

SUCCESSFUL INTERVIEWING AND STAFF SELECTION

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August 11, 2004

Exploratory Paper

This paper is submitted in partial fulfillment of the requirements for election to Fellow status in the American College of Medical Practice Executives

ABSTRACT

Through survey and literature review, this paper will explore the concepts, tools and actions that determine success in interviewing and selecting staff to create the best possible outcome for the practice as well as the employee. It is to be hoped that the end product will provide the medical practice manager with a framework for understanding the difficulties that can occur with interviewing and staff selection as well as provide tools for maximizing successful outcomes.

INTRODUCTION

Interviewing and hiring staff are a seemingly ongoing process in a medical practice. Finding the time to interview can be difficult in the already full schedule of the practice manager. Identifying and selecting the right applicant for the position is critical to the success of the practice.

The résumé is the document that brings the applicant in for interview. Our legal environment restricts the information given in references. What are the key elements of the interview and selection process that determine success? Are there tools to simplify the process and improve the outcome?

THE PROJECT: A SURVEY OF MEDICAL GROUP MANAGERS

An Interview and Staff Selection Survey (Appendix B) was prepared for the purpose of understanding the practice concerns within the medical group manager community. A request for participation in the survey was sent via email to the Medical Group Management Association (MGMA) Primary Care Assembly (PCA) and Assembly of Surgical Group Practice Administrators (ASGPA) listserv subscribers. Seventy-four subscribers returned email messages agreeing to participate in the survey. Seventy of the

seventy-four, who received the survey, completed and returned the survey for a return rate of 95%.

KEY SURVEY FINDINGS

1. The most common interview questions reported focus on identifying strengths and weaknesses and applicant needs and interests. Behavioral questions accounted for thirteen percent of the top interview questions submitted. (Appendix C – Table I)
2. On a scale of 1 to 5 with 5 representing excellent, seventy-six percent of the survey participants rate their interview selection success at 4. Ten percent are at 3 or 3.5 and fourteen percent at 4.5 or 5. (Appendix C – Table II)
3. Those more frequently involved in the interview process include the administrator, manager, supervisor and physician. Twenty-nine percent of the respondents report staff involvement in the interview process. (Appendix C – Table III)
4. While ninety percent of those participating in the survey report interviewing success at 4 or greater, only sixty percent rate the overall understanding and skill of the individuals interviewing at 4 or greater. (Appendix C – Table IV)
5. Seventy-one percent of those responding to the survey reported using a standard interviewing tool or set of questions while twenty-nine percent do not. Eleven percent of the respondents reported using a rating system to rank candidates. Rating systems reported are specific to the individual job description.
6. Fifty-four percent of the respondents indicate the hiring decision is made by interviewers coming to a consensus while thirty-one percent indicate the decision is made by the administrator.

7. Ten percent of the respondents use an interviewing tool or assessment during the interview process. The tools and assessments used include Myers-Briggs, Talent Plus, Gallup, Service Ability Test and Character First. (Appendix C – Question 10)

LITERATURE REVIEW: TOOLS AND ASSESSMENTS AVAILABLE

The literature indicates numerous tools and services available for applicant screening and interview. Assessments are more commonly utilized for sales and management positions in business and industry or hospitals rather than medical groups. In a professional paper exploring pre-employment testing in medical group practice, the author states, “Few medical groups utilize pre-employment testing as part of the applicant screening process. Lack of knowledge about testing regulations keeps many groups from using tests which measure applicants’ intelligence and aptitude, skills and abilities, personality variables and occupational interests.”¹ Current literature review as well as conversations with human resource experts continues to support this statement.

ASSESSMENT TESTS

Assessment Tests are tools to provide additional insight and information about an applicant. The tools can provide insight into an employee’s strengths that when encouraged through personal and professional development can enhance the individual’s success as well as the organization. Assessments are generally grouped into three types:

1. Aptitude or General Intelligence
2. Proficiency
3. Personality and Psychological

Aptitude or General Intelligence Assessments

Aptitude or general intelligence assessments or tests are designed to predict job performance and measure an applicant’s overall ability to learn. Aptitude tests measure

the applicant's knowledge and interests with general questions related to math, spelling, vocabulary and grammar. According to human resource experts, aptitude or general intelligence tests are not easy to validate. Tests should be validated according to the Guidelines for Employee Selection Procedures of 1978 published by the Equal Employment Opportunity Commission (EEOC) to ensure they do not adversely impact a disproportionate percentage of members in a protected class. A test that is not validated can be considered discriminatory, and a company can be held accountable for the validation.

Proficiency Tests

Proficiency tests are utilized to evaluate specific skills and include the applicant performing sample work such as typing for a transcription position, or technical skills for a clinical position. Tests specific to the job requirements are useful in assessing the applicant's knowledge and skill for the position.

Personality and Psychological Assessments

Personality and psychological assessments are used to review the characteristics of the applicant with characteristics that contribute to success in a particular job. Personality and psychological assessments are also difficult to validate and are recommended to be administered and interpreted by individuals trained and certified in the particular assessment and/or psychometrics.

Current literature review and discussion with Human Resource experts through Workforce Management, www.workforce.com, suggests an abundance of resources available for the employer as well as the applicant participating in a job search or career exploration. Only ten percent of the respondents to the Interview and Staff Selection

Survey reported using a personality or behavioral assessment. The assessments presented in this section include those reportedly used by medical group managers participating in the Interview and Staff Selection Survey and those more commonly used in industry. The assessments are listed alphabetically and reflect no recommendation or order of importance or reliability.

Behavior Forecaster™ Abilities Forecaster™ and PASS III® Data Survey

Behavior Forecaster™ is one of three pre-employment tests developed by Michael W. Mercer, Ph.D. and Mercer Systems that evaluates key job behaviors.

<i>Behavior</i>	<i>Description</i>
Interpersonal Skills	Friendliness, Teamwork, Assertiveness
Personality Traits	Optimism, Poise, Objectivity, Rule-following preferences, Focus on feelings versus facts
Motivations	Money, Power, Creativity, Knowledge, Customer Service

The applicant's results are measured against top performers within the organization. The tool is administered to top performers within the organization to establish benchmarks.

The time an applicant needs to complete the Behavior Forecaster is estimated at fifteen to twenty minutes.

Abilities Forecaster™ is a tool to help predict an applicant's abilities on the job. It evaluates five crucial mental abilities:

1. Problem Solving
2. Vocabulary
3. Arithmetic

4. Grammar, Spelling and Word Use
5. Speed and Accuracy in Handling Small Details

This test is estimated to take the applicant twenty-two minutes or less.

Character - PASS-III® Data Survey is the third of the pre-employment tests developed by Michael Mercer, Ph.D. This test evaluates three key attitudes:

1. Drugs/Drinking
2. Alienation/Work Ethic
3. Trustworthiness

The test is estimated to take the applicant ten to fifteen minutes. Dr. Mercer's formula for predicting success on the job is assessing Abilities + Behavior + Character = Success On-The-Job. A sample report is available on the Mercer Systems website.

Character First!®

Character First is built on the premise that character (what a person is) rather than competence (what a person does) determines success. The Character Training Institute has resources, training tools and programs based on forty-nine (49) character qualities that promote success.

DISC™

The DISC style analysis assessment provides insight into an individual's behavior. The assessment indicates strengths, communication style and how an individual with the particular style reacts under stress. There four different styles are:

D = Dominant – How one handles problems and challenges

I = Influence – How one relates to people and contacts

S = Steadiness – Pace and consistency

C = Compliance – Procedures and constraints

Very few people are a pure D, I, S or C. Individuals have components of each style in their make up. Most people tend to have one or two of the characteristics that are stronger than the others. The purpose of the tool is to identify and build on the strengths. The tool also assists the individual to develop an awareness and plan to prevent weaknesses from causing difficulty in communication and performance. The assessment is estimated to take ten to fifteen minutes to complete.

Emotional Intelligence

In 1995, Daniel Goleman presented the model of emotional intelligence based on personal and social competence. In the service industry, Emotional Intelligence Quotient (EQ), (interpersonal relationships, interdepartmental relationships, team relationships), are more important than Intelligence Quotient (IQ). There are assessments and training materials available from many vendors using the Emotional Intelligence Model.

Emotional Intelligence Model

	<i>What I See</i>	<i>What I Do</i>
<i>Personal Competence</i>	Self-Awareness	Self-Management
<i>Social Competence</i>	Social Awareness	Relationship Management

Questions asked in each area of the Model:

- 1) Self-Awareness: Can I accurately identify my own emotions and tendencies as they happen?
- 2) Self-Management: Can I manage my emotions and behavior to a positive outcome?
- 3) Social Awareness: Can I accurately identify your emotions and tendencies as I interact with you or a group?

- 4) Relationship Management: Can I manage the interaction I have with others constructively and to a positive outcome?

Gallup®

Gallup provides a talent based assessment of the organization that is used as a guide for hiring. The SRI (Selection Research Instruments) System is used to identify potential new hires who demonstrate the same set of success factors as the organization's top performers. Gallup provides a wide variety of management consulting and human resources services in addition to the assessment and hiring tools.

HR Assessments™ - Service Ability Inventory for the Healthcare Industry

The Service Ability Inventory for the Healthcare Industry is recommended for healthcare personnel such as medical office staff, medical assistants, nurses, therapists, technicians and office managers. The tool measures:

1. Patient care ability
2. Stress management
3. Team skills
4. Interpersonal skills

Myers-Briggs Type Indicator®

The Myers-Briggs Type Indicator is a psychological assessment that provides insight into an individual's likes and dislikes in a job and traits that the individual tends to have based on their response. The traits combine to form sixteen different personality styles.

Myers-Briggs Personality Traits

(E) Extroverted	(I) Introverted
(S) Sensing	(N) Intuition

(T) Thinking	(F) Feeling
(J) Judging	(P) Perceiving

Talent Plus®

Talent Plus is a structured interview process developed through working with the Talent Plus consultants using focus groups, assessing the company's top performers and determining what defines excellence within the organization. Talent Plus indicates their interview tools are statistically validated to assist managers in identifying and selecting top individuals.

LIMITATIONS OF ASSESSMENTS

Each of the assessments provides information that can add to the interview process, though it is important to recognize that the assessments are simply tools and should not be relied upon as absolute predictors of success for interviewing and hiring. An employer using an assessment or test as part of the interview and selection process needs to ensure validity and compliance with the law. If assessments are used, it is also important to have qualified individuals administering the process and interpreting the results. Tests generally cost \$25 to \$400 per applicant to administer. This may not be practical or cost-effective for the small or medium-sized medical practice. Remember, assessments will not replace the human interaction that is necessary in a successful process.

BEHAVIORAL INTERVIEWING

Behavioral-based interviewing is an interviewing technique of thoughtful questioning to elicit a more in-depth response from the candidate that provides information and insight into behavior and past experience. The two main types of

behavioral interviewing formats are self-appraisal and situation questions. Self-appraisal questions ask the candidate to assess what it is that makes them feel a certain way about what they do to understand more of who they are as individuals. An example of a self-appraisal question is, “If you had the choice of working in a front desk/reception area or a telephone operator position, which would you choose and why?”

Situational questions ask the candidate for actual experience to allow the interviewer to assess and predict future behavior. Situational questions generally begin with “Describe the last,” “Give me an example” or “Tell me about a time.”

Human resource experts recommend managers use behavioral interviewing techniques as part of the interview process. These types of questions tend to yield more in-depth information and interaction with and about a candidate than yes/no response questions or strengths and weaknesses questions.

In the February 10, 2004 MGMA e-Connexion, a case study, “Hire to fit: Ask the right questions, reduce turnover,” provides practical insight into how implementing a behavior-based interviewing process reduced turnover for new hires from 15% to 5%.²

KEY ADMINISTRATIVE SKILLS

The most important skills identified by survey participants as well as literature review include:

Preparation – Be prepared for the interview. Preparation includes scheduling adequate time. According to recent writings by Lou Adler, Human Resources expert³, an interview should take as long as necessary to determine if the candidate is competent and motivated. Mr. Adler recommends scheduling approximately 30-40 minutes for entry-level positions to determine if the candidate is qualified to be sent on for further interview. For higher-level positions, the first interview is recommended at 45 minutes to

one hour. Follow-up interviews for higher-level positions are recommended at 75-90 minutes.

Preparation also includes reviewing the resume and preparing questions for inquiry and exploration of their skills and competencies. A sample Interview Prep Form is provided in Appendix D.

Telephone screening is an acceptable and efficient use of time for pre-screening applicants. Experts recommend allowing fifteen to thirty minutes for a non-management position. Be prepared to describe the open position in general terms. Encourage applicant questions related to the position or to your organization. Prepare three or four questions related to why the applicant is leaving his/her current employer, what he/she does in a typical day or why he/she is applying for the position to gain insight into whether they merit further interview.

Understand and define job responsibilities and description – Selecting the best candidate for the job requires a clear understanding of the job responsibilities and definition of job description. The job description should serve as a basis for developing questions specific to the skills and responsibilities required to assist the manager and staff in the interview process with each candidate. Start with identifying the five most important responsibilities and what it takes for an individual to be successful. Consider and talk with your most successful employees to crystallize this information. It is important to also include questions related to practice culture and mission to more completely assess the candidate's fit within the organization.

Four key questions Diane Arthur⁴ recommends asking yourself in preparing for the interview process:

- 1) Am I thoroughly familiar with the qualities we're looking for in an applicant?
- 2) Are these qualities both job related and realistic?
- 3) Can I clearly communicate the duties and responsibilities of this position to an applicant?
- 4) Am I prepared to provide additional relevant information about the job and the company to an applicant?

Involve staff – Consider involving key staff in the interview process. Staff provides insight and clarity in defining the job responsibilities and assessing the fit within the organization. Staff members involved in the candidate selection process are more likely to assist with ensuring his/her success with the organization. It is important to be clear on expectations for both management and staff and to provide training to build success and support for the process. Staff interviews may be conducted individually or by a panel or group. The panel or group process may be more comfortable for staff and of benefit in building consensus. It is just as important to establish expectations and guidelines for the group as for the individual interview process. It is also important to inform the candidate of a group interview.

Identify and involve technical interviewers for a technical position – Don't try to assess the technical skills alone. Engage key individuals, intimately familiar with the skills and knowledge needed for the position, to assist with the interview and selection process. This may be staff and/or physician members of the practice. Establish a process with clear expectations so that expectations are met for all involved.

Listen – Sharpen your listening skills and use them during the interview. Human resource experts suggest if you are talking more than 25% of the time, you may be

talking too much. The purpose of the interview is to learn and observe as much as possible about the candidate's skills, knowledge and potential fit for the position within your organization. It is important to provide information about the practice, why it is a good place to work, the mission, culture and expectations for the organization. However, be aware to not conclude more from the candidate than what he/she answered or lead the candidate to the answer you want to hear. If you find you are talking more than the candidate, remember to stop and listen and consider that listen is silent in a different order.

Reference checking – Reference checking is more difficult today than ten years ago. The difficulty comes with our litigious society and resulting restrictions in information provided by former employers. In larger organizations, human resource departments may only provide verification of dates of employment and eligibility for re-hire. Approach the reference check as another important part of information gathering in the interview process. If you can contact the candidate's former supervisor or manager directly and engage the individual in a conversation to build a rapport, you are more likely to obtain information about the candidate. Make the call and listen to the tone as well as content of the conversation.

Managers, staff and physicians can be caught up in the enthusiasm of finding a candidate that seems like a good match, resulting in a reference check that occurs on a cursory level or not at all. While it may be difficult to obtain detailed information about a candidate, it is important to establish a consistent reference checking process for the security of the practice. Reference checks should be done prior to offering a position to prevent any conflict that may occur as a result of information learned during the process.

In addition to reference checks, background checks, which are performed routinely for government and high-tech companies, may also be performed. Experts indicate that 90% of all hiring mistakes can be prevented through proper background checks. Background checks rely on outside agencies that research court records for information related to criminal convictions, DUI, etc.

There may be manager or physician relationships that allow for “inside information” about a candidate. This is sometimes valuable though can be dangerous as the truth surrounding the situation may be distorted by emotion. This can lead to judgment that unnecessarily eliminates a candidate from consideration. On the other extreme, the source within the practice may lobby for the individual without full consideration of other candidates and information learned in the process.

Other – Other information that supports success in the interview and selection process might include requiring an applicant to complete a written job application. The job application allows for additional information not necessarily found on a resume as well as an assessment of on-the-spot grammar and written skills.

Exit interviews can also be utilized to support the interview and selection process. Information gathered on exit interviews requires review and consideration, particularly in areas where there is high-turnover. Questions to understand if the practice contributed to the decision to leave, if there was anything that could have made the job more manageable or rewarding or if orientation to the job was adequate or could be improved, may reveal areas of opportunity for the practice. Examining what is common to people leaving the practice or particular position, investigating trends, considering

responsibilities and possibilities for improvement, all can assist the practice to recruit and retain the best employees.

Reviewing the interview and selection process after a successful hire is also a way to learn and improve the process. Encourage feedback as new employees provide valuable insight and perspective to the practice and process.

AVOIDING PROBLEMS, IMPROVING RETENTION AND MAKING THE BEST MATCH

Interviews are complete and it's time to make the decision. There is no magic way to ensure you select the right applicant for the position. In addition to following the steps outlined above, experts recommend an applicant not be hired without having at least two separately scheduled interviews. This may be done by having the manager, supervisor or human resources representative conduct the initial interview. Applicants selected for further interview are then scheduled with the staff and/or physician with whom they would work. While you don't want to delay the process and miss a potential star, you also want to make sure the star still shines as time goes on.

In addition to ensuring the candidate is the right match for the practice, the candidate needs to ensure the practice is right for him/her. Clear understanding of the practice mission, culture and job expectations are important. Some practices indicate the top candidates spend time with future co-workers to get a sense of the people and observe the reality of the job to help the individual make a more informed decision.

Listen and observe as you walk around the practice with the applicant. Is there a look of shock or disbelief as you approach the busy work area? Is the candidate open and friendly to those he/she meets?

Interview guides can also include rating scales to assist with the decision process. A team of interviewers rating the applicants on a scale of 1 to 5 or 1 to 10 can score the

tool and make recommendations based on the scores. The concern with assigning points is that factors the applicant is evaluated on may be subjective and not job specific, for example appearance, maturity, tact and self-confidence. Busy interviewers can become reliant on forms with a scoring scale and potentially check off the boxes without seriously assessing the applicant. It is important to note specific comments on each individual soon after the interview, otherwise it will be difficult to recall and distinguish between applicants at a later time.

WHAT HAPPENS IF YOUR SELECTION ISN'T WHAT YOU EXPECTED?

When you've gone through the interview screening and selection only to have your new hire leave within weeks, it's important to step back and look at what occurred. As humans, we may tend to blame the candidate and assume he/she didn't really know what they wanted. While that may have merit, it is also important to examine the process and see where there may be opportunity. Examination should be done from a positive perspective rather than one of blame or personalizing.

If staff were not involved in the process, consider involving them to engage them in the success of the new team member. If staff were involved, it's important to debrief after the employee leaves as they will likely be discouraged with the departure. Allowing rumors or negative reactions to go unaddressed only demoralizes the group further. A demoralized staff leads to decreased productivity and additional turnover. Developing a recruitment plan, engaging the staff and clearly communicating expectations and progress are key in keeping everyone focused on building the team.

It takes time and energy to hire and train a new employee. In 1999, the cost of a bad hire was estimated between \$6,000 to \$30,000. The tangible and intangible costs

related to a bad hire are likely much greater in today's dollars. Some articles estimate the cost of a bad hire at 1.5 times the annual salary. In addition to the disruption this causes for staff and practice processes, there is also a cost implication with patients.

Selecting the new staff member is just the beginning. It is critical to have an orientation process that integrates the individual into all aspects of the work environment. Again, step back and examine the orientation plan and process. Meet with staff to understand their perspective. Avoid being defensive and recognize and work through defensiveness in staff.

If you realize soon after hire that the new hire isn't what you or the staff expected, schedule time to review the concerns and determine a plan of action. Depending on the findings and the new hire's response, there may be opportunity for an action plan to support additional training and orientation along with clear and agreed upon expectations for performance and accountability. If the situation does not improve, further action is required. Even with a specific introductory period, it is important to document concerns and follow your company disciplinary process to avoid legal implications.

WHAT HAPPENS IF YOUR SELECTION IS WHAT YOU EXPECTED?

The goal is to interview and select the right candidate for the position the first time. A strong interview process, a pool of qualified applicants, staff and physician support and a candidate that accepts the position is ideal. It is important to initially define what you are looking for in the candidate and for the position so that you will know when you find the right match.

It is important to communicate the new hire's acceptance and start date to the staff and to plan for the orientation. Staff are also to be acknowledged for any part they played

in the interview and selection process, even if the part was simply to smile and welcome the applicant upon interview. Staff have a key role in supporting the new person's success and integration into the team. Take the time to thank the staff and to establish the expectation of success.

RESULTS OF RESEARCH

SURVEY

The detailed survey results are located in Appendix C. Eighty-six percent of the respondents report an above average to excellent success rate in interviewing and selecting new hires. It is interesting to note that while respondents report a high success rate for selecting the right candidate for the right position, the overall understanding and skill of the individuals conducting interviews is rated closer to average. The interview participants reported by frequency are the Administrator, Manager, Supervisor, Physician, Staff and Human Resources Manager (Appendix C Table III). Additional comments on several surveys identify concerns with staff and physician interviews. Given this information, it appears there is opportunity for review and additional development of interview skills for those involved in the process.

The top interview questions reported relate to strengths and weaknesses and candidate's needs or interests. These two question types account for sixty-two percent of the total questions provided. Behavioral-based interview questions account for thirteen percent of the top interview questions reported. Additional questions that are not specifically related to the previous types are classified as "Other". The "Other" questions are open-ended and thought provoking designed to strengthen the assessment of an applicant's knowledge, experience, understanding and desire for the position. Questions are listed in Appendix C after Table I.

The most important skills identified by respondents are listening, preparation, clear understanding of the job responsibilities and description, involving staff and a technical resource. The majority of respondents utilize a standard interviewing tool or set of questions while very few utilize a rating system to rank applicants.

Fifty-four percent of the respondents report the hiring decision is made by consensus. Only ten percent of the respondents report utilizing a personality or behavioral assessment (Appendix C – questions 9 and 10).

LITERATURE

As noted in the previous section, the most common questions reported in the survey related to strengths and weaknesses. The literature review supports the use of strengths and weaknesses questions and suggests the strength question is an “ice breaker” that permits the individual to relax and talk about what makes him/her unique or special. In general, applicants anticipate and prepare for the strengths question. It is important to further explore a response filled with descriptive adjectives rather than action. Experts recommend using behavioral-based interview questions to get below the surface to better understand the applicant’s knowledge, experience and desire to perform. For example, if an applicant says he/she is a hard worker, a follow-up behavioral-based question might be, “Give me an example of how your hard work has been a benefit to you and your company in terms of quantity of work produced or in quality of your work.”

Once the applicant has answered the strengths question, it’s time to get a little tougher and move on to weaknesses. While applicants are often aware this question is a possibility, many are still unprepared for the reality. Literature and practice find people do not want to let you know they have a weakness and often do not understand the

purpose of the question. As a result, if the applicant is stressed, as is often the case in an interview situation, the response may be poor and not what you really asked for.

The intent of the weaknesses question is generally not to make the applicant nervous, but rather to observe the level of understanding and reaction to a difficult topic. Answers that are related to an applicant's frustration or intolerance of his/her own weakness, such as a tendency toward perfectionism with awareness and action by the applicant for improvement, demonstrate a maturity and understanding that our weaknesses tend to be our strengths taken to extreme. Behavioral-based interview questions are again recommended to further explore the applicant's fit within the organization.

Be alert to concerns or "red-flags" in the interview process. If you find yourself wondering if the applicant's interest and expectations are consistent with yours, clarify the expectations and determine the next step together. Don't get caught up in hiring someone just to fill the position or hiring because he/she is nice. Stay on track and follow a consistent process.

BEST PRACTICES

TOP TEN WAYS TO ENCOURAGE INTERVIEW AND STAFF SELECTION SUCCESS

- 1) Hire from Inspiration and not from Desperation. Don't settle for the best of the worst.
- 2) Define what you are looking for and expect for the position.
- 3) Define what you are looking for and expect in a candidate.
- 4) Be aware of the "right person-wrong opportunity."
- 5) Consider there is no such thing as a good or bad employee – just a good or bad fit.
- 6) Recognize that resumes are not always an accurate reflection of the candidate.
- 7) Use interviews to probe, not to screen people.

- 8) Listen for applicant strengths that match your organizational needs – be alert to “red flags” and explore further.
- 9) Know your employees and save your data. Track and keep a list of the talent and expertise within your organization. Review it periodically and look for opportunities to develop and promote your staff.
- 10) Walk in your employees’ shoes on a regular basis and listen for the opportunities and challenges.

ULTIMATE SUCCESS CONTINUING – TRAINING AND DEVELOPMENT

Just as organizations develop an annual budget, it is important to develop a workforce plan. Workforce planning is defined as a systematic process for identifying the human capital required to meet the medical practice goals and develop the strategies to meet these requirements. Workforce planning is a continuous process of identifying the organization’s needs, considering the current workforce and anticipating and planning for changes that will occur in the next five years. The aging population presents challenges to healthcare organizations as providers and employers. It is not only important to strategically plan for services, but it is also vital to plan for, maintain and develop quality staff with the right skills. This is an area for further study and development within the medical practice community.

CONCLUSION AND RECOMMENDATIONS

THE USEFULNESS AND APPROPRIATENESS OF ASSESSMENTS

Assessments are tools to provide additional insight and information about an applicant. They are not intended nor should they be used as the determinant for hiring. Assessments can provide insight into an employee’s strengths that when encouraged through personal and professional development can enhance the individual’s success as

well as the organization. If you use assessments, be sure to periodically evaluate the effectiveness and process. If you are considering assessments, evaluate your interview and staff selection process first to ensure you are maximizing your effectiveness. Explore the options and consider what you want to accomplish with assessments. Request client references from vendors to interview medical practice managers to hear their experience and perspective of investment return first-hand.

A FORMULA FOR SUCCESS

The key to successful interviewing and staff selection is in the confidence and preparedness of the practice manager. While there may be several others involved in the interview process, the individual responsible for the daily operations and success of the practice establishes the expectation and direction for the process. Based on the literature review and the wisdom of survey participants, listed below are four steps recommended as a formula for a successful hire.

H = Have a plan that encourages a consistent and efficient interview process

I = Involve appropriate staff and ensure they are prepared to succeed

R = Remember to allow adequate time for the interview

E = Evaluate the process and celebrate success

¹ Mary Pat Whaley. "Development of a Pre-Employment Testing Program in Medical Group Practices," MGMA Article Archive, September, 1995

² Nick A. Fabrizio Ph.D., CMPE. "Hire to fit: Ask the right questions, reduce turnover," MGMA e-Connexion, Vol. 0, Issue Special Supplement, February 10, 2004

³ Lou Adler. "Answers from Lou Adler: Interviews, Employee Referrals and Job Branding," Workforce Management www.workforce.com/archive/article/23/75/47

⁴ Diane Arthur. Recruiting, Interviewing, Selecting & Orienting New Employees, 3rd ed., (New York: AMACOM, 1998.) p. 95.

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Appendix A

Dear Colleagues,

I am in the process of completing the Professional Paper Requirement for my goal of Fellowship in ACMPE. My paper is on interviewing and staff selection. I value your expertise in this area and would appreciate your assistance in completing a brief survey. Please email me at [email](#) if you are interested in participating in the survey and I will send it to you directly rather than post to this listserv. Thank you for your assistance. Sincerely,

_____, CMPE
XXX-XXX-XXXX

Appendix B
Interview and Staff Selection Survey

This Survey is for use in the process of completing a professional paper for submission to the American College of Medical Practice Executives. All respondents will be kept confidential. Please fax or email the completed survey _____, CMPE at fax:XXX-XXX-XXXX or email _____. Any questions or concerns should be directed to _____ at XXX-XXX-XXXX or [email](#) .

1. List your top two interview questions.

2. Considering your interviewing and use of your top two questions, on a scale of 1-5 (1 = poor and 5 = excellent), how would you describe your success in selecting the appropriate candidate for the job. _____

3. Who is involved in the interview process? Check all that apply:

Administrator ____
 Manager ____
 Supervisor ____
 Physician ____
 Staff ____
 Human Resource Manager ____
 Outside Agency/Placement Service ____
 Other _____

4. How would you rate the overall understanding and skill of the individuals performing interviews using a scale of 1-5 (1 = poor and 5 = excellent)? _____

5. What would you identify as the most important skills for effective interviewing and selecting of staff?

6. Is there a standard interviewing tool or set of questions used by all interviewers? ____
 If yes, please attach a copy of the tool or questions.

7. Do you use a rating system to rank candidates? _____
 If yes, please attach a copy.

8. How do you determine whom to select for the position?
 Administrator makes decision _____

Human Resources make decision _____
Interviewers discuss and come to consensus _____
Physician makes decision _____
Other _____

9. Do you utilize any personality or behavioral assessments as part of the interview process (i.e. Myers-Briggs, DISC, Personal Interests Attitudes and Values, Emotional Intelligence)? _____

If yes, please list the name of the assessment. _____

10. If you answered yes to #9, how would you rate the predictability of success of the assessment using a scale of 1 to 5 with 1 = poor and 5 = excellent? _____

11. What have you learned that does not support your success as an interviewer?

12. Please add any other comments or questions you see as critical to the interview and selection process:

Appendix C Interview and Staff Selection Survey Results

Question 1

There were 126 questions provided in response to the request for top two interview questions. The questions are grouped into five types:

- Strengths and Weaknesses
- Candidate's Needs, Interests
- Goals
- Behavioral Questions
- Other

TABLE I – TYPES OF QUESTIONS

QUESTION TYPE	NUMBER OF RESPONSES	PERCENT OF RESPONSES
Strengths and Weaknesses	41	33%
Candidate Needs/Interests	37	29%
Behavioral Questions	17	13%
Candidate Goals	6	5%
Other	25	20%
Total	126	100%

Strengths and Weaknesses

When asking about strengths, the questions may be direct requesting the candidate to elaborate on their strengths, strongest qualities or attributes, proudest achievement, accomplishment or greatest satisfaction in a job. Questions providing a variation on the strengths theme include:

- Give two or three strong points of your personality.
- What are the strengths you possess and how will this allow you to benefit the company?
- What do you feel you can contribute?
- What unique quality do you bring?
- If it comes down to two people, why should you be hired?
- What type experiences in your past have specifically prepared you for this job?

When asking about weaknesses, the questions may also be direct requesting the candidate to talk about his/her weakest attributes or the worst thing a reference would say about him/her. Questions providing a variation on the weaknesses theme include:

- Give two or three points you would like to improve on.
- What are some challenging areas an employer can assist you with developing?
- What is your philosophy regarding process and performance improvement?

Candidate Needs or Interests

Questions asked about the candidate's needs or interests are used by interviewers to obtain a sense of the level of interest, commitment and expectations about the position. Questions provided by respondents include:

- Why are you interested in working for this company?
- What attracted you to this position?
- List your top two to three needs in being satisfied by a job.
- Tell me what kinds of things you did in your last job? Was there anything you really liked or anything you didn't really care for?
- What were the best and worst things about your last job?
- Why are you leaving where you currently are?
- What do you expect the practice to do for you?
- What are you looking for?
- What are your expectations from your job?
- Why do you want to be on our team?
- What are your expectations from a supervisor or manager?
- What in your view are the three most important skills of a manager?
- What were your likes and dislikes of past managers?
- Describe your best supervisor.
- What are your innate talents (i.e. what are you good at)?
- What are you passionate about in life?
- Describe to me a perfect work day.
- What are the most important things for you in your work environment?
- What is important to you about coming on board with our company?
- What research have you done on our company?
- If you desire to work here, what do you know about us?
- A year from now, how will you know you've made a good choice in your job selection?

Candidate's Goals

Questions specifically about what the candidate sees as their career path including:

- What are your five-year career goals?
- Where do you see yourself in five years; in ten years?
- What are your short-term goals?
- What are your long-term goals?
- What are your professional and personal goals?
- What are you passionate about in life?

Behavioral Questions

Behavioral or situational questions asked are generally focused on understanding how the candidate prioritizes workload, reacts under stress and deals with conflict. The behavioral questions require the candidate to describe or tell the interviewer about a situation they have experienced, how they handled the situation and what they learned as a result. In the process of describing or telling about the situation, the interviewer has an

opportunity to listen and observe as the answer generally provides a deeper insight into who the candidate really is related to their behavior and response versus who they want the interviewer to think they are.

Situational questions are also used to elicit insight into how a candidate might react to a stressful situation, multiple priorities or conflict. The respondents noted in asking these questions, they do not have pre-conceived ideas as to a “right” answer but rather observe how the individual reacts to and answers the question.

Behavioral Questions

- Tell me about a situation in which you handled conflict in an office.
- Tell me a time you were frustrated at your previous job. What did you do and how did you resolve the concern?
- Describe a stressful work incident that you have experienced and describe how you handled it.
- Give me an example of a failure and how you handled the clean-up.
- Describe a time you had to inform a supervisor or manager of an error you made or discovered.
- Describe a “good” day at work. Describe a “bad” day at work.
- Describe a time you successfully provided a solution to a challenge in your last job.
- Tell me about a situation in which you had to handle a difficult patient; a difficult physician; a difficult manager; a difficult co-worker.
- Describe a success or a learning experience you had in your last position.
- Tell me about the last time you became angry at work.
- Describe a problem in a former job. How did you handle it? Who did you go to?

Situational Questions

- You have multiple priorities: The doctor needs you to call for lab results, a patient is waiting in the room to be prepped, a patient is holding on the phone, two patients are in the waiting room ready to be called back – What do you do?
- You arrive at work, your phone is ringing, there is a note taped to your computer from your doctor who wants to see you immediately, there is an angry patient demanding to talk with you right away and the first patient of the day is ready to check in and hands you their paperwork – What do you do?
- If you had a patient screaming at you about a problem with their bill, what would you do? Explain

Other

Questions that did not fall within the previous types are presented in this area. There are a variety of questions that respondents found to be helpful in their interview experience.

- Describe yourself in less than three words.
- How do you prioritize your tasks and why?

- Tell me about your most recent work experiences – What did you actually do all day?
- Would you be dishonest to further the Practice’s cause? (If they cheat an insurance carrier, they may cheat an employer)
- What analysis did you perform and what changes in the organization occurred as a result?
- Who did you report to and who reported to you?
- What does your sock drawer look like? (No right answer – more to test reaction to unexpected)
- What pushes your buttons?
- What ways can an employer and employee contribute to develop a positive working relationship?
- What could you change about your existing job to make it a job that you would not be interested in leaving?
- What experience do you have within a medical practice?
- What is your wage requirement?
- What would you consider to be a good reason not to come to work?
- How would you best describe your overall work ethic?
- What obstacle have you overcome in the work environment?
- Tell me about your leadership style.
- What was a problem you had with another company? What was the solution and were there any consequences?
- Do you have any questions that were not answered fully during the interview?
- What do you do for fun?
- What male, female, being, person would you like to interview?
- How do you contribute to customer service?
- How do you deal with stress in your life? (i.e. The things you do in your life to keep harmony and joy in your life.)
- How do you have fun at work?
- What makes you a happy employee?

Question 2

TABLE II – Ranking Your Success in Selecting the Appropriate Candidate for the Job

SCALE	1	2	3	3.5	4	4.5	5
PERCENT	0	0	7%	3%	76%	4%	10%

Note: Scale of 1 to 5 (1=poor and 5=excellent)

Question 3

TABLE III – Who is involved in the interview process?

TITLE	PERCENT OF REpondENTS
Administrator	70%
Manager	60%
Supervisor	50%
Physician	47%
Staff	29%
Human Resources Manager	24%
Outside Agency/Placement Service	6%
Other: Various staff that will be working with candidate	3%

Question 4

TABLE IV – Rate the overall understanding and skill of the individuals interviewing.

SCALE	1	2	3	4	5
PERCENT	0	4%	36%	41%	19%

Note: Scale of 1 to 5 (1=poor and 5=excellent)

Question 5

The most important skills for interviewing and selecting staff identified by the respondents are:

- Listening to the candidate and allowing the candidate to do most of the talking
- Listening to your gut and investigating areas of concern
- Being prepared for the interview reviewing job description, resume, questions and scheduling adequate time for the process
- Clear understanding and definition of the job responsibilities and description
- Involving staff who will be working with the new employee in the interview and selection process
- Involving technical interviewers for jobs requiring specific technical skills
- Recognizing resumes and references are not always accurate

Question 6

Seventy-one percent of the respondents use a standard interviewing tool or set of questions while twenty-nine percent do not.

Question 7

Eleven percent of the respondents use a rating system to rank candidates while eighty-nine percent do not.

Those responding yes to using a rating system provided the following additional comments:

- A rating system is developed in conjunction with the job description and discussion with the supervisor

- A rating system based on the individual position description that always includes teamwork and mission.
- An informal scale of 1-10 is used.
- A scale of 0-3 is used in conjunction with qualities related to the job description, communication skills, appearance, interest, personality and experience.
- A matrix is used for managerial positions.

Question 8

The decision of whom to select for the position is made by:

Interviewers discussing and coming to consensus	54%
Administrator makes decision	31%
Other (see notes below)	10%
Physician makes decision	4%
Human Resources makes decision	1%
Total	100%

Notes: Other includes Administrator and Physician deciding together, input from interview team with Administrator makes final decision, Supervisor/Manager confers with Administrator and Supervisor/Manager makes final decision.

Question 9

Eighty-four percent of respondents indicated they do not use any personality or behavioral assessments, six percent did not respond and ten percent indicated they do use an assessment.

The assessments used include:

Myers-Briggs
Talent Plus
Gallup
Service ability test
Character First character-based interview guidelines

Question 10

The seven respondents using an assessment ranked the predictability of success of the assessments they use on a scale of 1 to 5 with 1=poor and 5=excellent. Results:

<u>TOOL</u>	<u>RATING</u>
Myers-Briggs	4
Talent Plus	4
Gallup	4
Service ability test	4
Character First	3.5

Question 11

Lessons learned that do not support your success as an interviewer:

- Hire from inspiration and not from desperation.
- No matter how prepared you are or how skilled you are at interviewing, you may still hire someone who does not work out. Don't blame yourself.
- Let the candidate do most of the talking. Stay focused on listening.
- Recognize resumes don't necessarily tell the truth.
- Follow basic guideline of recruitment such as calling references and former employers, using an up-to-date application form, inquiring about gaps in education or employment, providing an updated job description, etc.
- Ask tough questions so you are not surprised later.
- If all candidates are marginal, don't hire the "best of the bunch" just to fill the position, reassess needs and re-post for the position.
- Know that some people interview well and work poor.
- Don't rely fully on interview tools. Use your skills, especially listening.
- Trust your gut and don't rush to a decision.

Question 12

Additional comments and questions respondents see as critical to the interview and selection process are listed below unedited.

- Understanding how candidates "fit" into an existing culture is as important if not more important than special skills they bring to a job. Having the candidate observe the job and meet those he/she will potentially be working with is helpful.
- The most important attribute to look for is willingness to learn. You can teach people skills but you can't teach them attitude.
- A focus on service and integrity, these are the overarching things we try to screen for.
- Be patient with the process. Don't hire just because you need a body. Hire the right person and do without until you find the right person.
- A fit with the existing team members "personality-wise" is more critical than the skill set the candidate brings to the practice. Skills can be taught/learned if the individual is intelligent and meets the other requirements.
- My experience tells me that a candidate with good personality matches to existing staff and superior interpersonal skills will be more successful even if they have less than stellar work skills and/or work history over candidates with inferior interpersonal skills and impeccable work skills and work history. Personality blending is extremely important.
- I always find it interesting to see how a new person changes the dynamics of the team. One thing that has worked extremely well for us is having the staff involved. If they feel part of the selection process they don't feel like administration is pushing someone into their territory.
- We should always hire with an eye to the long term fit for the clinic because it just may turn out that way (which can be good or bad). The right personality and the person's aptitude are far more important than their current experience. When interviewing, we should always pay attention to our intuition. Years ago, I

adapted the MGMA application form to one I had used in manufacturing. It gathers a lot of information in two pages that assists in the screening and interviewing process.

- I think it is most important to get the applicant talking then you can listen for hints on their likes and dislikes. Also they will give you a feel about how they think. Also perform the interview in an informal setting works best (meaning across from each other and not in a place that is too formal like a conference room). Getting a feel for their previous position and what they did/did not like about it.
- The process of interviewing is the hardest part of my job in that I know the key is to find a team member who fits. One has to know everyone in the team well and what the team does to really find the right person.
- Body language of the candidate is extremely important.
- Recognizing current employees who meet or exceed the office expectations is instrumental in the interview process. Those employees that are falling behind and not meeting the team expectations are great on interviewing as well since their questions are usually approached from a negative side rather than a positive side. This may give you good feedback as to why there may be a breakdown in communication on that particular team and what you may need to do to address those issues. The current employees understand what it takes to really get the job done and the expectations needed to continue moving forward. They always have the final word in hiring a new employee.
- I usually formulate a feeling about each candidate and I incorporate that into my decision. I also have at least one other person involved, to make sure I am not out in left field about a candidate.
- We encourage the following hiring policy: hire for attitude, train for skills. A positive, enthusiastic person, willing to work hard and learn stands up extremely well against the highly skilled, but unmotivated.
- I could not have believed how valuable it is to have the staff members who will work with the new person SELECT the new person. They certainly understand better than I do what will make a person successful in their role. They also have a much larger stake in helping the new person succeed in his/her new role.
- Basically, interviewing and hiring is a gamble. With such limited one-on-one time with candidates, the often-urgency in hiring a replacement, and some candidates' willingness to exaggerate their skills and talents to land a job, it's a crapshoot. And unless you are a trained interviewer who has a lot of experience in interviewing candidates (and so few of us administrators are), it's difficult to be sure that you have got the right candidate for the job. I'd rate my own hiring experience to be 65% good and 35% bad.
- I also always ask people what hobbies they have, trying to again match personalities. For an administrative position or physician, I ask what the last book they read was.
- Always check references. Have the candidate fill out a job application, you just might find some obvious discrepancies.
- In our community I am surprised at the number of business that do not bother to check both personal and employer references. I think it's critical to do reference

- checks and we do have a tool for that (when past employers will open up and share more than dates of employment and verify past salary history).
- I have also found that official references are useless. The best information on a perspective employee seems to be off the record conversations with previous employers.
 - Even the best judges of people frequently make mistakes. For support staff, the interviews are relatively short and most people can look like a star for 20 minutes.
 - Obtaining meaningful references has become almost impossible, as most former employers are reluctant to give more than the narrow basics; therefore, the interview process has become even more important. I ask a lot of questions along the line of: where do you see yourself in a year? Five years? Ten years? Why do you want to (continue to) work in the medical field? I've gotten some very strange answers too.
 - Thorough reference checks, background checks. Ensure that the interview/selection process is managed productively. Pay attention to the candidate's personality (will they fit in with our group?).
 - Independently verify any critical or important data (licenses, diplomas, specific skills or certifications) and check at least two references. Pay attention to small 'warning signs' and take the opportunity to ask additional questions to clarify those areas.
 - Ask tough questions, get all the cards on the table, check all sources of information.
 - All applicants are subject to a phone interview where they are asked a series of job specific questions. Those that pass the phone interview phase are invited in for a fact-to-face interview. More detailed questions are asked and each interviewer uses a list of job specific questions and the responses are compared. Applicants meet with the lead and the supervisor/department manager. Applicants that pass the first two interviews are elevated to an interview with a physician and/or the administrator, depending upon the job.
 - I always have to weigh the time and effort of interviewing more candidates to find the right one. My schedule and the needs of the practice do not always allow me the time and flexibility to be patient until the "exact fit" candidate is found.
 - Keep physicians away as long as possible...they sometimes have an immediate need to call the candidate's employer (particularly if they know the person). Let the candidate do most of the talking and always have a second interview. When other staff is involved (like a supervisor) getting her to see that she can train someone on the practice management system, etc. What we are looking for is personality, commitment to excellence/patient satisfaction, etc.
 - At the conclusion of the interview...Inquire whether the candidate feels there are any skills or resources we will need to provide in order for them to meet the qualifications of the position.
 - Computer skills are critical. Advanced – intermediate.
 - Best choices are not made urgently. Sleep on it. Mull in over and utilize your 60 days or 90 days of training well. You will not get any better performance as far as desire to please and do a good job than you will in the first 90 days. Look at it and decide, "If this is as good as it gets, do I want to keep this person", because

those first 90 days are as good as it gets. Letting them go will always be easier during the training phase of employment. Check with your state unemployment benefits to find how many days are required to file unemployment and make sure you make your “keep” decision prior to that period. Remember that these people are entrusting their family and their eating schedule on the decisions you make. Make decisions carefully and decisively. Don’t hire someone and have them quit a job if you aren’t sure. I have talked several people OUT of working for us, because it became evident to me, they would be a great asset, and they would be bored in about a week. Helping the other person determine if “it is a good fit” is just as important as my determining that. Always set up the expectation that “we play nice here”. “You don’t have to like everyone here, you just have to make me think you do.” Working politely and courteously is a requirement. Never hire a friend. It puts everyone at a disadvantage. No one will believe you don’t give them special treatment.

- Overall appearance and eye contact are important.
- Use a temp service to screen clerical help. Always check references and verify credentials.
- Do not compromise by feeling you have to fill the position with a “warm body”!
- Understand that the applicant is trying to impress you. Push that aside and ascertain the applicant’s true personality, integrity, work ethic, and decide if there is a fit with the group.
- Learning how to advertise and network to generate the largest pool of potential interviews.
- We have better success with word of mouth advertising rather than newspaper. We are in a somewhat rural area where there are not a lot of candidates looking.
- Be honest about the job, don’t just show a basic job description. Tell the employee the downfalls of the job i.e.: The hours could fluctuate. I always ask if the employee can be here as early as 7:00 am and as late as 6:00 pm and explain that we are a service organization, that if the doctor is running late, we have to stay. Listen carefully...don’t be in such a hurry to get your next question asked, listen to what they are really saying when they answer. Give them enough time to either really win you over or hang themselves with their answers.
- My turnover rate is way under the MGMA averages (one back office opening in two years and no A/R openings in two years, even the front office only leaves to move out of state or by termination). Give me five minutes and one phone call...that is all I need!
- Know what you need to fill your current position. Take time to think this through before the interview. Always, always check references.
- Try to have a relaxed atmosphere, connect and they will give you plenty to evaluate. Also try to use your instincts. First impressions can go a long way. Try to give scenarios that they cannot just answer yes or no to. They actually have to resolve an issue or circumstance for you.
- I’ve been lucky but it’s often a crap-shoot. Trainability, ability to multi-task and be a team player is much more important than education or even experience.
- When checking references for a management position, I always ask if the person I’m calling “had to spend time cleaning up after that employee”. That usually

gets a laugh at first, but then an honest answer! I've learned a lot with this one question.

- Allowing enough time for the process to work is crucial. I'm also careful not to "oversell" the job.
- Scheduling enough time for the interview. Thoroughly reviewing the resume before calling people.

- Interview: how would you handle an irate or very upset patient? (I teach "the patient is always right).” Selection: among much criteria, I examine their “soft” skills. “Soft” skills can make or break a practice.

Appendix D
Interview Prep Form

Candidate Name:

Position Interviewing for:		
Key Responsibilities and Tasks	Pertinent Training and/or Experience	
1)	1)	
2)	2)	
3)	3)	
4)	4)	
Personal Attributes important to the organization:		
Key Areas to Explore	Questions to Ask	Notes
<i>Education</i>		
<i>Previous Experience</i>		
<i>Job Accomplishments</i>		
<i>Skills & Knowledge</i>		
<i>Personal Attributes</i>		
<i>Previous Appraisal or Performance Rating</i>		