



Jay Geier is an entrepreneur, educational speaker, business coach and philanthropist. He is best known as the president and founder of the Scheduling Institute, the largest company in the world



offering dental office training and practice growth consulting to help dentists increase new-patient numbers, revenue collections and overall business success. Scheduling Institute also has won 11 consecutive Townie Choice Awards over the past seven years in the "Consultants and Advisors" category. For more information, go to schedulinginstitute.com.

What's Your M.O.?



The Scheduling Institute's Jay Geier trusts this test to find the **right fit** for new hires

Have you ever tried to fit a square peg into a round hole? I hope that we now all have enough common sense and life experience to know that will never work, literally. But figuratively, private practice owners do it all the time—most often when hiring team members.

How often have you regretted a hire shortly after she starts? Even if she had the right skills for the job, maybe she lacked efficiency and productivity. Instead of addressing the disconnect, though, you looked the other way and became frustrated but unsure how to deal with it. If you repeat this pattern hire after hire, soon you'll feel like you're on the Island of Misfit Toys, with a practice full of stressed-out, inefficient team members and dwindling profits.



The Kolbe assessment isn't about whether you're capable of getting something done; it's about how you get it done when you have the freedom to do it your way.

What if I told you that you might be able to bypass these common frustrations by knowing a particular trait of that new hire? Their M.O., *modus operandi*, determines *how* they do *what* they do every day—how they handle deadlines, employee relationships and new challenges, and even their tendency to accept (or fight) big changes in life. Each of your team members has his or her own personal M.O., and they all interact on a daily basis.

Identifying your strong suits

Several years ago I learned of a tool that sees straight through people's skills and intelligence to their M.O. The Kolbe assessment doesn't have anything to do with how smart, sociable or capable you are; it just reveals how you naturally operate within four critical areas:

Fact Finder: The instinctive way you gather and share information.

Follow Thru: The instinctive way you arrange and design.

Quick Start: The instinctive way you deal with risk and uncertainty.

Implementor: The instinctive way you handle space and tangibles.

The assessment results are the combination of your ratings in each area, scored on a 1-to-10 scale. It's important to note that a rating of 1 does not translate to a poor score. Because each definition focuses on *how* you complete a task, not *if*; a low number just represents a different strength within that area. In fact, every single component of your Kolbe score is positive. It's not about whether you're capable of getting something done; it's about how you get it done when you have the freedom to do it your way.

For example: If Person A is a 1 in the Fact Finder category, she's able to simplify a large amount of information and summarize the message—generally able to make a decision without gathering a ton of details. If Person B is a 9 in the Fact Finder category, she likes to have all of the details before she makes a decision, so she reads through the same information in depth. She may even research something she's read or ask additional questions to make sure she hasn't missed anything. Her explanation of the key messages is thorough, lengthy and complex.

Each woman has a totally different M.O. Neither is "better"—each has its unique advantages—and they might even still

reach exactly the same conclusion. Their scores just unlock how they do what they do, and why.

Playing to each person's strengths

You make unconscious decisions based on your M.O. every single day, and the success of your practice depends on your understanding and leveraging these unconscious decisions. I can almost guarantee that you and your team are spending hundreds of hours per month on tasks that don't come naturally or are better suited for someone with different strengths.

This isn't just a waste of natural potential—it's a money drain. For instance, I'm a high Quick Start and a low Fact Finder, which means I get excited about big ideas, make decisions quickly and move on without gathering tons of detailed information. While this M.O. has allowed me to create my company, reach seemingly "impossible" goals and multitask among various projects, it also means that I let details (such as meetings and phone calls) slip through the cracks. Once I saw my Kolbe score and began to understand this fact, I made sure that I hired people close to me whose Kolbe

Basic Type-ography

When we understand why we do what we do, it relieves the stress of having to explain ourselves. Here's a quick rundown of the Kolbe assessment categories and characteristics for each. Where do your strengths fall?



You might be a high **Fact Finder** if:

- You use Yelp or research in depth before going somewhere or buying something.
- If you ask a lot of questions.
- You need a lot of details before starting a project.



You might be a high **Follow Thru** if:

- You make a shopping list before going to the grocery store.
- You're sometimes referred to as having "OCD."
- You organize your clothing by color.



You might be a high **Quick Start** if:

- You are a visionary.
- You try new things without any hesitation.
- You're able to improvise when giving presentations.



You might be a high **Implementor** if:

- You're able to read and interpret body language.
- You fix things around the house rather than calling someone to do it for you.
- You're able to build things from scratch.

assessments provide balance to mine. Those people are some of my most valuable assets; they complement my strengths and help me to stay on schedule and on task.

Now let's talk about you and your team. Understanding the way they operate will allow you to maximize their strengths and leverage your greatest asset and unlock your full human capital potential. Translation? More money for you, more money for your team, more money for your practice.

Here's what a few Townies had to say:

- "I'm a high Quick Start and prefer information via bullets," says Dr. Joe Maio of Apex Dental in Murray, Utah. "So when I would get long, detailed emails from my office manager, I'd simply ignore them. They were too much. She would then get

mad at me for not responding, and the tension would trickle down into all of our interactions."

- "This training has helped our team members work out issues that have been a problem for a long time." — Dr. Travis Hunsaker of Salem, Oregon
- "I saw a lot of value in how Kolbe will help me adjust to how I train team members," says Rachel, a team leader in Dr. Mark Lowe's office in Fresno, California. "Knowing their scores is extremely beneficial to understanding your team ... and adapting techniques to benefit each individual."

Understanding your employees' M.O.s provides a whole slew of benefits to your practice. It will:

- Reduce stress that leads to costly turnover.
- Diagnose human capital problems and provide practical solutions.
- Improve team communication.
- Reduce team conflict that leads to loss of productivity.
- Increase efficiency by having the right people in the right roles.
- Help team leaders maximize delegation.
- Help team leaders to become more effective

Reading the signs

Understanding the Kolbe assessment can also help you look for signs during patient interactions so that you can understand each person's M.O. and use that knowledge

How Jay Geier Develops Talent, in 7 Steps



Your human capital is your greatest asset. Are you maximizing or wasting this asset? Jay Geier of the Scheduling Institute uses this checklist as a guideline for assessing his team and helping team members to step into new responsibilities, roles and opportunities.



GAUGE ATTITUDE

"I'm always going to test a team member's attitude first. If someone has a negative attitude, that's generally my 'stopping point.' However, I will go to employees, directly address their bad attitude, and give them a small window of time to fix it."



COLLECT PERSONAL EXPERIENCES (MINE AND OTHERS')

"I'll look back on previous experiences with team members and assess: Do they consistently deliver, or do they consistently drop the ball? Then, I'll ask their co-workers the same question. Is this a person who follows through and gets things done? These answers can be eye-opening."



PERFORM ASSESSMENTS

"The Kolbe assessment helps me to understand each team member's 'balcony' and their 'basement'—his or her strengths and opportunities for growth. Another assessment, StrengthsFinder, shows me the areas where each person naturally excels. Together, these two assessments provide me with crucial insight."

MATCH OPPORTUNITY TO TALENT



"Now that I've gained some intel on my employees, I'm equipped to match my opportunities to my talent. This can be tricky, but it's also the best way to maximize your biggest asset. When an opportunity comes along, ask yourself, 'Whose skills and strengths are best suited for this opportunity?'"



CREATE THE "SELL"

"Once I've identified the perfect match for the opportunity, I create a presentation. Now, I'm looking for a 'buy.' A rookie mistake would be *telling* people about the opportunity, instead of *selling* it to them. Don't make that mistake."



SEE IF THEY BUY IT

"After the 'sell' I'll have a few important questions for my team members. Do you get it? Do you want it? Do you have the capacity to do it? Even if they seem like the perfect fit, they may not currently have the capacity to do it. If they already have too much on their plate, this is the time to find out."



ENCOURAGE, TRACK AND MANAGE

"This final step is 90 percent of the entire process. So far, you've assessed your team members and matched them to the opportunities. Now you must ensure they get the job done and deliver maximum value; this requires encouragement, tracking and ongoing management. This part of the process generally contains a lot of ups and downs, so don't be discouraged by the lows. Use them as opportunities to learn and grow your team."

to create a customer-centric experience. For example, if a new patient asks a lot of questions on the phone, she's probably a high Fact Finder—meaning she will want all the available details and information before making a decision. Patients who are high Implementors will benefit from a tangible experience; bringing them into the office to touch props or models will help them fully understand the treatment they need.

It's worth noting that there is no "best" Kolbe score for a given position; the ideal score for, say, a hygienist at your practice may be different than the ideal score for a hygienist at another office, depending upon the expectations of the practice leader.

The key is to recognize where the individual's strengths fall, and to put him or her in a role that requires more of what suits them. For example, you don't want to put a high Quick Start in a role that

requires long-term attention or details, like in research or data collection.

The bottom line

Like it or not, if you own a private practice you're in the people business. And people will always be a challenge. But when you can finally understand why they do what they do and what makes them tick, you can replace many of those challenges with productivity, efficiency and results.

If what you've been doing isn't getting you to where you want to be, it's time to try something new. Rather than continuing to function on autopilot, why not take the next

step to success by decoding your and your team's M.O.s? Kolbe is a great start to building a dream team from the people you already have and preventing yourself from wasting anymore time or money on bad candidates.

We've seen through countless client experiences the trickle-down effect of a good or a bad team. A good team is happy, engaged, coachable and a valuable asset to your practice. It directly affects your new-patient numbers, collections and productivity. The better you know your team members, develop their skills and have them in the right spots, the better your numbers—and stress levels—will be. ■



Quick Starters: Jump in now! (Fact Finders: Gather more info)

The Kolbe Corp. offers several assessments, including the Kolbe "A" that Jay Geier discusses in this article. To learn more, go to kolbe.com.



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