

## IN-OFFICE OBSERVATION

### PURPOSE

- To give the applicant an opportunity to assess you and your office.
- To assess the applicant as to their default behaviours in the context of your office.
- To check the applicant against the referee's feedback.
- To test the applicant for numeracy, literacy and critical thinking skills
- To let your team give feedback as to the applicant's worthiness of working with you all.

### PROCEDURE

- Prior to the applicant visiting acquaint yourselves (all of your team) with the applicant's CV and history.
- Speak with the applicant's referees for their honest feedback. (Don't believe everything that a referee has said on their reference – they will most likely omit those aspects of the person that are not favourable).
- Have the chosen people come and observe in the office for several hours. Watch their behaviours – they speak loudly.
- Welcome the applicant to the office, show them where they can place their hat, coat etc. and give them a vague invitation to make themselves at home. Emphasis that they are here to assess you and the office and they have free reign to go where they want and do what they need to do to conduct their interview of us.
- Have the applicant perform several tests to ascertain their ability to:
  - Critically assess numbers via a Transposition Exercise
  - Assess alphabetical sequencing via a Filing test (even if you are fully computerised).
  - Memo test

### SCRIPT

*“Hi (Name), it's great to see you. Let me show you where you can put your belongings. You are here to see whether we measure up to your standards and see if we are a fit for you. For the next 2 hours, this place is yours. We invite you to observe, ask questions and generally find out how things tick. Nowhere is off-limits so make yourself at home. There will be a couple of tests that we will ask you to do during this session. So, welcome and have fun”.*

## TRANSPOSITION EXERCISE

Ask the applicant to compare the two lists of numbers and locate the transposed numbers and correct the errors.

(Create a form for this)

## FILING TEST

If you have a physical alphabetical file of anything place 6 or 7 files out of place and ask the applicant to go through the filing draw/rolodex/system and locate the misfiled files/pages

## MEMO TEST

During the session casually ask the applicant to take a note and put it somewhere. The note should include time, date and a specific request to be actioned by the recipient. E.g. "Could you please make a note for Dr X that the dentist called and he needs to be there by 3:30 on Friday the 20<sup>th</sup> so that he can get an X-Ray taken – can you put it in his communications basket/intranet file/FB message etc."

Note how this request is handled and completed.

# END OF IN-OFFICE OBSERVATION

## PURPOSE

- To bid the applicant a fond farewell and thank them for making it this far.
- To make sure that their questions are answered.
- To make sure that you find out any other information about the applicant.
- To let them know that they will be contacted within (Number) days.

## PROCEDURE

- At the completion of the applicants visit time they meet with a designated team member for a debrief.
- Following the debrief the applicant is dismissed and informed on the procedure from here.

## SCRIPT

*“(Name), it has been a pleasure having you with us today. What questions do you still have for us? (Follow this path until the applicant and the team member is satisfied).*

*As you know there are two other people who we are considering so what we will do is have a meeting and then call everyone to let them know our decision. We will do this within the next (Number) days. Is that OK?*

*Thanks so much for coming in and we will keep our fingers crossed that we will see a lot more of you in the future”.*

## THE SUPER CA IS FOUND

Congratulations – by now you will have decided on who your next Super CA is. Call the successful applicant and make sure that she/he is still wanting to work alongside your team.

The applicant is notified that there will be a trial period of 3 months with evaluations at end of first month and end of trial period.

The training process for your new CA should be in your Office Policy Manual (if you don't have a comprehensive Office Policy Manual you need it so click [here](#) (link to the OPM Template).

If you don't have the resources for a comprehensive CA training, feel free to contact us and you can speak with our CA Coach to ascertain your needs.