



We've crammed over 31 years of Dental Management Experience into this 4 day intensive workshop

## **Dental Practice Management Power Workshop**

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## Mastering Human Resources

### What is Human Resources?

- ✚ Maintenance, awareness of, and compliance with local and federal labour laws
- ✚ Recruitment, selection, and on boarding (resourcing)
- ✚ Employee record-keeping and confidentiality
- ✚ Organizational design and development
- ✚ Business transformation and change management
- ✚ Performance, conduct, and behavior management
- ✚ Industrial and employee relations
- ✚ Human resources (workforce) analysis and workforce personnel data management
- ✚ Compensation and employee benefit management
- ✚ Training and development (learning management)
- ✚ Employee motivation and morale building (employee retention and loyalty)



### Pulse of Your Team

Have you ever felt like a stranger at your own staff meeting? Managers need to be aware of what is happening in their practice; we need to feel the pulse of our teams. Do not get this mixed up with water cooler talk; we need to have a pulse. Write down three ways we can gauge the pulse of our team.

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Notes:*

[illegible]

## They Are Watching You:





Before we start to teach how to manage others, let us talk about how we manage ourselves. I wrote this piece because I often find myself shocked at how I see leadership. Here is the biggest piece of advice I can give you: **THEY ARE WATCHING YOU!**

### Dress Code:

As the leader you will set the bar for your practice's dress code. We've all heard it before "*Dress for Success*"; I do embrace this statement with an amendment "*Dress for the Position You Want, Not the Position You are in*".

### Body Language:

Wikipedia states "Body Language is a form of non-verbal communication, which consists of:"

-  Body posture
-  Gestures
-  Facial expressions
-  Eye movements




Give five positive and five negative examples of these non-verbal communications.

### Positive

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Negative

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



*Notes:*

[illegible]

### Active Listening:

Active listening is the way we listen and respond to others. When we actively listen, it improves mutual understanding. We'll touch on this more during our "Win, Win" module, but you'll know this to be true. When we are engaged in a conflict, we often are busy formulating a response to what is being said.

### *Five Easy Ways to Demonstrate Active Listening:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Put Your Smartphone Away:

It was a quick Google search to see that Smart-Phone, etiquette or lack thereof has become an issue. We have all done it. The VP of some department is rambling on about the metrics and showing Venn diagrams on a PowerPoint presentation and you find yourself reaching for your device. C'mon, no one will notice. Just a quick peek, it is a better use of your time right, and if you don't do something you are going to fall asleep.





*Notes:*

[illegible]

## What to Say:

In your Group, prepare your response to the assigned scenario, how would you expect/want your manager to say.


### Exercise 1

*Scenario One:*

Diane has given you two weeks' notice, she was sincere in stating that she has enjoyed her time working with you and your team, but it is time to move on. You review her schedule and remind her it is business as normal. Diane calls into the office Saturday and tells your greeter that she is sick and cannot come in for her shift. She also calls your greeter two days later and is unable to come in for shift as she is ill.

Below is some history for you to utilize to prepare your dialog.



- Diane has been with your company for five years.
  - Your company pays employees 3 sick days per year.
  - One of the days Diane is absent is during the long weekend.
  - Your staff manual states employees need to talk directly to the manager to report sick days.
  - Diane has been a good employee throughout her employment with your practice.
- 

[illegible]

*Notes:*

[illegible]

*Scenario Two:*

I observed Cindy, a Treatment Coordinator, who comes in every shift approximately five to ten minutes late.

Below is some history for you to utilize to prepare your dialog.

- ✚ Cindy has been with your practice for twenty-two years.
- ✚ Your team members manually enter their login/ logout times.
- ✚ Cindy lives in a bedroom community; traffic is a factor.
- ✚ Cindy is a loyal employee that honestly believes in your practice.
- ✚ You have noted there are times when other staff has been affected by Cindy's constant tardiness.

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*Notes:*

[illegible]


*Scenario Three:*

Dawn approaches you in the morning, she has had enough, and she is tired of team members not holding their own. There are other assistants that never sterilize; instead, they wait for you to leave and then they go in the back and gossip. Dawn is not comfortable naming names, but she is sure that you know who it is and really needs you to take action. Other team members are talking about this issue, and its impacting the team's morale and effectiveness.

Below is some history for you to utilize to prepare your dialog.

- ✚ Dawn has been with the company for six months
- ✚ You have noticed that Dawn is fast becoming the assistants (self-appointed) spokesperson.
- ✚ You are aware and have created an action plan to reduce some of the wasted time with some of your unproductive assistants, but you are not sure if Dawn is talking about the same team members.
- ✚ You were not aware that other assistants were aware of the issue.
- ✚ Dawn shows great assistant abilities, but you are not sure of Dawns fit.

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*Notes:*


[illegible]

Darla has called in this morning, leaving you a voicemail to let you know she will not be in today. She is having personal problems and needs a day off. She notes that she would rather take a sick day than a vacation day because she really needs that trip, she has planned next month.

- Darla is an Assistant working in your practice for the last three years.
- You have heard through the grapevine that Darla is going through a divorce.
- Last week Darla had to leave in the middle of her shift as she was too emotional.
- Darla has three kids

[illegible]





*Notes:*

[illegible]

## The Win-Win Solution

Win-win solutions are the most desirable way to resolve problems and conflicts. When you win and the other person wins, instead of creating a winner and a loser, everybody is happier, and the relationship gets stronger as a result.

Although win-win solutions exist in many situations, it is often hard to see them. We need a special way of looking at things to discover them. I believe that finding win-win solutions happens through effectively applying 3 essential steps.

### *Step 1: Take your negative emotions out of the equation*

The situations where win-win solutions are not evident and need to be found are situations where our interests initially seem to clash with those of another person. They are situations of apparent opposition and conflict.

It is in these kinds of situations that our negative emotions tend to manifest the most: the fear of losing, the anxiety of not finding a convenient way out or the anger at the other person. These emotions, especially when they are intense, tend to cloud our judgment and our creativity, which are the exact tools we need to use to find a win-win solution.

Therefore, it's fundamental that you detach from any negative emotions. Firstly, recognize them when they manifest and bring into your awareness the fact, they sabotage the solution finding process. Secondly, combat the irrational thoughts you may have which feed these emotions. This is, in my view, the most effective way to deal with one's own negative emotions.

### *Step 2: Focus on the solution*

If at the emotional level we have the inconvenience of negative emotions, then at the behavioral level we have the trouble brought by passive and aggressive communication. In a conflict situation, it's very tempting to communicate this way: to justify ourselves, blame the other person, criticize, avoid the discussion or dig up the past.

As we do this, we lose track of finding a win-win solution and so we do not find one. The best way to avoid this phenomenon is to anticipate that it may happen and to pay attention to your focus and communication style in conflict situations. And, every time you catch yourself or the other person straying from the solution finding process, bring the focus of the conversation back.

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### Step 3: Explore the context and options

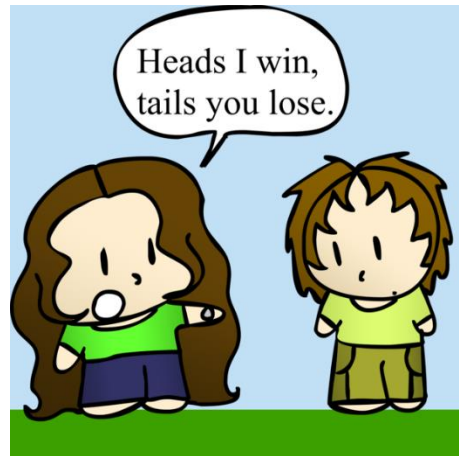
A significant reason why we often do not find the win-win solution is that we don't insist hard enough with the solution finding process. We just give it a quick shot in a semi-chaotic way and then we give up. What we need to do is truly explore the context and the options.

In any conflict situation, start by ensuring that both parties agree to try and work together instead of fighting and state their goals clearly. Continue by exploring the deeper motivations behind the stated goals and understanding each party's story.

Then, get creative and generate solutions. Analyze each solution together; compare them in terms of costs and benefits for each side and agree on one win-win solution which best serves both parties. Finally, put that solution into practice. Stick to this process, apply it systemically, and if there is a win-win solution for your situation you will find it.

I believe it is always best to try and find a win-win solution to a conflict. Many viable solutions remain an unapplied theory because people do not put in the effort to find them and don't approach the whole process in a constructive, effective way.

We live in an abundant world, with many resources. It is a pity to not find the best ways to use and share these viable options.



### Exercise 2

Think of a time where you could have created a win-win solution and didn't, what was the outcome?

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*Notes:*

[illegible]

## Pay and Incentives

### How to Conduct a Salary Based Staff Review



*Notes:*

[illegible]

## Why Staff Incentives Fail

We have seen several staff incentives over the years and yes not all of them fail. Here are some of the most common reasons staff incentives fail:

1. Too hard to achieve
2. Too easy to achieve
3. Team members feel they are not fair
4. Fingers are pointed when goals are not reached
5. Taken for granted
6. People build them into their budgets
7. Too hard to calculate
8. Hard to modify
9. Cost
10. People cheat



*Exercise 4:*

Let us think of ways to motivate our team without creating staff/team incentives.

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*Notes:*

[illegible]

## Enforcing Policies

There is nothing more confusing for your team members than being presented a policy that is not enforced.


Results in not enforcing policies

1. You lose face
2. Nothing changes
3. Team members have a choice of which policy they follow
4. You lose control
5. Wasted Time
6. Your next policy will be ignored
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## How to Enforce Policies

- + Believe in your policies
- + Know your policies
- + Recognize your policies
- + Act immediately
- + Follow through
- + Do not chase the phantom





*Notes:*

[illegible]

## Goal Setting At an Executive Level

Goal setting at an executive level is not

### Smart Goals

<u>"S"</u>	Specific
<u>"M"</u>	Measurable
<u>"A"</u>	Attainable
<u>"R"</u>	Realistic
<u>"T"</u>	Timely



### Specific

Goals should be straightforward and emphasize what you want to happen. Specifics help us to focus our efforts and clearly define what we are going to do.

Specific is the What, Why and How of the SMART model.

- ✚ WHAT are you going to do? Use action words such as direct, organize, coordinate, lead, develop, plan, build etc.
- ✚ WHY is this important to do at this time? What do you want to ultimately accomplish?
- ✚ HOW are you going to do it? (By...)

Ensure the goals you set are very specific, clear and easy. Instead of setting a goal to lose weight or be healthier, set a specific goal to lose 2cm off your waistline or to walk 5 miles at an aerobically challenging pace.

### Measurable

**If you cannot measure it, you can't manage it.** In the broadest sense, the whole goal statement is a measure for the project; if the goal is accomplished, the goal is a success. However, there are usually several short-term or small measurements that can be built into the goal.

Choose a goal with measurable progress, so you can see the change occur. How will you know when you have reached your goal? Be specific! "I want my A/R below one month's production" shows the specific target to be measured. "I want to improve A/R" is not as measurable.

Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goals

*Notes:*

[illegible]

## *Attainable*

When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals.

Goals you set which are too far out of your reach, you probably will not commit to doing. Although you may start with the best of intentions, the knowledge that it's too much for you means your subconscious will keep reminding you of this fact and will stop you from ever giving it your best.

A goal needs to stretch you slightly so you feel you can do it and it will need a real commitment from you. For instance, if you aim to lose 20lbs in one week, we all know that is not achievable. But setting a goal to lose 3lbs and when you have achieved that, aiming to lose a further 3lbs, will keep it achievable for you.

The feeling of success which this brings helps you remain motivated.



## *Realistic*

This is not a synonym for “easy.” Realistic, in this case, means “do-able.” It means that the learning curve is not a vertical slope; that the skills needed to do the work are available; that the project fits with the overall strategy and goals of the organization. A realistic project may push the skills and knowledge of the people working on it, but it should not break them.

Devise a plan or a way of getting there which makes the goal realistic. The goal needs to be realistic for you and where you are at now. A goal of never again eating sweets, cakes, crisps and chocolate may not be realistic for someone who really enjoys these foods.

For instance, it may be more realistic to set a goal of eating a piece of fruit each day instead of one sweet item. You can then choose to work towards reducing the number of sweet products gradually that feels realistic for you.

Be sure to set goals that you can attain with some effort! Too difficult and you set the stage for failure, but too easy sends the message that you are not very capable. Set the bar high enough for a satisfying achievement.

*Notes:*

[illegible]

*Timely*

Set a timeframe for the goal: for next week, in three months, by fifth grade. Putting an end point on your goal gives you a clear target to work towards.

If you do not set a time, the commitment is too vague. It tends not to happen because you feel you can start at any time. Without a time-limit, there is no urgency to start taking action now.

Time must be measurable, attainable, and realistic.

Everyone will benefit from goals and objectives if they are SMART. SMART, is the instrument to apply in setting your goals and objectives.

### Exercise 6

## Create a SMART goal

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*Notes:*

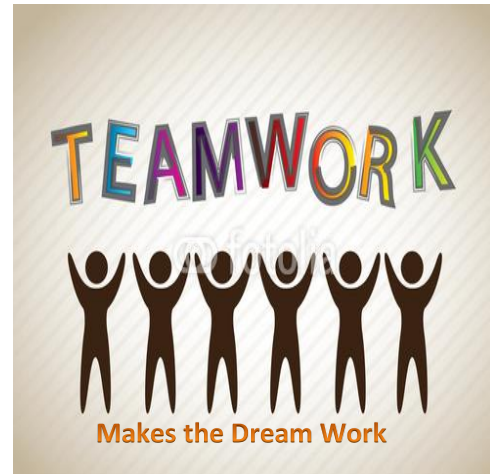
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## Lead by Teamwork

People talk about “leading by example,” but what does that mean? By incorporating the following attitudes and practices into your life, you will not only improve your own life, but also begin to fashion yourself into the kind of person that others will follow and emulate, the very definition of leading by example. So, here are Dr. Schuler’s “Ten Rules for Working and Living:”

### *The Lives We Live are the Lives We Create*

Yes, life is a creative art. Expectations are often self-fulfilling. If we expect life to be good, if we believe it is filled with opportunities and cause for celebration, then we will notice those things and live so as to promote them, even without conscious intent. If we believe life is a marathon of unrelenting toil and scarcity, then toil and scarcity will be all that we find, and experience and we will inadvertently create the circumstances that promote them. You cannot expect to win the lottery and then win the lottery: that is magical thinking, the special realm of childhood (or of adult madness). But you can (and do) nurture a basic attitude toward living and if you do not take control of it, it most assuredly will take control of you.



### *Health and Productivity go Hand in Hand*

We talk a lot about the importance of balance and surely everyone’s definition of balance is, well, different. In order to be productive and healthy, we all have to take care of our minds, bodies and spirits, but the reverse is also true: being productive is inherently healthy, and doing good, meaningful work that fits our talents can keep us alive and healthy a long time. How often do we see someone retire and then fall into poor health? Doing what you love to do and doing it well and especially helping other people learn and succeed, brings benefit back to you. In the end, it does not matter what it is you do, so long as it is not destructive to others and you feel you are contributing. No matter how menial or arcane the job, all work has inherent dignity and can become a medium through which a person can grow and make contribution to others.

### *As We Treat Others, So Shall We Be Treated*

This is about the law of averages. Yes, there is injustice in the world and yes, there is cruelty. Bad things happen to good people and vice versa. But in general, we may sow what we reap. I once read a quote: “Make your words sweet: you may have to eat them later”! People notice how we treat them, especially when we are in positions of leadership and most especially when we think no one is looking. What goes around comes around.

*Notes:*

[illegible]

### *Don't Wait for Solutions: Create Them*

Some people are experts in seeing what is wrong with a situation, system, organization, or person. But what good is such expertise? What does it solve or create? I am forever baffled by people who see themselves as passive - unable to create a solution or work toward one. What does anyone get out of being a perpetual critic? A temporary feeling of power or superiority? What could be a more impoverished way to live than that? Two schools of thought here: the active and the passive. The passive and negative position waits for someone else to make a bad situation better; perhaps faulting others for their inaction (we see this in offices all the time). The positive and active position works to build a productive awareness among those who can influence a negative situation so that all can take collective action to make it better. Guess which type of person others naturally follow - and then imitate?

### *Negativity Kills*

Literally. What is violence but an extreme expression of negativity? But killer negativity does not require a physical manifestation to wreak its havoc. We know that negative thinking weakens the immune system and contributes to disease and to an increase in mortality. We also know that negativity is contagious: for example, when there is a high profile suicide in some community, health experts know to expect a new spate of imitative suicides or suicide attempts, even among those with no social connection to that first poor, despairing person. Suicide and even severe negativity or depression, can spread like an epidemic, or like a cancer. Even in small doses, negativity contributes to illness and ultimately to death. This represents a universal truth of living, or “anti-living.” Why are people drawn to leaders? Because leaders, through their attitudes and abilities to resist or overcome negativity, function like antibodies in the world, fighting negativity and adding “life” to those around them. If negativity is a cancer, then good leaders, just in the way they carry themselves and approach the world, fight that cancer, all the time.

### *Communication Starts with Listening*

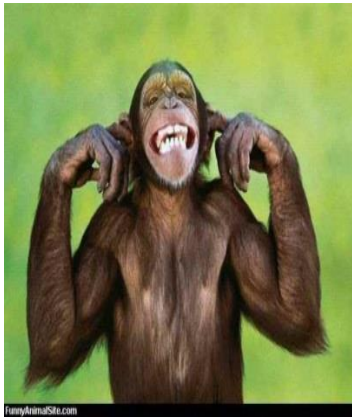
Do not worry about trying to express yourself better (you do not have to be talkative to be a leader). Think instead about asking better questions and then repeat back your best understanding of what you have just heard. Resist the temptation to think about what you want to say in response when carrying on a conversation. You will be amazed at how much you learn and how much better you understand people you thought you understood before. People rightly see leaders as those who understand them, or who make the effort to try to understand them. Only once you have listened, will you have earned the right to speak your own point of view, based on a more complete understanding of other people and the circumstances around them. That is what makes a person an effective leader. By setting a tone of listening, others will follow suit.

*Notes:*

[illegible]

### *Between Two Positions Always Lies a Third Option*

Leaders know that dilemmas that come pre-packaged as “either/or” propositions are usually preset for failure. There is always at least one other way to view a situation, either by expanding the issue, finding a third alternative, or creating a negotiated compromise. There are certainly times to not compromise, but even that decision should only come after a creative examination of as many possible approaches has been completed. But what makes leaders effective is their ability to generate those options, either through imagination or consultation, before making any final decisions. While most people get trapped into defining conflicts as either/or, or win/lose propositions, they end up following those who prove they can craft better solutions, creating value and advantage for all involved.



### *Laughter Cures*

You got to laugh. You just gotta! Life presents too much that is just fun and funny, even absurd. That is the beauty of it. If you keep that attitude about you and nurture it, then you add the power, not only of avoiding negativity, but of adding joy and positivity to your life and to the lives of others. Laughter is even more infectious than negativity and as powerful a force for health. If the laughter comes at no one’s expense, but comes rather from a shared sense of the beauty and absurdity that we see all around us (especially in ourselves!), then people can be drawn to you and your playfulness will catch on.

### *Do Great Work, Have Fun and Lend a Hand along the Way*

Good work is, well, good. Great work is inherently rewarding. Do it with fun and style and you are not a prisoner of your labor, but rather a master of your craft. If you help others along the way, either by teaching them or just by setting them up for their own success, then both life and work acquire greater meaning. None of us live forever and we should all leave a little something behind for the good. This “rule” is one of my favorites; it is one worth repeating and spreading around.

### *In the End, We Are All More or Less Human*

. . . And that is a good thing. We are imperfect. We have bad moods and bad moments. We make mistakes; we have parts of our character that may be less than admirable. That just makes us human. Keeping this in mind helps us refrain from taking ourselves too seriously when we succeed or when we fail and it also gives us some humility and perspective through which to understand the inescapable frailties of others - especially when they fail to see the wisdom of our obviously superior points of view (wink wink, nudge nudge)! In the end, the pursuit of near perfection is more important than its achievement, even if it is good to be competitive and dedicated to excellence in order to bring out the best in ourselves and others.

*Notes:*

[illegible]

## Hiring your Next Super Star

Hiring employees is complicated and challenging and can be one of the most important management functions you perform. Assign it the priority it deserves, and you can boost the productivity and the performance of your entire team. Do it wrong and you risk losing the high-performance employees that will take you and your team to the next levels—or even worse, the following could occur:

- ✦ Dissatisfied or lost customers
- ✦ High turnover and associated expenses
- ✦ Incomplete work
- ✦ Increased operating costs
- ✦ Lawsuits
- ✦ Lost business opportunities
- ✦ Lower morale and higher frustration
- ✦ Poor productivity, poor quality
- ✦ Sabotage
- ✦ Good people going to a competitor
- ✦ Added stress for the existing workforce and management
- ✦ Substandard organizational and personal performance
- ✦ Wasted training time



Most hiring mistakes fall into two categories: 1) hiring someone who should not have been hired, and 2) not hiring someone who should have been. People make these mistakes, often unintentionally, because they have a poor recruiting and hiring strategy—or none. That leaves selection standards unclear. What are the common mistakes?



*Notes:*

[illegible]

## Six Common Hiring Errors

### *Looks Good...is Good*

People tend to react to first impressions and sometimes let one positive attribute or characteristic imply that all other aspects of a person's behavior will be positive. Most impressions are made during the first three minutes of contact. An employee may turn out to be not as skilled or personable as was initially believed and the performance of the organization deteriorates.

### *Looks Bad...is Bad.*

Unlike the previous example, this problem happens when someone is judged to be unqualified because of a negative attribute that may or may not be job-related. A more open-minded approach might reveal that the candidate actually has the necessary skills and could be the best person for the job.

How to be a  
great employee



### *Hiring Yourself*

Too many people want to hire somebody just like themselves to do a job that they cannot or will not do and then wonder why this arrangement did not work out. They fall in love with the personality and react favorably to people whom they perceive as being like them. They do not realize that this similarity may not necessarily mean these candidates are suitable for certain jobs.

*Notes:*

[illegible]

### *Rush to Hire*

Business conditions or growing demands can force a relaxation in hiring standards. If they fog the mirror, they are a strong candidate. Many people overlook signs of trouble in their haste to relieve the burden on the business.

### *Poor Communication*

The inability to ask the right questions or to hear what the candidate is really saying often leads to a misinterpretation of the discussion. Avoid the trap of hearing what you want to hear. Keep formal notes to accurately record what is said during interviews. Make sure your job requirements and performance expectations are clear. Be prepared for interviews to get what you need out of them.

### *I'll know it When I See It*

No systematic, well-thought out hiring process has been developed and the employer uses highly subjective methods to decide. The belief is that particular skill sets, or personality traits will emerge in some “A-ha” type epiphany during the interview process and that applicant will be viewed as the right person for the job. This is usually attributed to a poor hiring system, overconfidence, and shortcuts in the hiring process.

Use any of these inappropriate methods to make a hiring decision and you risk not choosing the right person for the job. Avoid these mistakes by developing a system – comprehensive, effective, and professional. And stick to it. A carefully designed and implemented hiring plan provides an effective means for attracting and selecting the best available candidate for a job.



*Notes:*

[illegible]

## Seven Hiring Tips

### *Develop a Hiring Game Plan*

Define the job and the selection criteria. Why are you hiring? Are there other ways to get the work done without adding staff? Is the workload temporary or permanent? What is the position profile? What is the job description? What are the selection criteria? What are the sources for potential candidates? Who is responsible for the hiring decision? How will the new employee be absorbed into the workforce?

### *Determine the Output*

The hiring system must be designed to select people who meet the requirements for the job and the culture of the organization. In other words, every bit as important as the technical proficiency to do the job is the personal style or energy to get along with coworkers and managers. Carefully review the candidate's personal attributes. You should hire for attitude and train for skills, not the reverse.

### *Define the Job*

Carefully establish the technical requirements of the job, behavioral requirements, and performance expectations. Once defined in detail, these three areas provide a guide for evaluating every candidate. This should include a position profile (the mission, performance standards, specifications, and conditions of the job) as well as the job description (the detailed list of tasks to be performed).



### *Know When to Hire*

Develop a hiring needs analysis that will determine when you need to hire a new employee. Why do we need another worker? What will happen if no one gets hired? What are the costs and benefits of hiring now? How else can the work be done? What will happen if the work is not done?

### *Develop a Recruiting Plan*

How do you attract good people to your organization and make them aware of the opening? What are the selling features of the job?

*Notes:*

[illegible]

## *Collect the Application*

Although it is the function of the human resources department in most companies to do the dirty work of gathering resumes, you want to ensure that you get to look at all the qualified candidates. Go ahead and let HR weed out those that definitely do not hit the mark. But you need to look at the rest to see if anyone rings your chime or if your recruiting message is playing effectively. Also, make sure all candidates have easy access to informed people within your organization to get prompt and accurate answers. You will also want to collect as much of the paperwork as possible in person (to give you another way of getting a better read on the candidate). Treat all candidates like customers so they receive a positive impression of quality and professionalism within your organization.

## *Screen the Candidates*

After the application is received, it should be reviewed to determine whether the candidate meets the minimum standards established for the position. Again, the HR department generally takes the lead on this, but you need to put your personal stamp on the process. Make sure the best candidates are coming out. If none emerge, do not lower your standards—look harder. If a candidate does not survive the cut, let them know politely and immediately.



## *Interview and Interview Some More*

After the cursory background checks, you want to talk in-depth to assess the behavior, attitude, and general character of the candidate. Go through a standard set of questions, but do not be afraid to ask unconventional questions to elicit a more profound understanding of how the candidate thinks. Such questions could include: “What’s your favorite Elvis song?” “Who are your heroes?” “What books are you reading?” You will be surprised at what the answers to these

questions will tell you about a person. Take them to lunch and assess how they interact socially. Also, put them in situations they may encounter on the job and see how they handle the stress. For instance, for a customer relations position, at the end of the interview you might say something like, “Well, thanks for your time. That just about wraps it up, but we’ve just received a phone call from an upset customer complaining about our service and I’d like to tape record your response.” It is not important what the candidate says but rather how they handle the stress and their ability to communicate. Also, the interview process should be conducted over several days and with different levels of people within the organization (most importantly, the head honcho) to get a full and complete picture of the candidate.



*Notes:*

[illegible]

## Phone Interview

As you move through the candidate screening process, your goal is to gather as much useful data as possible. And, you need to reduce the number applicants to a manageable number. The final step in a good screening process is to conduct a phone interview. This short conversation is your first opportunity to ask questions. The responses let you decide whether to continue to the face to face interview. Here are ten tips to help you conduct better phone interviews:



### *Complete Before the Decision to Interview*

Conduct your phone interview before you schedule the face to face interview. During the phone interview you will decide whether to pursue the candidate.

### *Prepare Your Questions In Advance*

Prepare 4-6 effective phone interview questions in advance. Do not try to make it up as you go along. Each question should be designed to get you a specific piece of data related to one of your critical job requirements.

### *Explain Your Purpose*

Tell the person why you are calling, where you are in the process and what you hope to accomplish. In a couple of sentences, you can establish rapport and set expectations.

### *Ask Your Questions in Order*

Ask your prepared phone interview questions in the order you created them. Try to create your questions in a logical order either chronological or grouped by requirement.

### *Take Notes*

Take notes during the conversation. You can record your notes on the same piece of paper you wrote your questions. Just get enough information so you can recreate the conversation if necessary.

[illegible]

### *Probe for More Information*

Be certain to follow up on your original questions. Probe for more information, dig a little deeper. The more information you get, the better decision you will make.

### *Discuss Special Issues*

This is an opportunity to discuss any special issues like travel, transportation or even salary. Any issue that is a checklist item (like the ability to travel, working weekends, or having transportation) can be discussed during this screen. Of course, you only want to go into this detail with the candidates you have chosen to pursue.

### *Schedule the Interview*

For those people you choose to pursue, this is a good opportunity to schedule them in for a face to face interview. It saves time and effort when you already have the person on the phone.



### *End on A Friendly Note*

Regardless of the outcome, you want to treat everyone with total respect. It is a reflection on you and your company. Treat all candidates in a friendly manner.

### *Follow Up*

Make a habit of following up with each person. If you have scheduled an interview, send a confirming letter or email. If you have not scheduled an interview, send the person a thank you note letting them know you will not be pursuing them. This is more than common courtesy. It helps to build the reputation of your company.

***These phone Interview tips go a long way to ensuring you spend your time with the best candidates.***

*Notes:*

[illegible]

## Phone Interview Questions

Good phone interview questions help you get the information you need to screen candidates and decide if you want to pursue the person. Asking the right questions allows you to accomplish a lot in a short period of time.

Before any candidate is scheduled for an in-person interview, there should be a phone interview. Conducting a successful phone interview is asking effective questions and can save a lot of time and hardship for both you and the candidate.

Effective questions all have the following characteristics:

- ✚ Based on a critical job requirement
- ✚ Designed to get to a specific piece of information (specific not general)
- ✚ Force the candidate to tell you *“what they did”* (describes behavior)
- ✚ Is not theoretical



### *Based on a Critical Job Requirement*

Your question should be based on the critical job requirements. Do not ask a question unless it gets very specific data related to one of your requirements. *“What do you say when a patient complains that he/she was told their insurance paid 100% and can’t understand why there is an outstanding balance?”* This question goes right to the heart of how a person solves patient problems. The answer tells you exactly what the person did in a situation like the one they will face on the job. You will not get specific information when you ask a general question like, *“How do you solve patient’s problems?”*

*Notes:*

[illegible]

### ***Design to Gain Specific Information***

Stay away from general questions and try to make all your phone interview questions specific. Be sure to ask questions that force the person to tell you something specific they did. *“What do you do and say when a patient presents themselves to you stating they have an emergency and need to see a doctor right away?”* The person now must answer by telling you what they said. There is not room for generalizations.

### ***Force the Candidate to Tell You What They Did***

When creating your questions, remember one question can in case one or more characteristics. *“What do you do when a patient presents themselves to you stating they have an emergency and need to see a doctor right away?”* The answer makes it easy to determine if the behavior will be successful in your practice as well as gaining specific information.

### ***Non-Theoretical***

Finally, make sure your questions are not theoretical. You are not interested in what they think about a subject. You want to know what they did. The easiest way to keep your questions non-theoretical is to make certain they are in the past tense. Instead of *“what would you do”* ask *“what did you do”*. Keeping your questions in the past tense keeps the answer factual instead of based on theory.

### **Sample Phone Interview Questions**

#### ***Assistant***

1. How did you handle a patient that expressed they feel claustrophobic with the rubber dam you just placed?
2. What was your role at your last practice?
3. How did you learn to use your last dental practice management software (Dentrix)?
4. During an endo when and why would you leave the operator?
5. What steps did you take when prioritizing patient flow (example: patients in chair and waiting area clean and dirty operator)?
6. How do you explain a bridge to a patient?
7. What information do you present to your doctor prior to bringing him chair side?



#### ***Administration***

1. How did you handle a patient that felt they were not responsible for their bill, because of an incorrect estimate?
2. What was your role in your last practice?
3. How did you learn to use your last dental practice management software (Dentrix)?
4. What did you say when a patient refused to pay their invoice because they felt the Dr. was responsible for their failed endo?
5. What did you say when a patient called to cancel their appointment, with only an hour's notice?
6. How did you explain an endo to a patient?
7. What did you say to a patient when their doctor was running 20 minutes behind?



*Notes:*

[illegible]

## Conducting an Interview

In my years of management, I have done hundreds of interviews. I have also written a few courses on interviewing. During my research one common thread I have found is that interviews take a long time; time most of us do not have. On page 39 we talked about all the issues that arise by hiring the wrong person, so let's review some steps and questions that will help us hire the right person for the job. When you have reached this phase of the interview process, we should be meeting with qualified candidates (quantified resume, phone interview).

### Set a Friendly Tone

We do not want the interviewee to be uncomfortable and excommunicative. Set your candidate at ease; choose a comfortable quiet setting for your interviews. I always start my interviews by thanking the candidate for the opportunity to meet with them- *"Thanks for meeting with me today; I always consider it an honor when someone allows me to interview them."* This has proven to be a great opener; I can see the candidate's shoulders loosen up. Offer a sincere compliment about a strong point on their resume. Here are a few more tips that will set a friendly tone:



- + Choose a quiet setting
- + Ask your support team to hold your calls
- + Offer candidate a glass of water (no ice)
- + Ensure candidate has appropriate seating (not too low or high)
- + Do not seat candidate in front of a bright light or in direct sunlight
- + Keep candidate out of air conditioning and drafts
- + Do not allow interruptions (team members asking quick questions)
- + Offer candidate a sincere smile and extend a handshake

### Establish Control of the Meeting

Let us be honest you've initiated this meeting and it's natural for the candidate to expect you to chair it. Frederick Hornberger states the first step is to lead smoothly from small talk into the interview. Briefly describe your role in the company as well as the position (title only) for which the candidate is being interviewed. Give the candidate a summary of what is to be accomplished during this meeting. Frederick Hornberger suggests a possible conversation could be *"We have a unique and attractive opportunity for the right individual. I would like to spend the first part of our meeting discussing your background and I'll share some information about the position with you and then give you a chance to ask questions. This is just an initial meeting for us to get acquainted and should take about twenty minutes."* In Frederick Hornberger's approach he has left his options open. Now you can either extend the interview as necessary or your schedule can be adhered to without making the candidate feel they have been cut short. Have you noticed we have not offered the candidate a description of the position? Our reasoning is elementary; most candidates will slant their responses to make themselves appear ideally suited. What we are trying to acquire during this meeting is unbiased information.

*Notes:*

[illegible]

## Interview Questions

Before the appointment was booked, the candidate's qualifications were determined. Our task during the interview is to determine the fit. *"Will this candidate fit into our culture?"* Notice our questions are designed to gather actual experience rather than theory. This is the longest segment of the interview process, but let us tries to keep it at about 10 minutes.

1. Please describe your present job responsibilities.
  - a) Which are most difficult?
  - b) Which are the most enjoyable?
2. What accomplishment in your present job are you most proud of?
  - a) What was your best idea (regardless of implementation)?
3. What would you like to have accomplished, but haven't, in your present job?
  - a) What prevented you from doing so?
4. What strengths and weaknesses would you bring to this position?
5. What do you know about our company?
  - a) What do you know about this particular position?
  - b) What would it take to succeed in this position?
6. What elements are important to your job satisfaction?
7. Describe what qualities would make an ideal boss for this position?
8. What are your short- and long-term career objectives?
9. What are the biggest frustrations in your career?
10. What might your present practice and department do to become more successful?
11. What are your hobbies and interests?
12. How do you describe your personality?
  - a) How would your peers describe you?
  - b) How would your present boss describe you?
13. What separates you from the other candidates that have applied for this position (why should I hire you)?



*Notes:*

[illegible]

## Sell the Position

It is simple, entice the superior candidate to want the job. Explain to the candidate how you feel about the job. *“We feel we have an outstanding opportunity and I’m excited about it. Whoever assumes this responsibility will be important to our overall success. That’s why we’re determined to hire the right candidate.”* Describe the job opportunity in general terms. Again, avoid biasing the candidate’s answers in subsequent interviews. It is wise to work from the written job description during this phase of the interview. Although you will choose what to reveal in each case, you will also want all the facts at your disposal. Do not oversell or exaggerate the opportunity. False expectations are a major cause of employee turnover.



## Answers Questions and Close

In this final step, the candidate has the opportunity to ask questions about the prospective job. An aggressive candidate will try to assume control throughout the interview, so do not allow that to happen. Reduce the candidate's questions to a minimum by saving them for the end. Furthermore, many questions will have been answered during the flow of the interview. Once the question period begins, however, let the candidate know that this is his or her opportunity. By now, you have a good sense as to whether the candidate should be invited back for subsequent interviews. Accordingly, you can extend the interview or keep it brief at this time. If the candidate asks sensitive questions or makes inquiries about matters you do not want to discuss yet, such as compensation or hiring dates, explain that these subjects will be covered during subsequent interviews. Close all interviews on a positive note. Thank the candidate for their time and interest and let them know what to expect next. Where applicable I ask the candidate if they would be willing to have a working interview with the prospective team. Summarize your notes immediately after the meeting while the details are fresh in your mind.

*Notes:*

[illegible]

## How to Create a Training Plan

1. What you want to train

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2. Who will train

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3. Training environment

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4. Where will you train

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5. Training data base

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6. How long will training last

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*Notes:*

[illegible]

## Progressive Management

No one wants to hear that their performance is less than expected. If counseling and coaching from a manager yield no improvement, however, written disciplinary action must begin - to protect the company's interests - and to protect the interests of the employee. Employees are uncomfortable with disciplinary action such as an employee reprimand. They are uncomfortable when their manager tells them that their performance warrants a verbal warning, the final step before written disciplinary action begins. Managers wonder why employees don't just improve their performance as the severity of the disciplinary action progresses. An effective, communicative disciplinary action process should keep the employee informed and accountable every step of the way.

Many managers dislike the disciplinary portion of their job more than anything else. In fact, in studies, managers rank firing an employee at the top of the list of actions in which they most hate to play a part. Managers would rather spend their time on activities such as setting goals, reviewing progress, and eliminating problems employees experience as they strive to complete their work.

## Purpose and Progress in Disciplinary Actions

From a company perspective, an employee reprimand demonstrates that the company was working with the employee to help him or her improve. At the same time, the company documented its increasing unhappiness with the employee's performance. The written employee reprimand shows that the employee was also informed of the performance problems and their consequence if they remained uncorrected. Following the letter of reprimand, depending on the company's disciplinary action policies, additional steps can include subsequent letters of reprimand with accompanying penalties such as days off from work.

If the supervisor has faith that the employee can improve his or her performance, at any time during the disciplinary action proceedings and preferably before the first letter of reprimand, the supervisor can introduce a performance improvement plan (PIP). The PIP is a more formal, detailed document with goals, expectations, and timelines. This is the manager's opportunity to communicate clear job and performance expectations to the non-performing employee.

Disciplinary action, such as an employee reprimand, can be a win-win if the employee heeds the message. If the employee does not, the company and the manager have effectively protected their interests - and the interests of employees who are performing satisfactorily. The goal is to prevent a negative impact on performing employees whose morale is affected by the employee who is not doing his or her job.

*Notes:*

[illegible]

## Progressive Management steps

### 1. Verbal Warning

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### 2. Verbal Written Warning

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### 3. Written May Memo

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### 4. Written Will Memo

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*Notes:*

[illegible]

## Components of May & Will Memos

- ✦ Clear statement of the problem or the performance issue that the employee must improve.
- ✦ The reprimand letter might enumerate several examples of ways in which the employee can change performance to comply with performance expectations. (This provides the employee with a shared picture or shared meaning around the supervisor's expectations.)
- ✦ The impact of the non-performance on the employee's and the organization's success. (How the failure to perform is impacting the workplace.)
- ✦ If relevant, a timeline within which the employee's performance must improve.
- ✦ If relevant, a due date or end date at which time, the performance will be re-evaluated.
- ✦ A clear statement about the consequences an employee can expect if performance fails to improve as described.
- ✦ The signature of the supervisor or the manager of the employee.
- ✦ The signature of the employee whose performance is the focus of the reprimand letter. The letter generally contains a statement that the employee signature represents receipt of the letter, not necessarily agreement with its contents.
- ✦ An opportunity for the employee to object, in writing, to the contents of the reprimand letter. The employee may agree, disagree, express contrition, and so forth. Rebuttals are attached to the original letters of reprimand.






Bad news, delivered badly.

*Notes:*

[illegible]

## Having a Follow-up Conversation

Once action has been determined, have a follow-up meeting. It may include:

-  Conversation
-  Performance Improvement Plan
-  Formal Documentation

Always document the follow-up conversation.

### Follow-up Conversation Checklist

- ☐ Remind the employee of recent incidents and particulars/reasons
- ☐ Include employee's side
- ☐ Describe your expectations going forward
- ☐ Discuss how behavior will change
- ☐ May include formal documentation that the employee signs

## Performance Improvement Plan

Performance Improvement Plan

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Follow up meeting date: \_\_\_\_\_ (to be scheduled in advance) \_\_\_\_\_

Improvement Objective	Action Steps	Resources/ Support Required	Measuring Success	Completion Date
Include what is to be accomplished.	Actionable steps planned to help reach the objective.	Indicate any additional resources or support needed to help achieve the improvement objective.	What is the required level of performance and how will it be measured?	When will we review progress?

Employee Signature: \_\_\_\_\_ Manager Signature: \_\_\_\_\_

Date: \_\_\_\_\_



## Suspension:

There are a couple of reasons we may want to suspend an employee.

### Suspension with Progressive Management

- I. Employee has ignored previous opportunities to improve (Verbal and Written Verbal warnings, May, and Will Memos). A suspension should be utilized to give both the employer and employee time to review their business relationship. During the suspension, the employee is asked to create a performance action plan that they must present upon their return (see page 99). During the employee's suspension employer must take time to reflect on the employee and the events that have led you to the suspension.

#### Steps:

1. Meet with employee and review your concern and inform employee that you are sending them home (with-pay).
2. Assign employee their task (Create an Action Plan)
3. Book a meeting (during employee's regular work schedule) to meet with employee on their return.
4. Meet and review employees Action Plan, come to an agreement

If your decision is to terminate employee, do so in this meeting (regardless of the day of the week).

### Suspension with Cause

- II. If you are required to investigate an employee's action, and if true, and the action is departmental to your business then in this situation the typical warnings (Verbal and Written Verbal warnings, May and Will Memos) may not be required.

#### Steps

1. Meet with employee and review your concern and inform employee that you are sending them home (with-pay).
2. Inform employee that if the investigation proves true, they will not be compensated during the investigation.
3. Inform employee you will contact them to meet with you at the completion of the investigation.

Upon completion of your investigation it may be necessary to terminate the employee.

#### Steps:

1. Invite employee to a meeting
2. Follow termination steps (see page 105)

Remember there must be two members of your management team present during all process of a suspension.

*Notes:*

[illegible]

## Termination

In management we are sometimes asked to invite someone into our family and other times we facilitate their departure. Terminating an employee is never easy. Whether it is the first time or the 50th, every case is difficult, emotional and stressful. But no matter how difficult it is for you, it is obviously more difficult for the individual losing their job. Loss of employment is high on the list of tragedies in a person's life that results in extremely high levels of stress. With stakes so high, it is critical - no, it is an obligation - that the supervisor ensures the termination be done with a high degree of professionalism, and most importantly, with as high a degree of compassion as possible.

1. Never terminate a business relationship alone
2. Terminations should be conducted midweek and the beginning of a shift (Pay employee for the full shift)
3. Speak directly to the point (not a lot of details)
4. Provide a letter of termination (see page 113)
5. Escort employee to the door
6. Do not engage in confrontational dialog
7. Termination should take less than 5 minutes



## Top 5 Stressful Situations

1. Death of a loved one
2. Divorce
3. Moving
4. Major Illness
5. Job Loss

*Notes:*

[illegible]

## Steps in a Termination

### Preparations

- Create your termination letter in advance, take time read and reread the letter to ensure accuracy.
- Practice your verbiage
- Clear out the terminated employees work area (with an appropriate witness) prior to any of your employees beginning their work shift. Be sure to gather all their personal belongings.

### Where to perform Terminations

- Terminations should be held in a private room, with easy access to the exit the building. The ideal locations allow the terminated employee to exit your premises with minimal contact to your patients and employees.
- The area should have room for three chairs (the employee, the witness, and the manager).

### Inviting the Employee to Their Termination

- Terminated employee should be met at the door by the witness. “Hello Mr. Never Catches On” Mr. Schwarzenegger would like to meet with you in his office.
- Walk with employee to office. Although this walk will feel awkward try to avoid small talk and never yell out words like “Dead Man Walking”.
- Never inform the terminated employee what the meeting is about, your reply should be Mr. Schwarzenegger has all the details (be warm).



*Notes:*

[illegible]

## What and When to Speak

- Invite employee to have a seat. Employee should have the seat closet to the door.
- Begin speaking as soon as the terminated employee is seated.
- Speak slowly and clearly.

*Hello Mr. Never Catches On:*

*We have decided to terminate our business relationship. On June 15<sup>th</sup> we reviewed your lack of adherence to our break schedule. We discussed that this has been an ongoing issue with 15 previous infractions. During our conversation we told you that if it happened again it would lead to further disciplinary action including termination. Yesterday you did not adhere to your break schedule, so as discussed, we are ending our business relationship effective immediately. Here is a letter (hand letter) with the details regarding your payroll benefits etc. We will be paying for today. Carol and I have gathered your personal belongings we wanted to make things as comfortable as possible. We need your key and all company property (when applicable) Please review and contact me (when applicable) at the number provided if you have any further questions*

*Good luck in your future*

## The Exit

Stand and politely motion for Mr. Never Catches On to exit. If they offer their hand to shake, shake it gently. Ensure the terminated employee is ok to drive. Provide Taxi Chit if necessary.



*Notes:*

[illegible]



## Frequently Asked Questions.

**Question:** What if the employee starts to beg for their job?

**Answer:** Calmly state this decision has been made and is final.

**Question:** What if the employee starts to cry?

**Answer:** Offer the employee a Kleenex and continue with the process (don't be distracted).

**Question:** What if the employee starts to yell?

**Answer:** Stay calm and tell the employee that they are making you uncomfortable, they need to remain professional.

**Question:** Where should everyone sit.

**Answer:** The manager should sit facing the employee and the witness. The Employee should be closest to the door.



**Question:** Does the witness speak during the meeting.

**Answer:** No, they take notes.

**Question:** What if the employee asks to get other personal items from their desk.

**Answer:** This is a judgement call; you may offer to gather the items for them or have them come back after business hours to pick the items up.

**Question:** Who should be the witness?

**Answer:** Somebody of authority (privacy is essential). **Never** have two males terminate a female employee.

**Question:** What if the employee starts asking you a bunch of question.

**Answer:** Refer them to the letter, tell them to read the letter at home and there is a phone number for them to call if they have any questions.

**Remember:** No employee should be surprised when they are terminated. The discussions and signed documentation (should have) happened prior to this meeting. This entire process should take less than 5 minutes.

*Notes:*

[illegible]

## Meeting Etiquette

### **Be on Time.**

Make sure you come on time and prepared for the meeting.

### **Make introductions.**

You will need to make introductions if not everyone knows each other. You should do this by starting with the person of the highest rank first.

### **Have an agenda.**

You should have a good, strong agenda so that you can stay on track if you do get off track, you should have a facilitator to get you back on track.

### **Sit appropriately.**

Make sure you adjust your chair so that it is at equal height with everyone else at the table.

### **Speak up.**

You need to speak loud enough so that everyone hears what you are saying.

### **Understand the unwritten speaking rules.**

Do not interrupt others, but in some meetings, you must interrupt at some point, or you will not be heard. Understand the rules so that you can have a productive meeting.

### **You can drink coffee/tea & water but do not bring food.**

Unless it is a breakfast, lunch or dinner meeting do not bring food. Food can give off smells and you can make noise that is disruptive.

### **Clean up after yourself.**

You need to clean up after yourself and leave things the way you found them.

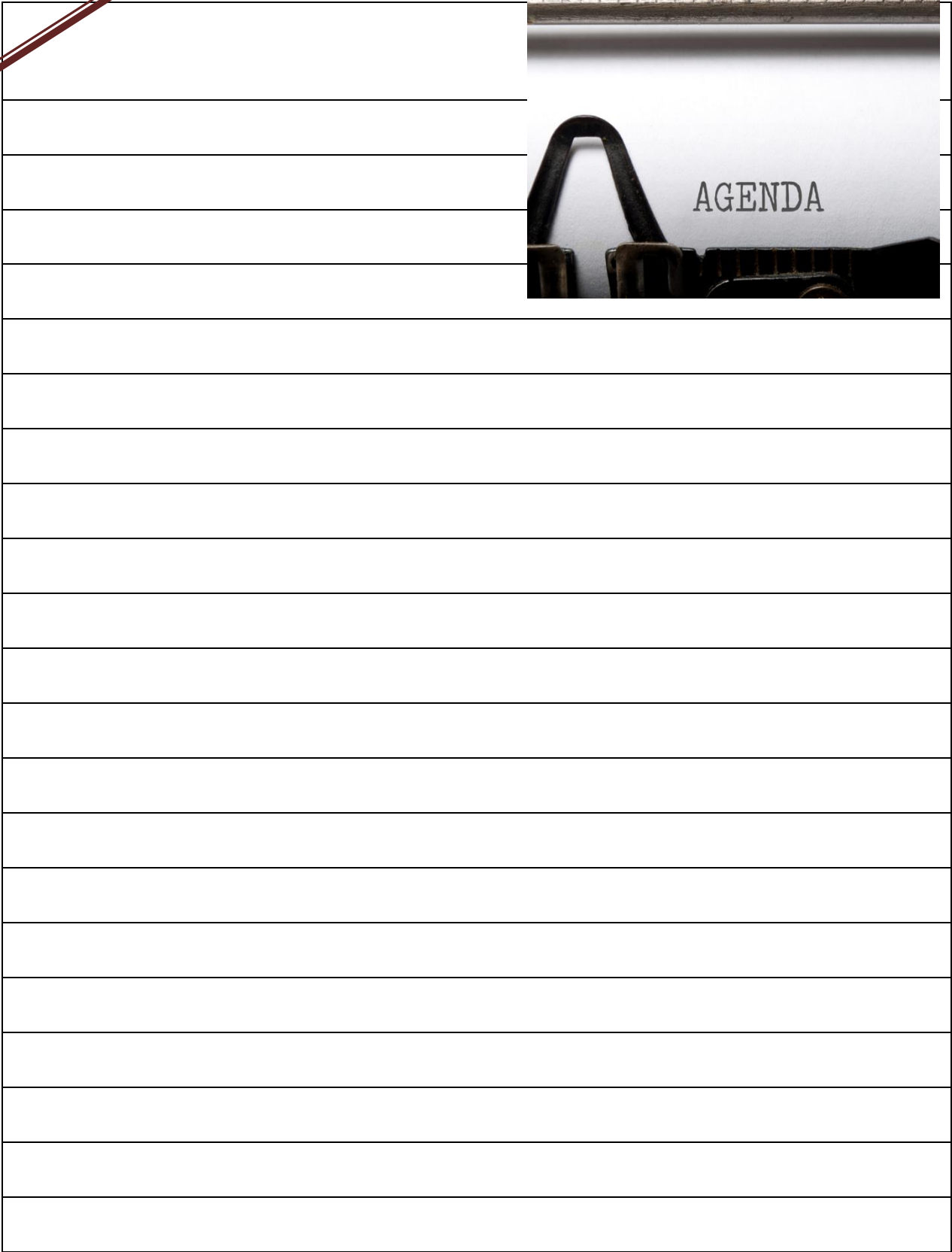
### **Do not have your phone out.**

Do not keep your cell phone on the table during meetings. Even if you are not looking at your phone, it can get distracting if it starts making noises or lights up with an incoming text or email. Keep your phone in your pocket and on silent. Do not answer texts or emails.

### **Do not save all your questions for the end.**

Ask your questions at the appropriate time. Do not leave all your questions till the end when everyone is getting ready to go.

*Notes:*



## Meeting Agenda Template

### Meeting header


*The meeting header contains general meeting information*

- ✚ Meeting date
- ✚ Meeting start time
- ✚ Meeting end time
- ✚ Meeting location
- ✚ Meeting purpose
- ✚ List of participants (including guests)
- ✚ List of meeting reference documents (if applicable)

### Agenda items

*For each item list the following:*

- ✚ Title or topic
- ✚ Short description of the topic
- ✚ Person responsible for the item (lead)
- ✚ Time allotted
- ✚ List of reference documents related to the item (if applicable)



*Notes:*

[illegible]

## Meeting Minutes

Proper recording of your meeting minutes is important. They capture the essential information of a meeting, decisions and assigned tasks. They keep attendees on track by reminding them of their role in a project and clearly define each attendee's task take away.

Meeting minutes should not be an exact recording of everything that happened during the meeting. They are meant to record basic information such as the actions assigned, and decisions made.



## Meeting Minutes

### *Who is Responsible for Taking the Minutes?*

Assign a staff member to become your meeting facilitator. This person should not be a major participant in the meeting. He/she should create a template for recording the meeting minutes and make sure you leave some blank space to record your notes. The following information should be included:

- ✚ Date & time of the meeting
- ✚ The purpose of the meeting
- ✚ The meeting lead or chair's name
- ✚ Assigned action items
- ✚ Decisions made
- ✚ Names of attendees at the meeting

*Notes:*

[illegible]



## *Tips for Note taking*



The following tips are from the International Association of Administrative Professionals (IAAP):

✚ Do not try to record notes verbatim – it is not necessary. Minutes are meant to give an outline of what happened in the meeting, not a record of who said what.

✚ Number the pages as you go so you are not confused later. The minute-taker is responsible for providing good flow.

Do not force yourself to write the minutes in the actual chronological order of the discussion – it may not work.

✚ Focus on action items, not discussion. The purpose of minutes is to define decisions made and to record what actions are to be taken, by whom and when.

✚ Be objective. Write in the same tense throughout and avoid using people's names except for motions or seconds. This is a business document not about who said what.

✚ Avoid inflammatory or personal observations. The fewer adjective or adverbs you use, the better. Dull writing is the key to appropriate minutes.

✚ If you need to refer to other documents, attach them in an appendix or indicate where they may be found. Do not rewrite their intent or try to summarize them

*Notes:*

[illegible]

## Performance Evaluation Form

Name:	Position:
Supervisor / Appraiser:	Department / Location:
Review Period:	Date of Review:

### Section 1 - Specific Responsibilities in the last year

<b>Responsibility</b>		*Weight can be identified in order of priority or it can be identified as a percentage
		Weight
<b>Accomplishments</b>		
<b>Supervisor Comments</b>		*See Section 2 for Rating Scale
		Rating
<b>Responsibility</b>		*Weight can be identified in order of priority or it can be identified as a percentage
		Weight
<b>Accomplishments</b>		

<b>Supervisor Comments</b>		<i>*See Section 2 for Rating Scale</i>
		Rating
<b>Responsibility</b>		<i>*Weight can be identified in order of priority or it can be identified as a percentage</i>
		Weight
<b>Accomplishments</b>		
<b>Supervisor Comments</b>		<i>*See Section 2 for Rating Scale</i>
		Rating
<b>Responsibility</b>		<i>*Weight can be identified in order of priority or it can be identified as a percentage</i>
		Weight
<b>Accomplishments</b>		

<b>Supervisor Comments</b>	<small>*See Section 2 for Rating Scale</small>
	Rating

\*Copy & paste table if more are required

<b>Additional employee comments regarding this past work year (i.e. career development, personal performance, additional accomplishments)</b>

## Section 2 - JOB COMPETENCIES *(To be completed by Supervisor)*

### Performance Rating Scale

- |                                 |  |
|---------------------------------|--|
| 1 = Unsatisfactory Performance: | The overall performance is currently unsatisfactory. Performance improvements previously identified. |
| 2 = Needs Improvement:          | Performance requires improvement for critical/important responsibilities.                            |
| 3 = Meets Expectations:         | Performance meets or exceeds expectations for most or all critical/important responsibilities.       |
| 4 = Exceeds Expectations:       | Performance consistently exceeds expectations for most or all critical/important responsibilities.   |
| 5 = Exceptional Performance:    | Performance is exceptional for most or all critical/important responsibilities.                      |
| N/A =                           | Not Applicable   |

Factors to appraise / Rate only those applicable to position	Performance				
	1	2	3	4	5
<b>1. Job Knowledge:</b> The degree that the employee knows and understands components of the job. The level of practical, technical, or professional skill used in his/her job.  Comments:					
<b>2. Productivity:</b> Degree to which realistic job duties and objectives are accomplished, consider effective use of time, materials, money and people.  Comments:					
<b>3. Planning and Organization:</b> Degree to which realistic goals are set and resources are organized to achieve them. Plans and organizes routine work plus long-term projects.  Comments:					
<b>4. Judgment and Decision Making</b> Soundness and timeliness of judgments used in assignments  Comments:					
<b>5. Communication and Written Skills</b> Ability to communicate at all levels in a clear and timely manner.  Comments:					
<b>6. Delegation</b> Ability to optimize productivity by distributing tasks within the organization  Comments:					

<b>7. Policies and Practices</b> Has employee demonstrated effective implementation of policies, work rules and safe work practices?  Comments:					

<b>SECTION 3 - PERFORMANCE REVIEW</b>	<b>Performance</b>				
<b>Overall Performance Appraisal Rating:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>

<b>Supervisor/Appraiser Comments</b>

<b>Development Plan*</b>  <i>*Attach agreed upon updated Role Profile. Additional recommendations may be outlined here.</i>

<b>Employee Comments</b>

**Approvals and acknowledgements that the performance appraisal form has been reviewed and the Role Profile/positions description has been received.**

Employee \_\_\_\_\_  
*Signature* *Date*

Supervisor/Appraiser \_\_\_\_\_

## Staff Evaluation

Team Members Name: \_\_\_\_\_

Doctors Name: \_\_\_\_\_

How Long (with you) \_\_\_\_\_

Rate your team member from 1 to 5 [with 5 being 'exceeds expectations'].

1. How well does your team member build strong relationships with **each** patient? \_\_\_\_\_
2. How well do they communicate with patients? \_\_\_\_\_
3. When you enter the operatory do you have everything you require? \_\_\_\_\_
4. Do they reinforce your treatment plans (with patients)? \_\_\_\_\_
5. How well do patients respond to them? \_\_\_\_\_
6. Rate their quality of work. \_\_\_\_\_
7. Rate their ability to work well under pressure (when we get busy). \_\_\_\_\_
8. How likely are they to work past their scheduled shift to accommodate an emergency? \_\_\_\_\_
9. Rate their response when patients are added to your schedule. \_\_\_\_\_
10. How well do they utilize their free time (Important but not urgent tasks)? \_\_\_\_\_
11. How effective are they on time management (do they waste time)? \_\_\_\_\_
12. How do they get along with other team members? \_\_\_\_\_
13. Do they avoid gossip (complaining to the wrong people)? \_\_\_\_\_
14. How well do they set a good and positive attitude? \_\_\_\_\_
15. How well do they demonstrate "Friends Helping Friends"? \_\_\_\_\_



- Total score out of 105 \_\_\_\_\_

[illegible]

