

STOP THE REVOLVING DOOR: How to Hire, Train, and Keep Staff

I. INTRODUCTION.

A tremendous amount of capital, energy, and time is lost in some of our practices each year due to turnover in personnel. There are situations when turnover is unavoidable such as family relocation, sickness, and etc. However, I have seen too many good people leave unnecessarily. One reason for turnover is the lack of a vision of the “big picture”. Instead of looking at the practice as a whole, the doctor and/or office manager sees the individual positions separately, not necessarily as an integral part of something bigger or how the individual positions work together. The number one shortfall is the lack of a team mentality. Stopping the revolving door is all about building and retaining a team.

II. COSTS ASSOCIATED WITH PERSONNEL TURNOVER

- A. Capital. When a trained staff person is lost, for whatever reason, there is a monetary loss associated with their departure. Instead of operating efficiently and proficiently, someone else or the entire staff’s workload just increased. Maybe not as many patients can be seen or optical sales fall off due to the loss of that skill set.
- B. Energy. Momentum is lost. The efficiency and natural flow of tasks suffers as others now have to take on additional tasks.
- C. Time. Time lost is money lost. Time is required to train a new employee and they require time to become proficient at their new job.

III. RECRUIT AND HIRE

- A. Recruiting Good People. The pool from which to draw candidates is diverse. Whatever the source, screening begins immediately before the first interview is ever considered.
 - 1) Carefully review resume’s; Look for red flags
 - a) Job Hopping
 - b) Gaps in employment
 - c) Illness, child-birth, etc. should not be a detractor
 - 2) Look for green flags as well
 - a) Consistency
 - b) Self-improvement
 - c) Upward progression of skill applications
 - d) Continued education
- B. Hiring the right people is one of the most important factors in getting and keeping good, long-term employees.
- C. The Interview System. The interview system should consist of three parts.

- 1) Telephone Interview.
 - a) big time saver
 - b) listen for good phone etiquette
 - c) inform the candidates of the work hours; if the hours are not suitable, no need to go any further
 - d) Have questions prepared for the position interviewing for
- 2) Face-to-Face Interview
 - a) did they arrive on time?
 - b) how do they present themselves? Good as it gets, they are trying to impress you at this point
 - c) have all of your paperwork ready (application, personality evaluation, etc.)
 - d) be sure you are prompt and considerate of their time
 - e) have a questionnaire to review with them
 - f) observe their body language and how they answer questions
- 3) Personality Evaluation
 - a) it is not a test; you are evaluating personality traits
 - b) compare personality traits with the requirements for the position interviewing for
 - c) you are looking for traits that indicate they are naturally suited for the position available
 - d) you still have to train them

D. Shadowing

- 1) If the interview has gone well, ask them to return for one or two hours
- 2) Have them come at a busy time to see the position at the height of activity
- 3) Allow them to spend some time with all of the staff in their area
- 4) Gather the staff of that area to solicit their feedback on each potential hire
- 5) Keep this professional and involving only factual information as it pertains to the position
- 6) Have three to five shadow so you have a selection choose from
- 7) Benefits of shadowing
 - a) Enlightening to them; may decide not for them
 - b) They come to work on 1st day excited not apprehensive
 - c) Coming on a busy day prevents “shock” when hired and activity or pace picks up

E. Professional Handling of Declined Applicants

- 1) Notify them as soon as possible with a polite phone call, letter or email
- 2) Leaving them hanging can create bad feelings
- 3) You may want to contact them later for another position. Ask them if you can keep their resume'

F. Making the Offer

- 1) Hiring the new team member is notifying them of your choice
- 2) Notify them before the deadline you gave them
- 3) Make sure such things as compensation, probationary period, vacation, sick leave, and etc. are all understood
- 4) Most of these should be covered in the Policy Manual

IV. ORIENTATION

A. Expectations

- 1) Introduce the new team member to everyone in the office
- 2) Everyone should welcome them
- 3) Have them read and sign the HIPPA Manual and Policy Manual
- 4) The policy manual should address acceptable/unacceptable attire, acceptable jewelry, personal appearance (grooming, hygiene, and tattoos)
- 5) Personal phone calls and personal visits should be addressed
- 6) Have and review a detailed job description

B. Formal Training

- 1) Before the potential of a new hire can be realized, they must be trained and trained properly
- 2) Have them train with the most knowledgeable person within the job they will be doing
- 3) If they are replacing someone, do not expect the person being replaced to do the training
- 4) If possible, have them train with more than one person to get multiple perspectives of the job
- 5) Example: Front desk person trains them on how to welcome a patient while the insurance person trains them on how to verify insurance
- 6) Give them adequate time with the person training them
- 7) Too often, once they have a grasp of the basics, we turn them loose
- 8) When situations arise that they have not been trained for, they may fall back on experience which may or may not work for us
- 9) Initiative is great, but should be guided

C. Informal Cultural Training. Within the practice what is the.....

- 1) Tone
- 2) Focus
- 3) Attitude
- 4) Goal
- 5) Type of people employed
- 6) Level of customer service expected

D. Evaluations

- 1) Inform the new team member of 30-60-90 day evaluations during the 90 day probationary period
- 2) They must be kept informed of expectations and progress
- 3) Get input from immediate team members
- 4) List things they do well, then areas needing improvement
- 5) Make sure their trainer has properly trained them in areas needing improvement
- 6) Give them a fair assessment of where they are in training
- 7) Give them positive first, then areas needing improvement
- 8) Finish with positive affirmation you are confident they can accomplish required improvements
- 9) At the 90 day evaluation, give them the raise promised
- 10) Reaffirm the benefits they will now have
- 11) If at any time you decide they are not going to be productive, it is time to make the decision to find someone else.

V. INCENTIVES

A. Critical: All members must be eligible

- 1) You want/demand team players, then all team players should reap benefits
- 2) Bonus plan that all players participate in equally is effective tool
- 3) Part-time employees may be excluded or pro-rated based on number of hours working
- 4) Bonus is based on profit sharing in the growth of the practice
- 5) Bonus directly related to quantity and quality of work; extra effort, practice has extra profit; extra profit, extra bonus
- 6) Bonus affirms to the team that they will profit in correlation to how they perform and how the practice profits

B. Bonus Plan Ideas

- 1) If attending a large educational conference, include fun time, not all work. Make it a reward for their accomplishments
- 2) A 3-5 day cruise with team building activities
- 3) Make a local trip a retreat that the team will enjoy
- 4) A monthly, optional based cash bonus

C. Customized Reward System

- 1) Not everyone has the same idea of what constitutes an award
- 2) Money is obvious
- 3) Sometimes a more thoughtful gift is a perfect match for each staff member i.e. someone may enjoy a round of golf at a swanky club out of town; or a gourmet cook may enjoy personal lessons

- 4) Reward does not have to be material in nature, i.e. A coin that represents a pass to get off early to attend a child's soccer game or attend to an aging parent.
- 5) If you invest in a reward system, be celebratory in its delivery; make it special

D. Celebrate Personal Events

- 1) Recognizing milestones in team members' lives helps cement the team concept
- 2) Recognize and celebrate completion of certification
- 3) On birthdays have a potluck lunch with cake
- 4) Building strong relationships builds a strong team

E. Thanks and Praise

- 1) Formula of Appreciation
 - a) Call by name
 - b) Cite specific action deserving of praise
 - c) How it impacts someone else
 - d) Thank you
- 2) Rule of Praise: Praise must be like icing on a cake, evenly dispersed and a good addition