

Ep #62: Interview with Carmen Torres



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Dr. David Phelps and Evan Harris

[Dentist Freedom Blueprint](http://www.DentistFreedomBlueprint.com) with Dr. David Phelps and Evan Harris

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You are listening to the *Dentist Freedom Blueprint* podcast, with David Phelps and Evan Harris. Navigating you through the uncharted waters of a turbulent economy with straight-forward advice to, transform your practice into a self-sufficient cash machine, compound your net worth assets, and multiply, multiply, multiply your passive cash flow streams.

David: Welcome back everyone to the *Dentist Freedom Blueprint* podcast and also Freedom Founders mastermind community. This is Dr. David Phelps, your host, back with you today with a really fun, and this could be a very interesting, interview call today with a person who's become a good friend of mine and I'd say a trusted business partner.

Before I give you her name, I'll tell you a little bit about what she does and why she's become very relevant to I think everything that I see in my business and I know that every one of you listening to the podcast today is also going to say, "Yeah, I've definitely been down that road. I definitely wish I would have had help or done it a different way." Well what is it? It is HR, human resources.

My guest today brings over 20 years of experience in creating equitable, safe, and collaborative workplace environments for both employers and employees. She's a trusted advisor to many organizations. She's successfully helped countless small to mid-sized businesses and non-profit organizations establish reliable, stable human resource departments.

Her approach includes a 360 degree analysis of the human resources function that results in building job descriptions, policy and procedures manuals, conflict resolution, employee retention, and termination structures, compliance, audit standards, and employee communication.

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Gee, I've never had to deal with any of that. So without further ado, let bring on my good friend, Carmen Torres. Carmen, how are you doing today?

Carmen: Great. Thank you for having me, David.

David: It's a pleasure because what I just read off, all the things that you do are things that every one of us in small business, professional practice, I know that lit up everybody's inner brain when I read those things. We're all thinking, we're thinking "Oh my gosh."

We know there's so many gaps in everything that we should be doing but we just can't get there because we're so busy doing everything else in our businesses, trying to keep them afloat. Dealing with all the other issues of just marketing and customer service and those things.

Yet, we tend to put, I think, employee, staff, human resources on the backburner. It's kind of one of those things that we go, "Well, we're just going to have to do it." We have to fill spaces in our organization when the time comes. Sometimes we lose people. Occasionally we have to let someone go. Every one of us, Carmen, hates the day when we have to fill a spot. Can you relate to how we feel?

Carmen: Yes, absolutely. You're absolutely right. It's what happens. A lot of entrepreneurs, they start as solopreneurs and they're doing everything. One of the things that they forget to do is to think about the procedures from the HR point of view. Such as the employee manuals and staying compliant with those state and federal laws. But that's where I come in.

I come in and help the business owners with their HR needs, employee situations. It's really a great thing for me

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to be able to offer because a lot of the clients that come to me, it's about, "I'm ready to hire someone. I have no idea what to do. What's the next step?" So it works out great.

David: You've been involved with this for like 20 years, how did you first get started in this arena of helping business owners in this way?

Carmen: With my 20 years, that goes back to some of my first positions, either as an executive assistant to a CEO or a CFO, having to handle payroll, having to be the communicator to the staff regarding their pay information or vacation questions that they may have had.

Throughout the years, I built my HR career, first as an HR assistant and eventually as a director of operations and human resources and manager, being able to manage HR departments of up to 250 employees. But recently, or actually about seven years ago, I was working for a really amazing company but we were forced to lay off staff. I was asked to lay off 90 percent of the staff.

David: Wow.

Carmen: Yes, first of all, to have to communicate something like that to employees, you have to be really careful about the message that you want to relate. So while I have to be the person who gives the communication on behalf of the employer, which is also something they didn't want to do but it was necessary, I also have to be aware of how the employee will receive it.

So having to have that—just ability to communicate was crucial. But after having gone through that and then eventually deciding whether I wanted to take a 50 percent cut myself and go work with someone else or start my own business. I decided I have the knowledge, I have the

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experience, people trust me, and I think this is the way for me to go. I want to help people. I want to help business owners. I've been doing it for seven years now.

David: That's outstanding. There's a lot of potential liability when a business owner has to let someone go, whether they have to downsize or if it's for cause, a lot of potential liability today, more so than ever before, right?

Carmen: Yes, very true, especially because wrongful termination claims are one of the biggest claims that employers are faced with. It's because they don't know how to properly terminate. Even though a lot of states are at-will employers, meaning either party can terminate the employment relationship with or without cause, with or without notice, you still have to be aware of making sure that you're not discriminating.

David: Sure. One of the things that it seems like every small business owner is guilty of at least once, probably for me it was multiple times, that is we tend to hire really fast. We've got a vacant spot in our organization, we lose somebody for whatever reason and we just feel like we've got to fill that place so quickly.

On the other side, we don't have a very good onboarding process so when new people come on, we don't have a good vetting or onboarding process, so when new people come on, they might be good people, a good person, but they may be in the wrong position. We didn't have a good training. So then we get frustrated. Then sometimes that turns out we lose that person as well or we hang on to people that maybe shouldn't be with us in the first place. We hang on way too long. I know that you have seen that.

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That's one of the things that I think what you do, you help both sides of that, right? Because of your experience and your counsel on the hiring side you can help the employer have a better process to make a better decision so they don't have to do it so fast and end up regretting the choice they made, correct?

Carmen: Yes, that's correct. The scenario that you mentioned is exactly how it happens. What I hear all the time is, "I need to hire someone."

"Sure. When do you need them by?"

"I needed them yesterday."

David: Right, right.

Carmen: So then I get the emails or the call that says, "Can you get me someone? I need someone this week or by the end of such and such time." I say, "If you want to bring in the right person, first let's take a look at what you have. Do you have a job description?"

"No, I don't have a job description. I need someone who has this, this, and that."

So that's really where it starts. It's creating that platform so that it can be a really great transition for both you and your new hire. Having your job description in place, knowing exactly what they're going to do, and knowing how they're going to be trained, because the last thing you want is to, like you said, bring in that great candidate and then lose them because they feel that they're not able to shine or not doing the things that they do really well.

David: One of the things, Carmen, that people have told me, and I'm not sure if you feel the same way or not, you can let us know, but they'll say oftentimes when you're looking to

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fill a void or maybe it's a new position in your company that you can start maybe first with your own network, your circle of influence. How do you feel about that?

Carmen: I think that it is important to consider your network of influence because the people that you are surrounded by know what you do, they know how you work, and probably they know a little bit about any other employees that you've had.

However, I still recommend that you follow your recruiting protocols. If that means having a screening call with them, doing an interview, questions that you might ask, specific questions, I fully recommend that. I find that sometimes just because they're a great recommendation by someone that you work with, a colleague, they're not always the best fit for your business. So going through that process will help you make the right decision no matter who it is.

David: Right. In other words, never shortcut the process just because somebody that you like and trust refers somebody else. As you said, it doesn't mean they're a fit. You don't know if they're a fit. They could be a really good person, right? Could be a really good person but just nowhere near a fit for your position. So everybody should be vetted and onboarded with the same process no matter where they come from.

Carmen: Yes, absolutely. I've had that happen a couple of times. Recently, I was going through the screening process with a few candidates and someone sent me an email directly and says, "Hey, Carmen, by the way, here's another person that's just going to work out really great." Or, "That was referred to me and seems to be really great."

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I followed through, I went ahead with the process. At the end of the day, the person who once they received the job description and looked at what it entailed, they just said, "You know what? The position is not for me." In another situation where they said, "Yes, I'm interested" they didn't follow through with the interview session. So again, going through that whole process will eliminate hiring the wrong person.

David: I think that's really important because a lot of times a person or a business will put out an ad in some of the different platforms, maybe it's a Craigslist or an Indeed or a Monster or somewhere and you can get just inundated with all kinds of responses. Many people just hit reply and they just copy and paste in. So you're inundated with all these resumes. I mean, I'm speaking from experience here, Carmen.

As the business owner, if you don't have a process in place and you've done it that way, you get bleary-eyed because you're having to go through 100 or more and you just want to throw the whole thing away and go, "Well this isn't worth it." Or you just pick the top five and hope there's someone in that batch. That's not a way to do it.

One of the things that you and I found and I guess I should back up and tell our story, is that you and I met earlier last year through a mutual mastermind that we're a part of.

Carmen: Yes.

David: I got to know you a little bit there and I wasn't at that very moment in the need of your services but I knew there was going to come a time because there's always a time. If you're in business, there's always going to be a time

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when you need somebody to help you in some aspect of HR.

You are so smart, I've got to give you a lot of credit. You kept in contact, how did you do it? You sent a really nice card to me and my wife, just a nice card at Christmas time just catching up. It was such perfect timing. I know it was meant to happen because I was right in the middle of needing to hire for two different positions, kind of two different companies.

Actually it's funny, Carmen, I think you remember I had just started the process. It's not that I forgot you but you made it top of mind. It's like bingo, there's Carmen. I know what she does. I just started the process and you were so gracious to come in and work with me in the middle of what I had done and you helped me pick it up from there.

So maybe I should just tell a story a little bit is that I was looking for two different kinds of people. The team I have is virtual. I don't have a brick and mortar business anymore so I'm looking for virtual staffing, which again, we could probably dig in a little bit on that if we have time. But I wasn't going to necessarily have live interviews and I needed somebody to help me to do a better vetting process.

Carmen and I together created kind of a profile then we had a platform where we put ads out. Then we had separate Gmail accounts for the different positions so we could kind of keep them separate so we weren't getting confused as to who was replying to what.

Then I created some projects that would kind of fit the scope of each position. That's when I turned it over to Carmen which was so helpful because I was right in the

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middle of being busy and I thought, man, I was not going to have time to go through all of the responses to the ads. If I tried to I was just going to be overworked and wasn't going to do a good job. So you came in and took right up.

I gave you access to the Gmail account where these responses were coming. You started sifting and sorting. You quickly pulled out the best people. We sent them the projects to do. That eliminated some more people and kind of got it down to the top six or seven. Then you did the final thing is you went and actually did phone interviews with them.

Once you had given me the response back on that and said, "Here is what I think we've got to work with, David, let's compare notes." Then together we kind of said okay, "I think we've got like our top three." I'll let you come back and clarify here because I don't want to put words in your mouth. I'm probably not saying this the right way. But we kind of made conditional offers maybe to three for each position.

The condition was that you're now going to—the final thing was you're going to check references. Which is the thing I think nobody likes to do. Because again, it takes time and you need to know what you're doing to do it. So let's dig into that a little bit. Pick up on any part of that and let's dig into some of the aspects of what you know how to do so well.

Carmen: Thank you, David. Yes, that's exactly what we did. The beauty of this is that once we did determine those top three candidates was checking in with them, making sure that they were interested, that they continued to be interested in the position. That's really important as well because you don't want to do all the rest of the legwork

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especially the reference checking which could also be time consuming if they're not completely interested.

Through that process then again we also were able to determine that the third person was no longer interested, had other opportunities come forward and so the last two candidates with the reference checking, it really helps because you're able to better understand where they'll be able to help you the most.

Listening to the references that they give you is important. You'll pick up on little things from maybe if you ask questions about, "What would be an area where they could use a little bit more help in or that they should improve in?" When they talk about that, that's the time for you to pay attention because then you know if it's an area that you need someone to be solid on or is this going to be okay?

Additionally, you're also able to tell a little bit more about how much they actually worked on a project. So if a candidate says to you, "I created a spreadsheet which helped me keep track of clients and all the daily information." Then you can ask the person who is giving you the reference, they can tell you whether it's something that they actually created. Is it something that was already created by someone else and then maybe just managed by that individual? So they can give you a little bit more detail as to how deeply involved they've been in those projects with them.

Once the reference checks were done then we again categorized them and marked them, you know, who were the top two. At the end of the day, we ended up hiring both because they were each great for the two different positions that you had. I understand that they're working

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out well and that you're happy with the outcome of hiring them.

David: Yeah, both have jumped right in. They both are doing extremely well with our onboarding and really are the kind of people I was looking for. You, again, you made it so easy because as you said, you categorized things for me. You netted everything down to the essentials of what I needed to know. You took away all of the peripheral stuff because you screened that out. You filtered out to get the information we needed.

One of the things that comes up in my mind and I think other employers is on the reference checks, Carmen. A lot of businesses, again, because I think there's a potential proposed legal liability when a person calls to do a reference check for another business who is looking at a new hire and they call the old employer.

Then old employers, isn't there some liability there? How do you get around that? Because sometimes they just want to say, "Yep. They worked here from date so and so to so and so. That's all I can really tell you." Is that really out there today or how do you get around that?

Carmen: Yes. There's no specific laws to what you can ask but a lot of companies do have a policy in place. Their policy is to be able to verify dates of employment, the position, and their pay rate if the employee has authorized for that to be released. But what you want to do is a lot of times—and that's specifically when you call an HR department. It's the response that you're going to typically receive.

However, when the candidate provides you the name of a direct supervisor or another individual that they've worked with, then they're really giving you permission to go ahead

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and ask a few more questions and it could be questions around their responsibilities, the tasks that they were responsible for, tell you a little bit about their work ethic.

But on the same hand, the person providing the information does have to be really cautious because if I was to ask, "Would you rehire this person?" and there was a silence or they were like, "Well... yes... I guess I would." Then you know that that's probably not someone that left on really good terms.

So when giving references you do want to be really cautious as to what information you provide so that the candidate has I guess a fair opportunity with the next employer. Sometimes it could just be a personal situation and you don't want to use that as a reason not to hire someone.

David: Is it fair to say, Carmen, that real A players, the person who's giving you the information on the reference, would probably be more open to give a lot of additional, "Oh, great person." And maybe B or maybe C category players, that's the ones who typically they're just going to be kind of name, rank, and serial number and that's about all you can get?

Carmen: Yeah. That's exactly what will happen. You'll see the difference. You'll have someone tell you, "Wow, they're amazing. If I could have them again or if my budget allowed, I'd definitely still have them on my team." That's the kind of response you'll get with A gamers.

With the C players then you're going to have someone that says, "Yes, they were a good employee. Unfortunately, we were not able to maintain that position." So even in the tone of their voice you're going to be able

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to hear and understand what kind of an employee they were. So I definitely listen out for the tone of their voice as well.

David: That's one of the things that you told me about and I believe it. Because number one, I think women have a sixth sense anyway about things that men, we typically just gloss over. I'm not saying we're totally clueless, Carmen, but a lot of things we are.

[Laughter]

Carmen: You said it, David.

David: I know, I know. But no, really, I mean, it's true. I really appreciate the fact that you did a lot of this work for me because in this case I think it was mostly—not being chauvinistic here—but it was mostly females that responded. I mean it would have been fine if males responded. I didn't care. We would have looked at both either way.

But I just felt better having you be the one to do the initial discussion with them because it's just, for me, and especially over the phone and that kind of thing, it's just it's a little hard for me to do, you know? I'm trying to be respectful so I don't want to dig in. And you have experience, you can dig in and not come across as being wrong position, right?

Carmen: Yes. I get that a lot from the clients that come to me after they've been trying to do the reference check and they say, "Carmen, I'm just not getting any responses. I have nothing to work with here. What am I doing?" So I say, "Let me call, let me find out, let's see if we can take another angle here."

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Sure enough when I call and I ask certain questions, and it's the way we ask the question as well. We have to ask the question in a way that is inviting, engaging, where they feel that they're providing some helpful information to the person that they want to give the reference to.

For example, I'll call and say, "Thank you very much. I received your number from the candidate." Asking the person who's giving you the reference or letting them know that you received a call from a candidate who's being considered for the position, let them know what the position is.

Tell them that their reference check will definitely help in the decision to consider this candidate further. They're more willing to give you that information when they know that the information that they will be providing can have a really positive impact on the person that maybe they're friends with or they've worked with in the past.

They want to give you really good information. It's just a matter of how you ask them. I had mentioned previously about the tone of the voice, that definitely makes a difference.

David:

That's good, that's good. There's a lot we could go into and I think what I'm going to want to do is schedule a follow up call because I want to talk in some more detail with you about the actual ads, creating the ads, the profile for the position because I know that's important. Where do you put these? Some of the things that you and I did but let me ask you one more question.

That would be, most small business owners, small employers, and I don't know how we define that. But let's say maybe with ten employees or less, that's a lot of my

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audience. Some have more, but ten or less. What could or should that small business or small professional practice owner, what could they do in advance of when that time comes when either they need to add a position because they're growing or they lose somebody? And are these some things that you could proactively help?

In other words, what I'm thinking about, I'm thinking proactively and kind of defensively at the same time, Carmen. So if I've been through this before in my business and I'm thinking, "I don't want to go through that again." What could you help me do like right now if I don't need anybody but could you help me profile?

Could you help me setup job descriptions if I haven't done a good job? What sort of things could you help—so I already have you kind of onboard—then when the day came when, "Hey, Carmen, I need some help" how much smoother would it be if we did some work on the front end?

Carmen: David, it would be really incredible if everyone could do that because it does set the tone for the type of employee that you're going to bring in. So what I could help small business owners create is a procedure, a recruiting procedure.

It will have all the information, everything from creating job descriptions, creating a job posting, where to post, what kind of questions to ask, what to look out for when you're reviewing resumes, how to set up the appointment, what are the best days and times. As well as an offer letter, creating an offer letter.

Determining the kind of benefits that you want to offer them because nowadays, there's a lot of competition out

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there and employees are looking to be with a company who can offer them not just great pay but what they're looking for is stability and really good benefits. So we would take a look at that and include that in your procedure.

Then how do we say no thank you to those candidates who didn't make the cut? So that would all be part of the procedure that I could help small business owners with.

David: Excellent, excellent. Carmen, for people who are listening and are thinking in their minds right now, "I could use this kind of help. I need to set this up." I will very gladly endorse you because I know you personally, you work with me, and I'm glad to bring people like you to our audience.

Your company is MyHRSpecialist.com, that's MyHRSpecialist.com. I know you've got information on that website. What sort of things could people glean from your website or are there any tools or resources or something they could look at in advance a little bit to get a better idea of all the things that you do?

Carmen: Yeah, sure. They can actually find some really great resources and tips on hiring and recruiting, performance management, but I'd love to offer your listeners one of my special reports. If they do go onto www.MyHRSpecialist.com they can just sign up and receive one of those special reports.

It could be on the benefits of having an employee handbook or employee versus contractor. Then interns, to pay or not to pay. Those are actually some of the topics that come up on a regular basis and definitely would love to offer that to them for free.

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David: Excellent. Thank you so much. Well, Carmen Torres, it's a pleasure. Thank you for being on the call. If you ever decide to quit your business, could I hire you?

Carmen: Yes. We'll have to talk about that later on down the road.
[Laughter]

David: I'm just kidding of course.

Carmen: Of course.

David: But, yeah, you bring a lot to the table that's really beneficial. I'll just say, you and I were talking a little bit before we started the podcast, but it's really foolish in so many ways for solopreneurs, small business owners, to think we need to do it all ourselves. I know we want to be conservative and quote "save money" but I promise you, anybody who's listening to this, find good people like Carmen and let them do what they do well so you can do what you do well.

They'll save you so much in time, money, potentially legal expenses if you do the wrong thing. It's a minefield out there today on both the hiring side and on the potential termination side as you said earlier, Carmen. There's no reason to get locked up in that or put you through the agony of that. So just work with good people. It's an investment. It's not an expense.

Carmen: That's right.

David: All right, well, Carmen, we'll do a follow up and go deeper on this because I think this is a subject that we really need to help our listeners with. So thank you for your time today. Thanks everyone, we'll see you next time on the podcast.

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