**Onboarding Two Week Training & Evaluation**

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| **EMPLOYEE INFORMATION** | | | | | | |
| Name: | | Start Date: | | | | |
| Position: Consultant | | Supervisor: | | | | |
| **FIRST DAY** | | | | | | |
| Provide New Employee Handbook | | | | | | |
| Orientation   * Orientation Manual * System Log Ins * System Tutorials   + Client Portal   + Time Keeping Tutorial   + EMR Tutorial   + Email Tutorial   + CRM Tutorial   + Sales Tutorial * Complete HR Paperwork * Verify All Processing Paperwork Signed * Position Job Description Clarification * Review Key Policies * Orientation Slides * Client Portal Video & Material * Q & A – Quiz Total Score:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | |
| Review Key Policies | * Company Mission Statement * Vacation and Sick Leave * Leaves of Absence(FMLA) * Holidays * Time and Leave Reporting * Overtime * Performance Review * Uniform * Environmental Policy * Right to Know | | | * Personal Conduct Standards * Progressive Disciplinary Actions * Security * Confidentiality / HIPPA * Safety * Emergency Procedures * Visitors * E-mail and Internet Use * Anti-Harassment * Parking | | |
| **SECOND DAY** | | | | | | |
| Learn Job Functions | * Study Consulting Booklet * Familiarize w/Mock Patient Chart * Familiarize w/Mock Consulting Book | | * Learn about products/effects * Watch First Training Video * Sit in on Webinars, if available * Patient Etiquette * Learn the difference between HCG and Lifestyle protocols | |  | * Handle Patient Charts * Shadow Consulting Appointments * Make a Food Journal * Download Food Journal App * Consultation Assessment Evaluation Sheet |
| **Position Duties:**  The Consultant is primarily accountable for the evaluation of the patient’s weight loss and lifestyle goals. They will educate and explain programs and services available to them. The Consultant should have a strong sales ethic and be able to encourage customers to purchase a weight loss package. The successful Consultant will have a closure rate of 80% and a $1,000 per sale average. | | | | | | |

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| **DAYS THREE, FOUR, & FIVE** | | | |
| **Reinforce Skills, Policies & Procedure for Position** | | | |
| **Day 3** – Check the boxes of the duties the new employee has completely grasped and is fluently executing | * Study Consulting Booklet * Familiarize w/Mock Patient Chart * Familiarize w/Mock Consulting Book | * Learn about products/effects * Watch Second Training Video * Sit in on Webinars, if available * Patient Etiquette | * Continue studying protocols * Handle Patient Charts * Manage Food Journal * Shadow Consulting Appointments * Lunch N Learn/Events |
| **Day 4**– Check the boxes of the duties the new employee has completely grasped and is fluently executing | * Study Consulting Booklet * Familiarize w/Mock Patient Chart * Familiarize w/Mock Consulting Book | * Learn about products/effects * Watch Third Training Video * Sit in on Webinars, if available * Patient Etiquette | * Continue studying protocols * Handle Patient Charts * Manage Food Journal * Shadow Consulting Appointments * Lunch N Learn / Events |
| **Day 5**– Check the boxes of the duties the new employee has completely grasped and is fluently executing | * Study Consulting Booklet * Familiarize w/Mock Patient Chart * Familiarize w/Mock Consulting Book | * Learn about products/effects * Sit in on Webinars, if available * Patient Etiquette * Continue studying protocols | * Handle Patient Charts * Manage Food Journal * Shadow Consulting Appointments * 1:1 w/Corporate Trainer * Lunch N Learn/Events |
| **End of Week One Evaluation:** | * Able to Follow Directions * Executing Procedures Effectively * Answering Patient questions and concerns with appropriate Verbiage * Is inquisitive and asks pertinent questions * Is a team player | * Is friendly and seems to work well with others * Grasps Daily Job Duties * Does Not have to be asked more than once to complete a task * Dresses appropriately for their position. * Has Satisfactory personal hygiene * Demonstrates strong sales skills | Has had Satisfactory attendance   * Monday * Tuesday * Wednesday * Thursday * Friday |
| **Employee needs to improve on the following:** | | | |
| **Supervisor Name: Position: Consultant**  **Employee Name:**  **Signature of Acknowledgment:** | | | |
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| **WEEK TWO** | | | | | |
| **Mastering Systems, Skills, Policies & Procedures:** | | | | | |
| **DAY SIX** | | | | | |
| Systems Knowledge | | * EMR * Email * Time Keeping * Client Portal | | * Pass * Pass * Pass * Pass | * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement |
| Policy & Procedure Knowledge | | * Professional conduct and communication w/Patients * Dress code / hygiene * Parking * Time management * Friendly attitude towards coworkers | | * Pass * Pass * Pass * Pass * Pass | * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement |
| Position Duties Knowledge | | * Proper use of verbiage with patients * Caring, persuasive method of helping patients choose customized plans that fit their individual needs * Strong knowledge of protocols / products * Effectively promote services, products and specials * Completing initial paperwork * Creating patient charts * Obtain copy of patients’ current driver’s license / ID * Arrange payment for services rendered * Scheduling lab work and first counseling appointments * Demonstrates strong sales skills | | * Pass * Pass * Pass * Pass * Pass * Pass * Pass * Pass * Pass * Pass * Pass | * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement |
| **DAY SEVEN** | | | | | |
| General Performance | | * Clarifies any misunderstood information * Pleasant demeanor with all staff and patients * Shows up on time * Maintains professional conduct at all times | | * Pass * Pass * Pass * Pass | * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement |
| Policy & Procedure Knowledge | | * Professional conduct and communication w/Patients * Dress code / hygiene * Parking * Time management * Friendly attitude towards coworkers | | * Pass * Pass * Pass * Pass * Pass | * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement |
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| **DAY EIGHT** | | | | | |
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| **DAY NINE** | | | | | |
| General Performance | | * Clarifies any misunderstood information * Pleasant demeanor with all staff and patients * Shows up on time * Maintains professional conduct at all times | | * Pass * Pass * Pass * Pass | * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement |
| Policy & Procedure Knowledge | | * Professional conduct and communication w/Patients * Dress code / hygiene * Parking * Time management * Friendly attitude towards coworkers | | * Pass * Pass * Pass * Pass * Pass | * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement * Needs Improvement |
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| Supervisor Signature: | | | | | |
| **END of WEEK TWO TRAINING EVALUATION** | | | | | |
| **Initials** | **Task / Policy / Procedure** | | **Date Completed / Mastered** | | |
|  | HR Orientation / Onboarding | |  | | |
|  | Policy & Procedures | |  | | |
|  | Dress Code | |  | | |
|  | Parking | |  | | |
|  | Attitude / Behavior / Demeanor | |  | | |
|  | Attendance | |  | | |
|  | Product / Package / Plans Knowledge | |  | | |
|  | Professionalism with Patients | |  | | |
|  | Proper Charting | |  | | |
|  | Scheduling Labs & 1st Counseling Session | |  | | |
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|  | Strong, Persuasive Salesmanship | |  | | |
|  | Time Management | |  | | |
|  | Handling Payment Arrangements | |  | | |
|  | Appropriate Verbiage w/Patients | |  | | |