

No More Warm Bodies

Recruiting, Retaining, and Training the Right Customer Relations Staff

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It's a dilemma every hiring manager faces: Hire a "warm body" to have someone in place quickly before the position is frozen — or worse, eliminated — or take the time to find, train, and appropriately compensate the right individual for the job.

In his book, *Good to Great*, Jim Collins says successful companies "first got the right people on the bus (and the wrong people off the bus) and then figured out where to drive it." All too often initiatives fail not because of poor strategy but because of the wrong people behind the project. The desire is strong to have the right people, the right road map, and the right results. The deeper challenge is in taking the time to develop a culture with a road map for recruiting and training the right people, and then giving them a clear focus and strategy that enables them to grow and advance in their work.

Much more angst is caused by a quick bad hire than by the length of time the position is vacant while the search for the right candidate is underway. Most customer relations problems result from hires that fall into one of three "warm body" categories.

- **The Gift.** A person is "given" to the hiring manager by another department or division and put into the role with no regard to strategy, approach, how the individual will interact with the customer, or even the possession of the right skills and competencies for the function.
- **The Mapless.** An individual brings the right skills, competencies, and experience to the position, but the organization has no infrastructure or strategy to help the person succeed.
- **The Dead End.** The person has the right skills and competencies and is given training, but nothing is done to motivate or retain the person with a career path. The other dead end is the person who has all the capabilities but is seeking a way to "coast" in an easier job and wants to take advantage of the apparent freedom the position presents.

By focusing on the three key areas of recruitment, retention, and training, a manager can avoid these problem hires and select the right individual for the position and build a highly focused and successful customer development function.

The recruitment process

A manager who looks at recruitment simply as filling a vacancy is bound for failure. A smart manager sees recruitment as an opportunity to clearly define the strategy for the position, determine cultural and organizational areas for alignment and goals for each

specific customer group, determine the appropriate approach and style to take with those groups, and define how the person contacting the groups reflects the organization. Based on these qualifiers, the necessary skills and competencies of the employee, as well as the right cultural fit with the organization, will naturally surface.

Before actual recruitment begins, the manager develops an actionable and accountable job description that clarifies what a day in the life of this employee looks, feels, and sounds like. Again, the right skills, competencies, and cultural fit will surface. For example, a job that requires a self-motivated, self-driven individual working alone in the field 60 percent of the time would not be suitable for a candidate who is accustomed to being part of a larger team in a structured office environment.

A clear compensation strategy is an integral part of the recruitment process. Managers should work with members of the human resources department, using them as internal consultants to review base pay and peer-to-peer equity, both internally and externally. There should also be clear parameters (and budgets) for expense reimbursement, covering car allowances or mileage, cellphones, laptop computers, and other necessary tools.

Although incentives such as performance-based bonuses are part of the compensation package for sales staff in other industries, they are used by less than half of health care organizations with a sales function. Managers must frame the components of the compensation package and how any incentives will be determined. They also must make sure the position is at the right level in the organization's reporting structure. When working with human resources staff on the actual recruitment process, hiring managers will want to ask the following questions.

- Is it an internal or external search?
- How are internal candidates screened?
- How are external sources identified?
- What needs to be changed in the normal recruitment process to accommodate this position?
- How can a floor nurse or department head search be modified for the customer relations position?

Managers should look for candidates who have either health care or sales and marketing experience. "If the candidate possesses some experience in either field, we find the mantra 'hire for talent, train for skill' tends to be valid with either scenario," says Laurie Slater, director of business development for ambulatory services at BayCare Health System in Clearwater, FL.

Experts suggest that hiring managers clearly define steps in the recruitment process and the time frames for accomplishing each one. They also need to identify executives and others, such as the CEO, chief medical officer, and important internal customers, who will have a hand in screening candidates.

Two lines of questioning are useful in interviewing candidates for a customer development position. The first explores a candidate's background, skills, competencies, and cultural fit with the organization. The second delves into a candidate's ability to actually perform the job. For example, a candidate might be asked to role-play a meeting with a physician or practice administrator.

Slater, who manages a dedicated 14-person sales team, employs three screening tools to evaluate candidates during the interview. In addition to looking for personality clues, she asks candidates what "sales" means to them and how they define "sales." An answer that defines "sales as relationships" demonstrates that the candidate understands sales as it functions in Slater's organization. Her third tool often is most telling. "Envision yourself as the front-desk person at a physician's office on a busy day and think about how you would perceive [the candidate's] dialogue, mannerisms, non-verbal cues, and overall personality," she tells hiring managers.

A waiting-room scenario helps Karen Schafer, manager of physician and referral relations at Covenant HealthCare in Saginaw, MI, gauge an applicant's approach. Schafer asks the applicant to play the role of a new physician liaison making a first visit to Dr. Smith, an orthopedic surgeon. She describes a packed waiting room and a receptionist who says Dr. Smith won't be able to see the liaison because he's running 90 minutes late. "How might you respond to this situation? What kinds of things are you thinking about?" Schaefer asks the applicant. The answers help her sense whether the applicant's response is consistent with the organization's culture.

When interviewing clinicians, Schafer explores their thoughts about selling in a competitive environment by asking how they feel about competition in health care or who they see as competitors. "Some clinicians don't feel competition has a place in health care, and they just aren't cut out for this role. This simple question weeds out those individuals," she says. She also considers how clinically oriented individuals will adapt from a role where problems typically are resolved by the end of the shift to one where they are working toward a long-term "sale." "This role requires the ability to use their time appropriately to accomplish long-term objectives," she adds.

A worksheet that weights various skills, competencies, and cultural fit on a scale of 1 to 5, based on their importance to the organization, is highly recommended. Hiring managers can use this tool in every step of the process, from resumes and phone calls to one-on-one and team interviews, to obtain an objective view. A worksheet also keeps everyone engaged in the process and focused on why a person is truly a good candidate

The retention plan

The ideal person is on the bus. Now what? Many times the first six months are spent without the basics of an office, computer, phone, or even business cards. And we expect this person to succeed? The organization must have a distinct plan from day one

for bringing new hires on board and keeping them there while also making them feel welcome and valued.

Second in importance to office basics are internal exposure and access. Even if the hire is internal, the person should be treated as someone new to the organization. After all, the person is in a new role. The new hire should be introduced throughout the organization, meet the right people, understand operational procedures, experience how products and services are delivered, and have exposure in relevant meetings. In many cases, the customer relations position is an island because it doesn't have peers or a network within the organization. The manager's challenge is to acknowledge and value the independent nature of the function while also giving the person a network and a sense of belonging.

The new employee needs an orientation plan that starts on his or her first day and goes hand in hand with the retention process and management plan. The standard three-month probation period for a new employee is not practical given that it typically takes up to six months to get the individual fully aboard. A six-month period allows the person to fulfill mandated probationary training and the organization's required checklist of products, service lines, and operational knowledge, coupled with test calls on current loyal or internal physicians. In some cases, it takes the organization that long to embrace the individual and the position, especially if the role is a new one for the institution.

Slater puts her new hires through a two- to three-week orientation that includes in-depth product study, operations shadowing, and field visits with experienced representatives. "We encourage participation in all operations and business development meetings prior to completion of the orientation program. A buddy to bounce ideas off of and almost daily meetings with the manager provide the new hire with needed guidance and support," she says. Slater then lets new sales representatives decide when they are ready to visit offices on their own.

The manager needs to develop a management plan for new employees. The plan should clearly define how frequently the manager will meet with them, how often they will be observed in the field, professional and personal development opportunities, and their participation in any special projects or committees within the organization. The plan should also define the career path for this role. Importantly, it should cover how each employee will be motivated, recognized, and rewarded. Not all employees want more pay or their name in the organization's newsletter, so personalization is important.

A performance management plan is another key retention element. The manager should clearly provide the employee with performance expectations, measures, and time frames for review. A score card to monitor training, development, and results becomes an objective tool to help give appropriate and timely feedback. An annual performance review won't fix something (or someone) that's been floundering for the past nine months.

The training strategy

The right people are aboard, the retention plan is clear, a management plan is in place, and orientation is in the works. Let them do their job, right? Wrong!

A training plan should clarify expectations and explain the organizational culture. Tactically, it should map out what the employee is expected to learn and accomplish in the first six months. For example, the employee should interview key department heads and internal clients and write a report on positioning, service-line opportunities, and targeted customers for inclusion in a product knowledge book for the department in question.

Laura Sinnard, director of physician services for Trinity Regional Health System, a three-campus provider on the Illinois-Iowa border, lets key directors and managers know about the new hire before having the individual contact them to set up interviews. They are advised to prepare a training agenda about their product or service for the new staff member. The representative is then charged with setting up the training meetings. New hires "need to be comfortable contacting people and asking for an appointment," she says. "I have them come up with a list of questions they want to ask and review those with me before the meeting."

At the same time, new hires should be immersed in learning about specific products and services and also be exposed to them from the customer's point of view. The employee needs to speak the language, know the people who interact with the customer, understand the actual procedures, be aware of staff and patient processes, and see how both physicians and patients benefit from the product.

Beyond product knowledge, the new employee needs to translate product features into benefits meaningful to targeted customers. This work helps the employee craft questions to identify a customer need and benefit-oriented language that positions a solution to that need. This process also creates a dialogue and builds trust between the service-line management team and the customer relations staff. It ensures that market intelligence, product updates, and appropriate issue/ complaint management will follow.

Formal sales and service training often is needed, especially if the new employee doesn't have a strong sales background. This training is best conducted in a classroom format that covers the formal process of selling and servicing accounts, coupled with messaging and scripting techniques. Employees should come away with a plan for setting goals, selecting targets, getting in the door, following up on their initial contact, differentiating the product or service, responding to issues/concerns, closing the sale, and developing and fostering an ongoing relationship.

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It's important for new employees to understand the strategy, rationale, and goal for working with customers and their individual style and approach in the relationship. The manager must provide tools and techniques for territorial sales planning and targeting and effective relationship management. Employees should have scripting examples for scenarios at each step of the customer relationship cycle and opportunities for role-playing and practice sessions, so the materials and messages can be personalized to match the individual's own style and approach.

Training must be continuous, and it must be applicable. One idea is to use part of a regular monthly sales meeting to focus on one specific area of sales training and reinforce core sales principles. Having a different team member plan and lead the session each month by presenting a real situation and role-playing different solutions offers a dual benefit. The individual learns new presentation skills while the rest of the team gains new knowledge.

The entire process comes to fruition when the employee goes into the field. Sales reports show activity and contacts, but how does the manager know if the individual is really doing the right things? Slater notes that allowing representatives to go into the field alone too early can be detrimental to their success. "They don't have time to practice the skill of opening, selling, and closing," she says.

Schafer says sometimes having employees go into the field when they feel they are ready, even though the manager hasn't observed them in action, is worth the risk. "The types of individuals who are drawn to these roles are usually high-energy types, and having to wait too long before being allowed to go out and try it on their own can be discouraging," she explains.

Regardless, field training is an important element of the plan. Whether it's the manager, a peer, or an external coach, someone needs to observe and provide feedback. Until representatives get that feedback, it's difficult for them to improve. "The thing most liaisons need help with is listening rather than talking," notes Sinnard.

Avoiding the gift, the mapless, and the dead-end employee isn't easy. It takes a commitment to move from "hiring" to "selecting" to get the right people on the bus. Once the right people are aboard, they will need the right retention and training plans to keep them on the bus and to give them — and their organization — a great ride!



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