Jane's Handbook for **Hiring, Onboarding, and Training Your Front Desk Staff**

For more hiring, onboarding, and training tips, scan this QR code or visit jane.app/blog

The Master Checklist

We've put together a Master Checklist to help keep you on track and feeling organized during this process.

Hiring

- ❏ Role assessment
- ❏ Job posting
- ❏ Screen #1: Review resume and cover letter
- ❏ Screen #2: Phone interview
- ❏ Interview #1: Skills and abilities
- ❏ Interview #2: Company fit
- ❏ References and criminal record check (if applicable)
- ❏ Extend formal offer
- ❏ Contract signing
- ❏ Establish a start date and onboarding/training schedule

Onboarding

- ❏ Create an onboarding plan and schedule
- ❏ Schedule time/meetings with key players
- ❏ Let coworkers know when to expect them
- ❏ Prepare their workspace
- ❏ Prep their tech: log-ins, passwords, phone numbers, emails, etc.
- ❏ Gather any resources you may want them to review

Training

- ❏ Create a training plan and schedule
- ❏ Gather resources (ex. Jane's Front Desk Training!)
- ❏ Schedule time with current employees for training/shadowing as needed
- ❏ Create a plan to monitor progress and evaluate the success of training

Role Assessment & Job Posting

There are two things you need to establish before you begin the hiring process:

- ❑ What do you need the person in this role to do for you?
- ❑ What can you offer the person in this role?

Bonus: once you've filled out this worksheet, you can use it to create your job posting!

The Job

What will their day-to-day duties be?

Get super specific! Have someone who's doing the job keep a log or walk through what you think a day might look like.

- ____
- ____
- ____
- ____
- ____
- ____

What will their overarching responsibilities be?

Are there long-term projects or goals with this role? Will there be things they need to do monthly/yearly?

- ____
- ____
- ____
- ____
- ____
- ____

Logistics

Who will they report to and who will report to them?

- They report to: ____________________
- They have _____ direct reports:

  1. ______________________________
  2. ______________________________

What will their days/hours of work be?

Are these flexible or rigid?

- ______________________________
- ______________________________

Wish List

Experience (required/preferred):

- ______________________________
- ______________________________
- ______________________________
- ______________________________

Credentials (required/preferred):

- ______________________________
- ______________________________
- ______________________________
- ______________________________

Skills and abilities (required/preferred):

- ______________________________
- ______________________________
- ______________________________
- ______________________________

Why work with US

Compensation

Will they be paid hourly or on salary? Can they earn overtime or bonuses? What type of compensation model will you use?

- ______________________________
- ______________________________
- ______________________________

Time-off & Benefits

Will there be paid sick time or vacation? How much? Can you offer health benefits or other perks?

- ______________________________
- ______________________________
- ______________________________

Work environment/culture

Is there opportunity for growth in this role? Who are you as a company and why should they come work for you? What are your values/mission?

- ____
- ____
- ____

Once your Job Posting is ready...

What are you going to do with it?

If you want to cast a wide net, try posting on popular job boards like:

- [ ] LinkedIn
- [ ] Indeed

If you want a new grad or someone with specific education:

- [ ] Try your local college or university job boards

If you want someone local or known to the business:

- [ ] Try starting a referral program where current employees can recommend people they think would be a good fit!

Screening Call Questions

The point of this call is to get a sense of if this person has potential in the role before you invest any more time and energy into them as a candidate. Are there non-negotiables for this role? Now is the time to ask about them!

These questions are only suggestions: feel free to pick and choose, add your own, or throw ‘em out altogether!

- ❑ What made you apply for this role?
- ❑ Do you have any experience with our company/business?
- ❑ Do you have any experience with our client-base?
- ❑ What do you feel would make you a good fit for this role?
- ❑ What kind of experience do you have working in a role like this?
- ❑ Are you able to work the posted days/hours?
- ❑ Have you seen the proposed compensation model? Will this work for you?
- ❑ How do you like to learn?
- ❑ Do you work better individually or in a team?
- ❑ Do you have any questions about the role or the company?
- ❑ What do you need from a company/workplace to be successful in your role?

Interview Categories

Every role and business will require specific questions, but here is a general outline of the things you could be asking your potential hires about.

Adapt these to your own unique needs to assess if a candidate will excel and be satisfied in the role they are interviewing for:

- ❑ **Introduce yourself and your business**

  An interview isn't all about you seeing if the candidate is right for the job. They need to see if your business and the job are right for them, too!

- ❑ **Why us?**

  Get a sense of why they want to work with your business in that specific role.

- ❑ **Tell us about a time...**

  Find out what their previous experience is. Have they had to manage situations that they might encounter in the role they're interviewing for? If not, how might they approach them?

- ❑ **Teamwork and Independent Work**

  Which do they prefer? How do they excel in either of these areas?

- ❑ **Growth and Goals**

  How do they define success? Where do they want to be in ___ years? Do these things match up with the career trajectory of the role they're interviewing for?

- ❑ **Do you have any questions for us?**

  Hint: they should!

Onboarding Program Checklist

You can use this checklist as a guide to creating your own onboarding program. Every business and workspace will be different, so make sure you customize your onboarding to be as helpful as possible for your new hires.

- [ ] **Take a Tour**

Put them at ease by familiarizing them with the space and letting them know where they can find everything they might need: bathrooms, work stations, supplies, staff lockers, etc.

- [ ] **Tech Talk**

Get them set up with account log-ins (like, say, their Jane account!), show them how the phones work, introduce them to the programs/software they'll use be using. There's nothing worse than showing up on your first day and not knowing the basics!

- [ ] **Meet and Greet**

Introduce them to their coworkers, the clients/patients, and other clinic staff so everyone knows who they are and they feel at ease with the people around them.

- [ ] **Entry Interview**

Set meetings with their manager/direct reports/HR to review things like who to go to with questions, compensation, scheduling, role expectations, and general company policies.

- [ ] **Communication is Key**

Help them understand how you communicate as a company, what's expected, what your norms are, and what's frowned upon or not allowed.

- [ ] **Chit Chat**

Get to know them! What do they like, how do they work, coffee or tea, cats or dogs?

- [ ] **Story Time**

Talk about the history of the business, where you're headed, and what your mission/values/culture is all about.

Training Checklist

You can use this checklist to create your own training program that will work for your business's unique needs. For each section, gather resources that you can give your new hire to help them learn and refer back to as they get started in their new role.

Client-Specific Knowledge

- ❑ **Schedules**
  They'll need to know your hours of operation and who works when!
- ❑ **Services & products**
  Make sure they have access to product descriptions, rates, and know how you like to sell to your clients.
- ❑ **Contact info**
  Which phone numbers and emails should they be giving out for the clinic and different practitioners?

Role-Specific Responsibilities

- ❑ **Daily/weekly/monthly responsibilities**
  What do you need them to do on a daily basis? Are there any tasks that they're responsible for weekly or monthly? Write 'em down!
- ❑ **Duty Specific Training**
  If they're responsible for washing linens, make sure they know how the washing machine works. If they're responsible for locking up, make sure they know where the keys are kept and what your security system is like. You know what they say about assuming...

Tech Training

- ❑ **Jane training (obviously ☺)**
  Check out the Front Desk Training courses on jane.app!
- ❑ **Time and training resources to learn any other programs they'll need for their role**

Customer Service Training

- ❑ **How to speak to clients**
  Do you have dos and don'ts for how you answer the phone, reply to an email, or greet people when they walk through the door? Is there specific language that you avoid or ways that you try to be more inclusive or welcoming?
- ❑ **Navigating challenging interactions**
  Give your new hire a leg up by providing them with some tools for navigating challenges with your clients. What should they expect? When should they ask a manager to help?

Hiring, Onboarding, and Training

Sample Onboarding & Training Schedule

This will vary greatly based on your practice, the role you've hired for, and your training capacity. We hope this can give you some ideas for how you might structure your program.

One thing we suggest for all your trainees is **providing them with a detailed schedule of what they'll be learning, when and how they'll be learning it, and what your expectations are for each part of training**. People love to know what's expected of them so they don't have to wonder if they're doing a good job or falling behind.

You may need to refer back to the onboarding and training checklists if you're not sure what each category is referring to (ex. What the heck is Chit Chat?!)

Day 1 | 4 hours

- [ ] Take a Tour
- [ ] Meet & Greet
- [ ] Chit Chat
- [ ] Tech Talk

Day 2 | 4 hours

- [ ] Entry Interview
- [ ] Communication is Key
- [ ] Story Time
- [ ] Clinic-specific knowledge training

Day 3 | Full day

- [ ] Role-specific responsibilities
- [ ] Tech Training
- [ ] Job shadow

Day 4 | Full day

- [ ] Customer service training
- [ ] Job shadow

Day 5 | Full day

- [ ] Work in role with support/observation
- [ ] Review progress, areas of strength, opportunities for improvement
- [ ] Collect feedback on your onboarding & training program (and adapt accordingly!)