

# PLANNING AND EXECUTING A SUCCESSFUL CANDIDATE SITE VISIT

By Kathy Noland, RN, PhD — Vice President, B. E. Smith

**A**s guests arrive for the soiree of the year, they are quickly enveloped in a welcoming atmosphere of gracious attentiveness, selfless service, and impeccable manners. They soon feel a sense of belonging, simultaneously understanding their roles in a two-way exchange that stimulates pride, mutual respect, and the art of conversation.

Oddly enough, most people would knock themselves out to put their best foot forward in a social setting, but might forget this valuable lesson in their professional lives, particularly when it comes to hiring and recruitment.

In his article “Death by Lethal Reputation,”<sup>1</sup> employment consultant Nick Corcodilos details the nosedive of a major Silicon Valley company that was one of the pioneers of the modern computer industry. This company had difficulty hiring, or even attracting, top candidates. Those who did come for a site visit squirmed through an uncomfortable, tiring process of disjointed meetings filled with tedious, complex questions.

The complete list of faux pas was quite extensive, but Corcodilos broke it down to cynicism, indifference, rudeness, and a lack of context. The company lost perspective of its candidates by relying on a lockstep, administrative hiring process without flexibility or dynamism. In other words, it lacked the human touch.

That’s not to say that candidates should expect a party with balloons. It does mean that site visits are more social art than administrative science.

**Candidates are human beings who, despite their various exterior defenses, all want to feel wanted, respected, and engaged.**

As part of a study on how candidates viewed their site visits, researchers followed 62 MBA students through job searches involving 97 site visits to determine how these visits affected perceptions of the hiring companies and their ultimate decisions. The findings suggested that organizations can improve recruitment success by paying attention to how site visits are conducted.

In “Job Candidates’ Views of Site Visits,”<sup>2</sup> the authors discovered candidates see the visit as an important source of new information, “filling in large gaps in the body of knowledge that is needed for applicants to make their career-choice decisions.” After 76.8 percent of the site visits in the study, most indicated they had changed their estimate on the likelihood of a job offer being extended, based on their perceptions of how they were treated and of the interviewers’ behavior during the site visit as indirect indicants of the organizations’ interest.

Such estimates are important because they can indicate a top candidate’s willingness to remain in the job hunt.

## HELP YOURSELF

Although this amounts to preaching to the choir, it is worth noting that there is a critical shortage of qualified healthcare leaders. The old way of filling executive healthcare positions, succession planning, may take a backseat as hospitals consolidate and cut budgets to become leaner and more responsive to increasing patient demands. The result: It’s a seller’s market. Top healthcare leaders looking to make a career move have many opportunities and probably are considering four or five positions at the time of a site visit.

“Going the extra mile to put the special touches into a candidate’s site visit can be the deciding factor in selling the candidate on your organization and the community,” says Lisa Herndon, Director of Marketing and Recruitment for Baptist St. Anthony’s Health System, Amarillo, Texas.

Conversely, a poorly executed, paint-by-numbers site visit can leave a top candidate feeling unwanted and used, doubting the leadership’s sincerity and questioning the organization’s culture and integrity.



**B. E. S M I T H**

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## THE 'WHY' OF SITE VISITS

Virtually every healthcare organization conducts site visits for candidates, but do they really know why? Chances are, if your organization follows an intractable administrative hiring process, you understand the administrative process you strictly follow rather than the “why” of the visit.

Site visits are two-way assessments rather than inquisitions. The former makes a positive impression, but the latter results in a high level of candidate discomfort right from the start. If a first impression is negative, your best candidate could end up tuning out the many positives you offer.

The three most basic **reasons for a site visit** can be expressed succinctly:

- To conduct a thorough and fair assessment of the candidate’s skills, experience, and fit for the position
- To inform the candidate of the merits of the position, organization, and community, and the opportunity to join an insightful leadership team
- To provide the candidate with a real opportunity to make a fair assessment of the position, the organization, and the community

It all sounds simple, but that simplicity is derived from advance planning and homework. First and foremost, the individuals that a candidate meets throughout the day must be comfortably articulate about the organization’s mission, goals, and direction. They must understand the position intimately enough to describe exactly what is needed. And they must have a preliminary, fairly formed picture of whom that candidate is in order to put their best foot forward for that particular site visit.



## THE SUCCESSFUL SITE VISIT

From the moment a candidate visit is arranged, the candidate is researching, considering, even scrutinizing, the organization. “Healthcare faces a national shortage of qualified leaders, and we know the outstanding ones have many opportunities from which to choose,” says Leslie Arnold, Director of Human Resources for CHRISTUS Santa Rosa Health Care in San Antonio, Texas. “I make sure I greet our guests and usher them through a very organized, positive experience. At the end of the visit, I want the candidate to know they will be joining a world-class organization in an outstanding city.”

Although there’s no one recipe for a great site visit, several principles apply to every situation:

**Commit to one well-planned and -executed site visit for making a hiring decision.**

Multiple site visits will only dilute and complicate any assessment process and candidate comparison, while decreasing search momentum and a candidate’s interest. If you feel as though you cannot get the picture you need in one visit, revisit your plans.

**Designate an organizational point person (host) who is responsible for planning, organizing, and running the visit and for conducting the follow-up.**

This pivotal person takes overall responsibility of the visit from beginning to end, although he or she doesn’t have to go it alone. Appoint an administrative assistant to handle some of the details, remembering that the point person remains in control at all times.

**Determine the key stakeholders in the site visit, and set a date that works for most.**

Diplomatically speaking, the key people need to be involved with the interview process to achieve the most rounded consideration of the candidate. Don’t risk losing a great candidate by waiting until everyone can participate. A phone interview for the few who were missing will suffice.

### Consider group and individual meetings carefully.

If a group is composed of those who would report to this candidate or if a physician group is pertinent, be sure to include the point person or a representative from management to keep the meeting balanced. If internal candidates are involved in the site visit, the point person needs to manage this carefully. An internal candidate should never conduct a one-on-one interview with an external candidate.

### Focus on the order of the agenda to obtain the most valid assessment of the candidate.

Begin with a tour of the organization, followed by visiting the specific areas in which the candidate would be involved. Mix the interviewers according to style (e.g., dynamic, tough, dry) to try to keep the candidate fresh and attentive. Many organizations go right to the top for the first interview, enabling the CEO to set the overall tone for the day and to best represent the organization's vision and mission.

### Plan the logistics well.

All participants in the site visit interviews should be prepared, understand their roles and the level of decision-making, and have a working knowledge of the interview techniques employed by their organization. This includes an advance review of the agenda and the assessment tool, and candidate information. The leadership group involved in the visit must present a winning, unified front. From there, the attention to personal detail makes all the difference:

- Make sure the candidate stays in a relatively nice and conveniently located hotel; a fruit or snack basket helps cement that positive first impression.
- Invite the spouse/significant other, because he or she inevitably is involved in the decision to change jobs and move to a new location.
- Make sure the spouse is occupied while the candidate is engaged in interviews.
- A nice dinner is a relatively inexpensive investment that generates big returns. It can go a long way in determining a fit with the culture.
- A thorough community tour with a reliable real estate agent or internal marketing/PR person helps drive a decision to move to your location.
- Give the candidate a home away from home—for example, a conference room or office he or she can use.
- Allow adequate time for the candidates to contact their organization throughout the day as needed.
- Don't wear a candidate out. Provide ample breaks with snacks and water. Doing so impresses candidates and helps keep them at their best.

### Be open and honest.

Every organization and leadership position has its challenges. It's best to articulate those clearly and honestly in the context of the organization's goals, values, mission, and culture. An over-emphasis on the negatives does not attract top-notch leaders; a balance of the positives and the challenges must be presented.

### Administer the leadership assessment profile or tool after the candidate leaves.

Don't undermine everything you've just accomplished over the course of a long day. Any assessment conducted while the candidate is on site interrupts the flow of the visit, is too taxing at the end of an intense day, and makes it almost impossible to quietly concentrate on the task at hand.

### Plan adequate time for the closing of the visit.

Rather than just shuffling candidates off to Buffalo at the end of the process, conduct a low-key wrap-up that includes a sincere thank-you for their time and travel, conversation about the next steps, and a chance for candidates to express appreciation while summarizing their impression of the day and their interest in the job.

### Summarize the visit results and decide on a follow-up plan and the next steps.

The worst thing you can do is to leave a great candidate hanging, so have a standardized process for communicating the results of the visit internally and discussing them with the recruiter within two to four days following the on-site interview. The recruiter needs to communicate with the candidate as soon as possible. You must display continued interest in the professional you want to hire, from the moment they walk out the door.



## PITFALLS TO AVOID

Small missteps might be made during the course of a long day, but if the visit is well planned, the candidate's impression will be positive. To ensure a successful on-site visit, avoid the following:

- A demanding schedule and/or grueling, complex questions that amount to an endurance test. The ability to survive an exhausting site visit is not an indication of a candidate's potential on the job.
- Interviewing by a cast of thousands. Too many words and faces will simply confuse and alienate a candidate.
- A complex scoring grid that skews results and can essentially rule everyone out. Candidates are human beings, not robots.
- Judgmental comments about appearance or a single answer taken out of context that can derail the process and jade the entire visit regarding the candidate's actual qualifications.
- In a perfect world there would be no reason or need for site visits. No one is perfect, so believing that you are about to discover the perfect candidate is a waste of your time—and the time of the candidate sitting in front of you. Being able to find a superhuman being if only you wait is a fallacy.
- Believing that a site visit resulting in a “no hire” is a negative result. Remember the purpose of the visit. You're getting better acquainted with the candidate. You're carefully watching and listening in an up-close and personal manner. There's really no other way to accomplish your hiring goals.



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## CONCLUSION

If a site visit were a boxing match, then the goal of beating someone to a pulp would be a laudable one. Of course, that's not the purpose of a site visit, but that's how many candidates feel by the end of one. If the process is unduly grueling, disjointed, or confrontational and tense, a candidate can easily come away feeling like a punching bag.

Site visits are more art than science, more dynamic than textbook. A purely administrative interview involving grids, “test scores,” and reams of esoteric, profiling questions more than likely will result in hiring the wrong candidate for the position. You are, after all, gambling that the process itself will identify the perfect candidate. It won't. It's far more important to have a solid feel for how that imperfect person will fit into your imperfect organization. Site visits can accomplish that goal—if the time and forethought for planning are put in. A site visit is an important investment of time and money for your organization and for the candidate. Make sure you receive a positive return.

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**Kathy Noland, RN, PhD**, is a Vice President with B. E. Smith, a leading healthcare search firm specializing in permanent executive placement and interim management consulting services. Kathy has more than 20 years of experience in senior leadership positions with urban, suburban, and rural hospitals, home care companies, and health systems. Kathy is a noted speaker and publicist in the areas of quality management, health care innovation and change, and home care services. She specializes in senior and mid-level searches including chief executive officers, chief nursing officers, vice presidents, and directors of nursing within hospitals and healthcare organizations.

**You may contact Kathy directly at 800-397-2078 or [knoland@besmith.com](mailto:knoland@besmith.com).**