minimum requirements for working with Chris.
5. Collect basic patient information necessary for establishing them as a new patient.
6. Inform patient of next steps.

Make it *easy* to sign up and enjoyable, and establish a positive first impression (in alignment with our goal of providing a first-class, high-touch patient experience).

PROCEDURE:

1. Patient watches Video of Chris on the Wufoo Application which covers #1-3 above.
2. Patient checks boxes confirming that they meet minimum requirements to become a patient.
3. Patient fills out Initial Inquiry Wufoo form.
4. Patient submits form.
5. Patient is automatically added to both the Patient Groups Tool in Mailchimp, as well as the NP Onboarding AR Sequence.
6. Proceed to NP Onboarding Initial Inquiry Follow-Up

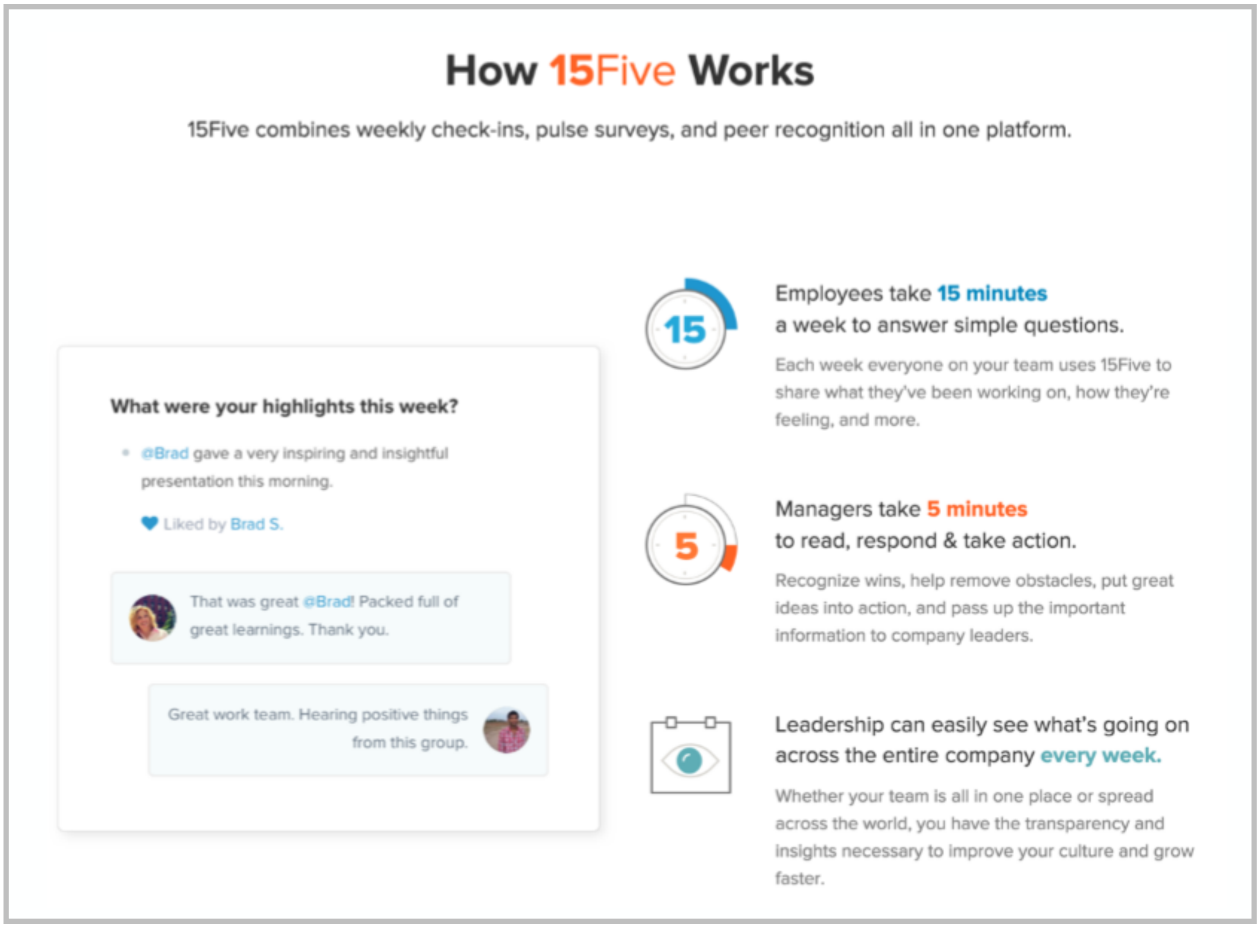
Once we hire the new contractor or employee, the next step is to onboard them and get them up to speed. The written working procedures we've developed for all admin activities are absolutely essential for this. It has reduced onboarding time for a new employee from several weeks to several days. We have written procedures for everything from processing a chart, to onboarding new patients, to ordering labs and supplements, to refilling prescriptions. I'm sharing these procedures with you. You've already received many of them, but we're going to give you everything that we have. You'll need to update them slightly, of course, for your own clinic based on your circumstances, but these will save you an enormous amount of time. I also recommend reading the *Work the System* book to learn more about how the procedures can help you and how you can make your own. You may want to consider working with a *Work the System* consultant, as we did, and we found that to be invaluable.

Patient Service Coordinator Job Description

Responsibilities include:

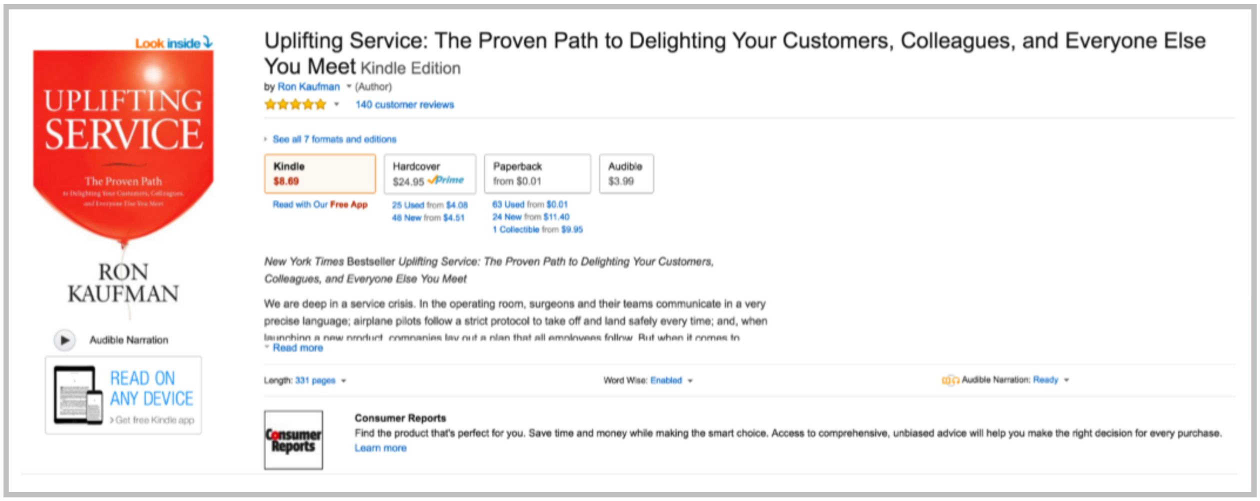
- Communicate with patients daily through the Patient Portal and by phone as needed. This includes:
    - Help patients navigate their Patient Portal.
    - Forward patient's questions to the appropriate clinician and then following up with patient when the clinician replies.
    - Respond to patient inquiries about lab kits and supplements.
    - Start supplement refill requests and send on to billing or the clinicians.
- Follow up on supplements and lab kits that have not arrived after an order.
- Forward requests for refunds/returns on lab kits and supplements.
- Schedule patient appointments and answer questions regarding how to prepare for appointments and help with rescheduling appointments as needed.
- Create insurance invoices for patients.
- Process prescriptions:
    - Forward prescription requests from patients or pharmacies to the clinician.
    - Instruct patients how to add pharmacy information to their Portals.
    - Fax prescriptions to pharmacies or provide copies to patients.
    - Call insurance companies to process prior authorization requests.
    - Provide information about overseas ordering of specific medications as needed.
    - Process doctor letter and obtain updated prescription when patient requests to order medications from the CDD.
- Complete patient follow-up calls after appointments.
- Process patient requests to have clinicians complete forms and letters.
- Update patient credit card information and follow-up on declined credit cards.
- Update patient information with billing department.
- Add supplements, tests and charges to the MDHQ database.
- Upload, label, and flag documents and forms for clinician review.
- Coordinate lab tests ordered by the clinician for each patient:
    - Order lab kits to be drop-shipped to patients (generally done online; occasionally via fax or phone).

It's also important to have a detailed job description for each position that you hire. This helps define expectations and requirements for both employees and employers. I'll share all the job descriptions we've created such as for patient service coordinators, practice manager, operations specialists, special projects administrator, and human resources specialist. Again, you may need to tweak these slightly for your own positions, but they are a great starting place and will save you a lot of time.

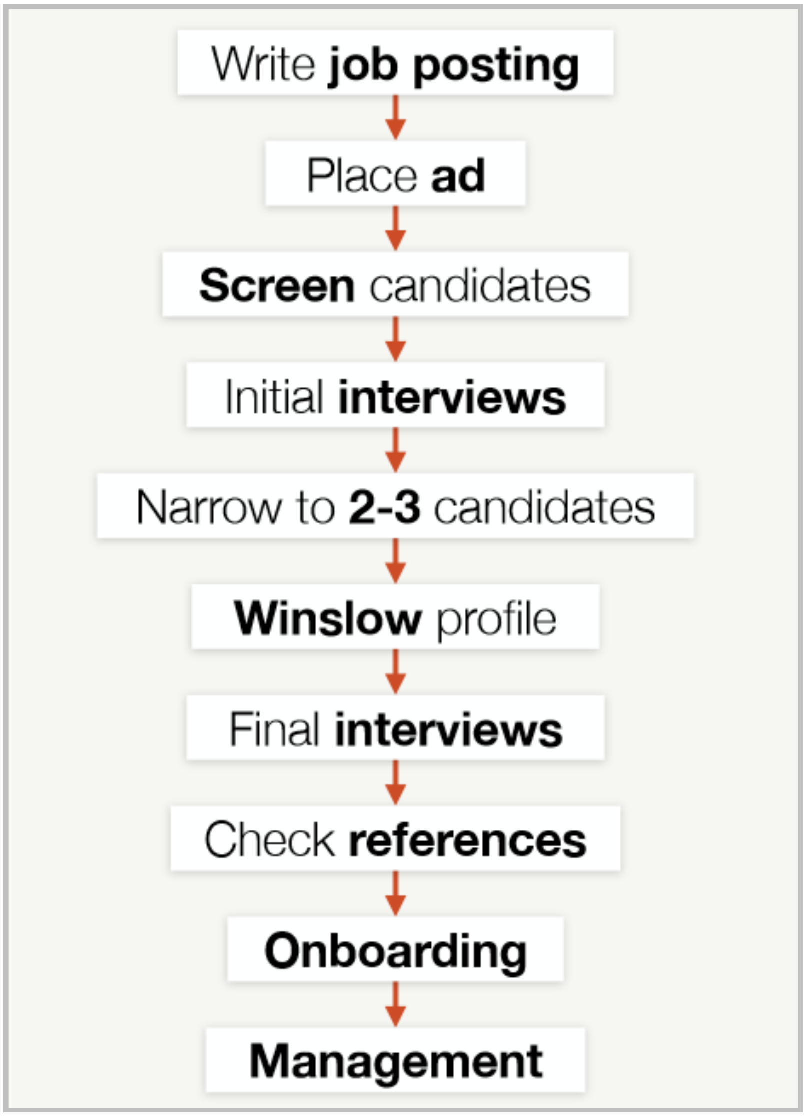


Once you have staff members it's important to evaluate their performance, give them feedback, and make sure that your needs are being met. How to effectively manage employees is beyond the scope of this presentation, but I do want to share one simple tool we've found to be helpful. It's called 15Five, and they call it employee engagement software. 15Five tells you what your employee accomplished, what they are struggling with, how they are feeling, and more. The basic idea is that employees take 15 minutes a week to answer simple questions, and these questions can be customized and changed as you go. You take five minutes as a manager to read, respond, and take action. It's a quick way of staying on top of what is happening, providing feedback, celebrating wins, and addressing issues.

We also have a regular staff meeting using Zoom video meetings as well so we can all see each other. I think this is especially important for virtual teams where it is more of a challenge to stay connected and build rapport. Then, we use other collaboration tools such as Slack, Basecamp, etc., that we talked about in the previous presentation.



We also ask all hires to read a book called *Uplifting Service*. The author, Ron Kaufman, lays out steps you can take to build a sustainable culture that delivers outstanding service every day. It's a really good book, as you can see from 140 five-star reviews. It helps employees to see service as a vocation or calling more than just a job, and I really recommend that you read it too as a clinician. We are, of course, in the service industry, and sometimes with all of the stress of running a business and doing everything else that we do, it can be easy to forget that. I've found this book to be really inspiring. I'll come back to it occasionally just to remind me why I'm doing what I'm doing.



Here is a diagram of the entire hiring process. You write the job posting (which we are going to provide for you, and that will shorten that considerably), you place an ad in any of the locations that we've talked about, you do the initial candidate screening, which may or may not include an audition depending on your setup. Then you do the initial interviews and narrow down to two to three candidates. At that point, you could do a Winslow Profile and an extended audition—if you didn't do it earlier in the process—on those candidates. You would do final interviews and consider the Winslow and audition results. You might then check references, and then you would select the candidate, make them an offer, and then onboard the new position and, of course, ongoing management.

Okay, I hope that was helpful. I certainly wish I would have had this early on when I started hiring people. I think it's going to save you a lot of time and make you better at hiring, onboarding, and managing your new contractors and employees.

Okay, that's it for now. See you next time.