



## Roles and staff

Your Data Doctor team is composed of volunteers from your organization. It is important you find the right people for the job. Some roles are essential to successful Data Doctor practices regardless of size and some are only needed when you start to expand and scale across your organization. No matter what the role, search for individuals who are organized, self-managing, hard workers, and have both the skills and bandwidth to fulfill their role.

Below you will find descriptions of what each job entails. We've been sure to note which roles are essential and which are optional based on the size of your Data Doctor practice. We have also noted an example employee, from the example Skills Assessment in this toolkit, who fits the requirements of the role based on their skills assessment. Use the example Skills Assessment workbook for an example of what to look for when evaluating your potential staff.

### Chief of Staff

This person is the lead organizer for the Data Doctor practice. They are essential to practices of all sizes. Their job is to define the Data Doctor practice concept, select and implement technology, coordinate logistics (rooms, dates, times, and promotion), select and schedule staff, run the day-of practice, report on activity and use that data to develop the practice to the organization's needs and/or report insight gained from the data collected to organizational leadership.

In larger Data Doctor practices, some Chief of Staff share this leadership role in order to reduce the workload on a single person and foster a spirit of collaborative leadership.

### Front Desk

This person is essential to Data Doctor practices of all sizes. In smaller Data Doctor clinics, this individual generally manages the flow and operation of Data Doctor. In larger clinics, the Front Desk will work together with the Unit Coordinator(s) and Orderlies to ensure a smooth operational flow. Some examples of tasks that the Front Desk may perform include: assisting patients in scheduling, rescheduling, or canceling appointments; escorting patients to their Doctor. Though experience with Tableau products can be helpful in this role, it is typically not required.

**Example employee:** Cynthia Hooper or Jerry Markovic.

### Doctor

This person is essential to Data Doctor practices of all sizes. Doctors are assigned to a specific patient, either in advance or just before the appointment begins, based on their skillset and the patient's ailment. They listen to the patient's symptoms, research or test for solutions, and record their investigation or diagnosis for the patient and for Data Doctor practice reporting. Experience using and troubleshooting Tableau software is required for this role. Most Doctors have 1 – 2 years of experience with Tableau before they are prepared to be a Doctor.

**Example employee:** Maggie Doyle or Robert Romano.

### Attending



This person is optional for smaller Data Doctor practices and highly recommended for practices operating with more than 10 – 15 Doctors at the same time. The Attending is not assigned to any specific patient but makes rounds to provide additional assistance or consultation to Doctors. They are often subject matter experts in a particular Tableau feature or skillset such as visualization best practices, Level of Detail calculations, or permissions administration. In your organization, they may also be experts on your internal data sources, data structure, organizational structure, branding standards, etc.

**Example employee:** Kerry Weaver or Don Anspaugh.

## Unit Coordinator

This person is not required for smaller Data Doctor practices and recommended for practices operating with more than 10 – 15 Doctors at the same time. The Unit Coordinator is a communicator and floor manager who is responsible for ensuring that Doctors have everything they need to be successful and helping to keep appointments on time. They direct Attendings to Doctors needing aid, report technology and other issues to the Chief of Staff and provide time cues such as 5-minute warnings and Time is Up announcements. In larger practices or Data Doctor practices that are not using pre-scheduled appointments, the Unit Coordinator may work closely with the Front Desk and Orderlies to communicate which Doctors are not currently seeing patients and what types of issues they can address.

**Example employees:** Peter Benton or Cleo Finch.

## Orderly

This person is not required for smaller Data Doctor practices and recommended for practices operating with more than 10 – 15 Doctors at the same time or for practices operating in more than one conference room.

**Example employee:** Sam Taggart.