

# SIX WAYS TO BUILD A TEAM THAT ROCKS!

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### ROCK IT!!

#### **R**ecruit and Hire

**Recruiting Good People:** Since a tremendous amount of capital, energy and time is spent in training and hopefully keeping a good employee, it stands to reason that when looking to hire someone you would want to look for the best possible candidates to choose from. The pool from which you will choose your candidates for interview can come from various sources. Whatever the source, screening of the applicants begins immediately before the first interview is ever considered. Carefully review resume's looking for red flags such as "job hopping" or numerous employers in a short period of time or gaps in employment. However, the latter may not always be an indication of problems and may be the result of personal sickness, child birth, etc. Look for patterns of consistency and/or patterns of self improvement such as an upward progression of skill application or continued education. The hiring process sets you up to win by gaining a good, long-term employee. Hiring the right people is one of the most important factors in getting and keeping good employees.

**Interview System:** I consider hiring a three step interview process: 1) telephone interview; 2) face-to-face interview; 3) personality evaluation.

**Telephone interview:** starts the screening and can be a big time saver. Listen for good phone etiquette since everyone will have to occasionally answer the telephone. Inform the applicant up front of the work hours. If the hours are not suitable for them, no need to waste time going any further. Have questions prepared for the specific job you are interviewing for.

**Face-to-Face interview:** Now starts the detailed observation of the applicant. How do they present themselves? If they do not present themselves in a professional manner in dress or demeanor, do not expect them to be professional after they are hired. Remember, this is as good as it gets because they are trying to impress you enough to get the job. Schedule the interview during the telephone interview. If they do not arrive on time for the interview, there is a good chance they will not always show up for work on time. Have all of your paperwork (applications if you use them, personality evaluation, and anything else you would require them to fill out) ready for them when they arrive. Be sure you are prompt and considerate of their time just as you expect them to be prompt and considerate of your time. Have a questionnaire to review with them. Be sure to observe their body language and how they answer the questions.

**Personality Evaluation:** Explain to the candidate that the personality evaluation is not a test but an evaluation of personality traits. When giving the evaluation, you are comparing their personality traits with the requirements of the position you have available. You are looking for characteristics that indicate they are naturally suited for the position; you still have to train them.

**Shadowing:** If the interview has gone well and you are considering them, ask if they can return and shadow that position for one or two hours. Sometimes this is enlightening for them and they decide that this job is not for them. Another benefit is they come to work the first day excited, not apprehensive, because they have already met their co-team member and know what to expect. Shadowing lets the potential hire meet their co-team members and lets them get a good idea of what the job entails. Have them come at a busy time so they can see the position at the height of activity. If they come when activity is low, they are surprised or shocked when the flow picks up. Allow them to spend a little time with all of the staff in their area. This allows you to receive feedback from you staff, although I do not use this feedback as the deciding factor. But, I do consider it part of the process. I like to have three to five candidates to shadow so that I have a selection to choose from. Gather the staff of that area and get their feedback for each potential hire. Keep this professional and involving only factual information as it pertains to the position.

**Professional handling of the declined applicants:**  
When you have made the decision to pass on an applicant, be certain to let them know as soon as possible with a polite phone call, email or letter. Your applicant maybe waiting at the phone daily to hear from you. If you leave them hanging and create bad feelings, the applicant turns into a negative walking billboard. Take the time to construct an excellent rejection letter (it can be done) and craft a well-written email. Keep these on file and ready to send when rejection is necessary.

**Making the Offer.** Hiring the new team member is the notification of the person you have chosen. Notify them before the deadline you gave them. When offering them the position, make sure that such things as compensation, probationary period, vacation, sick leave, and etc. are all understood. Most of these, except individual compensation, should be covered in the Office Policy Manual.

## **O**rientation

**Expectations:** Upon arrival for their first day, introduce the new team member to everyone in the office and everyone should welcome them aboard. Have the new hire read your HIPPA Manual and Policy Manual. Have them sign and date that they have read, understand, and agree to adhere to your office's privacy policy and other policies. I have a page in the back of each manual for signatures and dates so if a problem ever arises, ink lasts longer than the best memory. The office policy manual should address such things as acceptable and unacceptable attire and jewelry for wear at the office. Personal appearance, such as grooming, hygiene, and tattoos should be addressed as well.

Policy concerning personal phone calls and personal visits should be covered as well. Basically, all topics that would have an impact on the professionalism of the office should be covered both verbally and in the policy manual. Have a clear job description of their position and go over it with them to see if they have any questions.

**Formal Training:** Hopefully, you have laid the initial foundation for your success by hiring a team member that has the potential to contribute to the team's overall mission of ensuring the best eye care for the patient. Notice I said "potential". Before the potential can be realized, the new team member must be trained and trained properly. Have them train with the most knowledgeable person within the job they will be doing. Too many times we have them train with the person they will be replacing, a person who may not be doing things correctly or as well as we would like it. Face it, the person leaving has no obligation to train anyone; their mind is most likely looking ahead to where ever they may be going. If possible, I have them train with more than one person so they can get more than one perspective of the job. Example: for the Front Desk check-in, I will have training on how to welcome a patient to the office by my friendliest team member but have the insurance person train them on how to verify insurance. Give them adequate time with the person training them. Too often we give them the basics and as soon as they have accomplished that, we turn them loose. When situations arise they have not been trained for, they usually call on previous experience which may or may not work for us. Initiative is great, but should be guided.

**Informal Culture Training:** An often overlooked management tool is taking the time to plan what type of culture you want in your practice. By culture I mean the tone, focus, attitude, goal, type of people employed and level of customer service offered. If you haven't planned for a specific culture, how can you train it and more importantly how can you expect a smooth system if you haven't created it.

**Evaluations:** Inform the new team member that during the 90 day probationary period you will be sitting down with them every 30 days to evaluate their progress. They must be kept informed of what is expected and how they are progressing. Get input from immediate team members; list the things they do well and any areas that need improvement. Make sure their trainer has instructed and coached them in any areas they might list as needing improvement. It is frustrating for the new team member to be told they need to improve on something they have not been instructed on. Give them a fair assessment of where they are in their training process. Tell them the positive first and then inform them of any areas they need to improve. Finish with a positive affirmation that you are confident they can accomplish the required improvements. At the 90 day evaluation, I give them their raise that was discussed during the interview and offering of the position and reaffirm the benefits they will now have. If during this evaluation process you determine this person is not going to be a productive team member, it is time to make the decision to find someone else.

# Conduct

## Clear Boundaries

## Examples

## Resources

## Discipline

# Knowledge

## Exposure Beyond The Position

## Aware of the Practice Goals and Direction

## Field Trips

# Incentives

**Critical That All Team Members Are Eligible:** If you want and demand team players, then all of the team players should reap the benefits of pulling their fair share of the load. An effective tool I have my doctors use consists of a bonus plan that all team members participate in equally. The only exception is part-time team members. According to how long-term they will be or have been, part-time staff is either excluded from the bonus program or their bonus is pro-rated to the number of hours they work in comparison to the full-time team members. The bonus needs to be based on profit sharing in the growth of the practice. The bonus affirms to the team that they will profit in correlation to how the practice profits.

**Bonus Plan Ideas.** Examples of incentives and rewards we have used include:

- 1) If attending a large educational conference, include fun time and not all work. Remember, 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, optical based cash bonus

## **Customized Reward System**

Not everyone has the same opinion on what constitutes a great reward. Money is the obvious favorite but there are times when a more thoughtful gift that is perfect match for each staff member helps raise the feeling of family. For example, one person may be an avid golfer and love the chance to play a round a swanky club out of town. Another may

be a gourmet cook and enjoy a cooking lesson series. There is even the option to consider rewards that are not material in nature. A coin that represents getting off work early to see a child's soccer game or attend to an aging parent. The point is, if you invest in a reward system then be celebratory in the delivery and do what you can to make it special.

**Make An Effort To Celebrate Personal Events.** Recognition of milestones in each team members' personal and professional life goes a long ways toward cementing the team concept. Accomplishments such as successfully completing certification should be recognized and celebrated. Birthdays are good opportunities to come together for a potluck lunch with a cake. It does not always have to be something elaborate or expensive. Building strong relationships builds a strong team.

## **T**hanks and Praise

### **Formula of Appreciation**

Call by name

Specific action that is deserving of the praise

How it impacts someone else

Thank you

“Linda, you did a fantastic job dealing with that angry patient this morning. It makes everything go smoother for us when you step up like that, thank you.”

### **Rules of Praise**

Praise must be like frosting on a cake, evenly dispersed and a good addition.

### **Secret That Makes The Top 10% Rock.....**

You must be in class to hear the answer to this one. If we put the answer in the handout and everyone would know the secret. Must be present to win.....