



Ezlaunch Worksheet

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Staffing & Culture Planner

Purpose of this worksheet

A strong team is your greatest asset. This worksheet helps you identify staffing needs, outline training plans, and create a culture that fosters loyalty, performance, and patient satisfaction.

1. Core Staffing Needs

List the roles essential for your practice at launch and determine your hiring priority for each on a scale of 1-5 (1=low priority, 5=high priority).

Role Title	Full-time or Part-time	Responsibilities Summary	Priority
(e.g.) Biller	Full-time	Submits claims, manages denials, handles patient balances and collections	4



2. What I Value in a Team Member

List the traits or soft-skills that matter most to you. Then rate how important each one is (1=nice to have, 5=essential).

Trait or Quality	Importance	Notes (Why it matters)
Teachable	5	Willingness to learn and adapt

3. Office Culture Snapshot

Use this section to help shape your ideal office culture.

- My ideal office vibe is:

Three ways I'll build strong relationships with staff:

1.

2.

3.

Three culture-busters I won't tolerate:

1.

2.

3.



4. Training & Cross-Training Plan

Role	Initial Training Focus Areas	Cross-Trained to Cover	Who Oversees?
<i>(e.g.) Medical Assistant</i>	<i>EMR system, biopsies, pathology call-backs</i>	<i>Front desk</i>	<i>Office Manager</i>



5. Culture & Retention Checklist

Use this list to keep your culture healthy and retention high. Add any important items to the list related to culture and retention that you want to keep the pulse on.

We hold regular team check-ins or huddles

I give praise and feedback regularly

Staff can share ideas without fear

I host one team-building activity each quarter

Our compensation is fair and transparent

I've created a written onboarding and training guide

I invite feedback via surveys or 360° reviews

Vendors and partners align with our values

