



## SEASON 2, EPISODE 14

### IMPROVING HOW YOU WORK WITH YOUR PEOPLE WITH FRANK MASELLI

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David Mandell:

Hello, this is David Mandell, host of the podcast. Welcome to today's program. I'm excited about today's guest. He's somebody that has worked with OJM and I've heard him speak and I've read his books and really interesting stuff, especially for all of you physician listeners who play some management role. And I think that's probably most of you. You have employees in your practice. You have a team around you, whether it's in the OR or in front of the waiting room or somewhere in the practice. So this stuff is really relevant for you and it's been helpful for our team at OJM. So I think you're going to get a lot out of it. So let me tell you about Frank Maselli and then we will bring him on.

Frank Maselli is a three-time bestselling author and award winning keynote speaker across the country. He's a former US Army officer and three decade veteran of the profession. Frank has been an advisor, a top branch manager, and the executive vice president it for one of the largest and most successful asset management firms in the world.

Frank has trained tens of thousands of employers. His expertise covers a broad range of skills but he is most renowned for his work on modern marketing, client psychology, and advanced present. His programs are cutting edge, exciting, and his delivery is mind blowing. And I would tell you that is true. So with that, Frank, welcome to the program.

Frank Maselli:

Thank you, David. Mind blowing. I love that phrase. That's so good.

David Mandell:

Exactly. When you came and worked with us after we'd seen you speak, I just thought it was so interesting. I am interested in psychology and why people do things the way they do and how to get the most out of your people. And that is something I think a lot of physicians struggle with day to day because, what we're going to talk about, I think we can guarantee that they don't cover this in medical school or in fellowship or any kind of medical training. So all of a sudden these docs come out and they have to deal with people which we can't avoid in what we do, and



they have no training in it. So hopefully they can learn a couple nuggets today and maybe even find some interest to go down a more in-depth path.

Frank Maselli:

Sure.

David Mandell:

So before we get into some of that, tell us first about your professional background beyond the short bio and how do you help businesses today, including potentially medical practices.

Frank Maselli:

Sure. My background is lengthy, I've been around a long time. I started in the military after college and I ended up getting a doctorate in psychology and that's become my specialty. And I try to weave psychology, I agree with you, I think psychology is the underlying driver behind everything we do and how we succeed professionally. I ended up going to Wall Street, been on Wall Street for about 40 years now. And so much of that is numbers related, but the heart of it is the heart and the mind of clients, how we make decisions, how we make good and bad decisions.

I became a manager fairly quickly in my career and as leaders, we're challenged. Being a manager, being a leader of a team, whether it's a large team or a small team, that's tremendously emotion driven, and those skills are not taught.

They're taught a lot in the military, but strangely enough, the military's a very advanced leadership training, proving ground. Most people don't understand that. They think of the movies and they think of Patton yelling and screaming but it's not like that at all.

Anyway, long story short, that's been my background. I try to help people now understand some of the depth behind leadership and management and how to dig a little further with their people and how to understand what motivates and inspires their people. So it's kind of fun.

David Mandell:

That's great. And we've had a number of physicians with military backgrounds training in our podcast actually. And it is funny that I think, especially when Matt Provencher was on and I'm thinking, Jen, also, they talked about how what they learned in terms of leadership and working in a team as part of what they took away. That's not surprising that you'd mentioned that.

Let's talk about the value of using an assessment test when you think about hiring and managing a team. Some people have probably heard about this all the way back from what color is my parachute when they start their career or something like that,



but give us sort of broad 30,000 foot view of assessment tests, what you think of them and how they can be used.

Frank Maselli:

I have a love/hate relationship with assessment tests. And I think a lot of people do. I think they sometimes can scare folks and there's so much misunderstanding about assessment tests. I recommend some of them specifically for managers, for leaders, to get a better handle on their people, what makes their people tick? We talked about this certainly in our meeting but there are many, many hundreds of assessment tests. There's a handful of them that I think really do help but you've got to understand them. The benefit of an assessment, very simply, there's two real benefits. First of all, it kind of quantifies some of the behaviors that people exhibit on the job and in life in general, personality behaviors, instinctive behavior, knowledge. So the quantification is important, but the second benefit is that it helps the leader or the manager take the interview process out of that natural communication thing where we all want to be impressed and impressive, and people have learned how to interview really, really well.

Anybody that doesn't give a good interview is just not prepared today. You want to get deeper than the interview. You want to get beyond the fluff and beyond what the resume says. And that's where assessment tests can help because it really does put a spotlight on certain issues. So I use them for those two reasons to help the manager quantify and to dig beyond the nonsense that comes out, because people know what to say. They know what to say on a job interview. Then suddenly six months later, you've got a completely different person in front of you and you're wondering what the heck happened to this person. So it's funny we cut through that nonsense.

David Mandell:

I know we've talked about this before but explain to the audience what is the three part mind and how does that show up in a workplace environment?

Frank Maselli:

Yes, that's a fascinating concept. This is something I learned many years ago from a brilliant woman named Kathy Kolbe. We'll talk about her in a second, but the three part mind is basically, there are three elements. I try to think of it in terms of an iceberg. If you picture an iceberg, the very top of the iceberg, the part that you can see from 50 miles away, that's knowledge, that's very fleeting, it's stuff that you learn, it's stuff that's acquired quickly and sometimes dispersed quickly. The middle of the iceberg still above the water level is personality. So knowledge and personality are both above the water level. Personality, our desires, emotions, how you feel



about certain things, your values and your beliefs. Below the water line is the third part of the mind.

And this is the part that fascinated the heck out of me and it's really become a driver for many of the things that I teach. Below the water line are instinctive behaviors. These are hardwired characteristics that are formed very, very early in life, some say from birth, some say from early childhood. They end up being permanent attributes or behaviors or characteristics that the person carries with them their entire life. That's where I try to spend the majority of my time in coaching managers and leaders to help them understand the behaviors, not the desires. People don't always do what they know how to do or what they want to do. They very often do what they're driven to do internally and those behaviors manifest, regardless of knowledge, in many cases or personalities. So those are three parts, personality, knowledge, and then instinctive behaviors. And we want to get below the water line with your employees as fast as you can.

David Mandell:

Because the concern is by understanding those kind of instinctive drives that you'll be able to better predict what kind of behavior they'll have or what position would fit that kind of instinct in a good way.

Frank Maselli:

That's exactly correct. Yeah. It's all those things. What kind of person are you dealing with? How will they handle the job that they've been given? Not so much a question of are they the right person for the job, but how will they best succeed on that job? I very rarely use instincts as the final determinant as to who to hire for specific job. What I use it more for is coaching people who are on a job already.

David Mandell:

Yeah.

Frank Maselli:

And I would say, "Let's find the best way for you to succeed in that role and for things for me to do to coach you in that role, how should I manage you?" I'm a big believer in managing everybody different. We talk a lot about this in the military. We treat people with fairness but everyone is unique. We have to learn how to lead and manage each individual according to their needs, not according to our needs.

You're absolutely right. It's designed for fit. It's designed for performance. It's designed for also for failure. When you have somebody who's struggling, you want to know why and maybe how that can be corrected, if it can be corrected. In some cases it may not be correctable, frankly, but instincts will drive you toward that solution, I think.



David Mandell:

So you mentioned Mary Kolbe, right?

Frank Maselli:

Kathy Kolbe.

David Mandell:

Kathy Kolbe. My mistake. I know this is something that we, we'll get into this at OJM, partook in. She developed a test that you work with, a sort of index measure. Tell us a little bit about that.

Frank Maselli:

Yeah. It's, it's actually called the Kolbe A Index. K-O-L-B-E. Kathy's just unbelievable genius. She basically came to the conclusion many, many years ago that personality and knowledge were not enough to define a human's performance. There had to be something else. She developed a very simple but powerful test called the A Index and it identifies a person's instinctive, natural strengths and behaviors in four categories.

The first category is called fact finder, which is how a person processes information, how they take in information, how they give out information. Second category is called follow through, which is how a person deals with structure and organization and discipline. Third category is called quick start, which is how an individual deals with changing situations, new ideas and innovation. And the fourth category is called implementer, which is how a person interacts with the physical environment. This is fascinating because in my profession, in the financial world, we get very, very few implementers.

David Mandell:

Yeah.

Frank Maselli:

But in the general population, there's a huge dispersion of implementers, physical people, dancers, artists, architects, construction folks, carpenters, that kind of stuff.

David Mandell:

Right.

Frank Maselli:

It's a fascinating instinctive pattern.



David Mandell:

This has been a couple years. I remember one of the things that really I took away from what we did was, we all did the test at OJM group and it was really interesting, but also comforting that we all came out, pretty much, we were like 90% fact finder bias. I know it's not all one or the other but each of us like myself, we were all, as a marketing person, I was thinking, how could we market that because what you want someone managing your assets or someone managing your health, you want somebody who looks at evidence. You want somebody who's conservative that way, that goes with what the data shows that doesn't get too emotional.

Isn't going to jump on every new idea. Which I think a lot of clients would love to know, "Oh, these people, their instinct is actually pretty conservative or balanced or evidence based, et cetera." I would like to know that about my lawyer or physician or money manager.

It's hard to get that word out, but that was very comforting for us, but it was interesting. And then there were a couple folks on our that we're a little bit biased one way, but I do remember, I don't think we had any physical people on our team which wasn't surprising giving what we do. I found that to be really fascinating.

Tell us your thoughts on that or what you remember, without any details, but is that kind of a typical analysis you go through with a small firm to kind of do the tests on all the key people and then talk about what we have to look out for that.

Frank Maselli:

Yeah. That's exactly what we do. We have the entire team take the test and then we do a quick in depth analysis as much as they can handle. But your team was very homogeneous. You had a lot of the fact finder, you had quite a bit of follow through, very little quick start and virtually no implementer. Not uncommon. That's fine. By the way, this is important, there is no good or bad Kolbe score.

There's no high or low. There's no good or bad. They're all good. It's just knowing what your score is, that's the most important thing. But to have a team that's homogeneous especially in fact finder means you're going to have a very high degree of accuracy, precision, analytics, thoughtfulness.

The challenge with a team like that may come in the communication mode, where no one on the team naturally simplifies concepts. They all make things more complicated perhaps than necessary, or maybe analysis paralysis. You've heard that expression. People overthink things and they want more data, better data, more accurate data, more up to date data. You can find an organization like that sometimes, or a team like that, gets paralyzed. They get frozen with an inability to make decisions. Making decisions quickly, that's a quick start instinct.

David Mandell:

We have one of those on our team. So yeah.



Frank Maselli:

Do you, all right. Was that you, David?

David Mandell:

I don't want to name names, but we have one who is pretty high on that. Yeah. That balances us out a bit though, which is good. Right? Because we don't want the analysis paralysis. And again, like you said, our numbers weren't, I think it's a 10 scale, it wasn't like 10 zero, right? It was balanced towards or leaning towards analysis, but not paralysis, ideally.

Frank Maselli:

Not paralysis, no, no. And that quick start would be the one in the group that says, "Okay guys, we've overthought this. Let's just take some action. Let's make a decision."

David Mandell:

Right.

Frank Maselli:

Quick starts like to make decisions.

David Mandell:

Right.

Frank Maselli:

And adjust on the fly, which is kind of an interesting trait as well.

David Mandell:

Right.

Frank Maselli:

But there is a need in an organization for almost every one of these instincts and in an ideal world it would be a balanced team but it doesn't work that way. Knowing is more important than the numbers themselves. It's fascinating.

David Mandell:

It's really interesting and we could talk about this the whole time. I loved what we did on that and I think we had a couple people that were kind of even across the board, they were almost in the middle, on of the categories, which is a unique position in its own right.



Frank Maselli:

That's a fascinating set of scores, Kolbe calls those mediators or facilitators. That's a person who can parachute into any team, into any situation, and be instinctively comfortable and effective in that group. It's a really great, great, I don't want to use that perfective term, but it's a very useful skillset.

David Mandell:

Yeah, exactly. I think we had one of those too. How does this test, the Kolbe A Index measure, how does that relate to other tests like what people have heard like Myers Briggs or IQ or some of these other tests out there? Obviously we were already talking about how it's a little bit different, but give us some specifics around it.

Frank Maselli:

Well, again, the Kolbe is the only test that measures that third part of the mind, that under the water instinctive levels. So the Myers Briggs, the disc, the Enneagram, strengths finders, predictive index, these tests are what they call affective tests, which is personality. Affective is a loose word for personality. 99% of the tests out there are personality tests, which are important. And I think a Myers Briggs is a very useful set of scores to understand and to know what's what drives somebody on a personality level.

But think about this, one of the measures that we use is persistency of test scores. One of the things that we identify as what's called test retest validity. So a person takes an assessment test. They wait a certain period of time. They take the same test again. How do the scores compare over that time period?

The Myers Briggs has a 40% retest validity over four weeks. What does that mean? You take a test today. You take it a month later, you've got a 60% chance of getting different scores on the Myers Briggs. And that's the most popular personality test in the world. That's a very fleeting number. Your personality can shift over time.

The Kolbe has a 90% test retest validity over 10 years. We're identifying permanent, hardwired characteristics. The totality of the individual are those three parts of the mind. So you don't want to just identify one element of the individual. You want to identify as much as you can. So, the combination of knowledge, personality and instincts is what gives you as much information as you can possibly get from assessment tests.

David Mandell:

Yeah, make makes sense and one of the reasons we thought it was so important to do that. It sounds like, the instinctive, within a range, that's pretty set. Like you said, kind of hard wire, where personality might depend on your mood that day, how things went that week. Not completely, not a hundred percent, but you may be a



little more positive one week versus another and that may show up in that kind of test. Is that kind of what you're saying?

Frank Maselli:

That's absolutely correct. Personality can be affected by so many forces and I'll give you a great example. Think about how the national personality has shifted over the last 24 months. If you think about just the optimism level in our country and we could spend days talking about this, but things have shifted quite a bit. Things shifted for America dramatically. Personality took a dramatic shift after 9/11.

David Mandell:

Yeah.

Frank Maselli:

It was a big shock to our system.

David Mandell:

Yeah.

Frank Maselli:

Bottom line is, you need to know more than that, but the Kolbe is not affected by external forces. It's purely an internal driver and that's where the power is. I don't want to oversell this concept, but the power is knowing what that person will default to all the time.

David Mandell:

Right.

Frank Maselli:

Because they can't escape those instincts, those instincts don't change and they always manifest.

David Mandell:

Talked a little about tools, now let's talk a little bit about implementing or using those. So big picture, this is a broad question, but how can you go about hiring the right person for the job? How do you take that? That's a big challenge.

Frank Maselli:



Yeah, it is and it's very, very costly to hire the wrong person. Costly not only dollars, but in terms of emotional investment and time. Time, I mean, good God. So you want to make the best hiring decisions you can and I try to use the assessment tests to help that process. Obviously with experience, you kind of get a good sense of what people can deliver, but this gives me some concrete. This gives me something solid to think about.

A simple example, if I'm hiring an administrative assistant for my office, I know what that job requires. That job requires somebody who's focused detail, who dots the Is and cross the Ts, who doesn't let things go out with typos on them, who follows up on information and gets accurate information before they tell something to a client.

In Kolbe land, I know that I'm looking for a fact finder follow through. I don't necessarily need a quick start in that role. A quick start is somebody who's going to say, "Oh, you know what, don't worry about the numbers, just make them up."

David Mandell:

Yeah.

Frank Maselli:

I laugh about that because that's my number, I'm a 10 in quick start, which is just a terrifying number to be a financial professional. Because when a client would ask me a question, I would say, "Oh, who the heck cares? Don't worry about that."

That's not a good thing. So what you want to do is you want to assess what the role you're hiring for requires. What do you believe as the boss that job requires? And then you want to match those behaviors up with the individual's instinctive strengths. There's a test process that you in Kolbe, the A, the B and the C, different tests for the boss to take, the leader, the manager, and then the individual takes the A. It's a process, but you know, it's very, very powerful. What it prevents is those people that you hire because you like them or because they remind you of somebody or because they interview really well and then three, six months later, you're going, "Oh my God, what a mistake this was." Today it's almost impossible to transition someone out of a role.

David Mandell:

Right, right.

Frank Maselli:

Very challenging. So you want to do the right job upfront.

David Mandell:



Absolutely, and I think if docs are listening to this, there's staff of course, which is crucial. Medical practice is really only as good as it's staff to some degree. Obviously you want great physicians giving great care, but as a consumer of health, if the staff is not good in just in terms of getting things done or getting the prescription out or following up and things like that, you have malpractice issues, you also just have people not being happy and then putting up bad reviews on Google. It drives docs crazy. They're like, 'Hey, I'm doing a good job for my patients but I'm getting bad reviews.'"

Well, maybe because of everybody but you. It really does reflect the practice. But the other thing I was just thinking about too, is hiring in new docs. That's potential partners and when those things don't work out, and there's so much turnover in medicine, especially in the first five years, the numbers are pretty high. Part of that is I think, the young docs coming out not really knowing what they're getting into. There's a venture I'm working on with a couple of surgeons to hopefully improve that. But it also could be not hiring the right fit on the employer side too. Bringing in the wrong doc, even though they might be a great physician or well trained, it's not a fit for this particular practice. [crosstalk 00:24:33] thoughts on that?

Frank Maselli:

No, no, no. You're touching on something that's very critical. And I've worked with a lot of doctors. I was in the Army Medical Service Corps, which we interface with physicians every day, and I can't think of a more challenging profession than that quite frankly. But your point being that when you create a team, you want a good fit on that team because a bad fit, especially among partners, especially among professionals who are relative equals, can be an absolute nightmare. If you're going into the office every day dreading seeing your partner, that's a formula for easy destruction right there.

David Mandell:

Yeah, right. It's not like if you have a staff member, you could fire them. There are certainly legal issues, this is not legal advice, but there is a way to eventually do that with performing, et cetera, in most cases, but you can't always fire your partner. Again, if there's egregious issues of course. But just because they're just not a fit and make your life a living hell, that's not probably in the documents too often.

Frank Maselli:

My theory is why go through that had pain?

David Mandell:

No, exactly, an ounce of prevention. That's the whole thing, right? That's why we're talking here. That's why I want people to listen.



Frank Maselli:

And by the way, not to interject, but if you have client-facing staff people, that's a critical role. Your organization is represented a lot of times by many other people besides the physician.

David Mandell:

Right.

Frank Maselli:

So those client-facing people need certain skills as well that are pretty advanced.

David Mandell:

That's exactly what I was trying to say. Exactly right. Oftentimes they're the ones that make the difference between a good experience and a poor experience for the patient, is the staff that are facing.

How do the instincts come in? Let's say, the team is hired, let's say we're not looking to hire anybody new, we have our team, in terms of coaching and improving performance, you've got somebody, you're not looking to fill a new position, but you know things could be better. You don't really want to start again and terminate and go out and find somebody, when you come in, what's your process and how do these tools help you to coach and improve performance with an existing team?

Frank Maselli:

Great question. Because you really don't want to make wholesale changes unnecessarily. It's better to take the people you have and to coach them into a better performing existence on the team, more functional and better enjoyment. We try to identify the roles that have been established. We look at the instinctive strengths, look at the other aspects of the individual. And then we will make certain suggestions from a training perspective in terms of skills. If skills are the problem that's the easiest thing to fix generally. Training can solve that.

If instinctive mismatches are the challenge, we have a couple of choices right there. The first choice is to say to the person, "Hey, you know what? This is your job, gut it up, do it anyway." That's not the ideal choice. The ideal choice is to somehow tweak the role or the way the role is implemented on the team to make it more in line with the person's natural strengths.

Simple example, if I have somebody whose job is to do a lot of research and to make sure numbers are accurate and precise, but they have very little fact finder and follow through, what I would do to that person is I'd say, "Listen, I don't need you to do research all day long, but what I do need is I need a short amount, a burst of



intense research every hour. I need you to do 10 minutes an hour on certain functions that you're not happy with."

That may be a minor change but that person's not, during the course of the day, they're not doing 60 minutes of hard work. They're goofing off. They're ruining the entire day. If I can get 60 minutes of productive research out of a person that would be a big, big and improvement on the team, but I'm going to get it in smaller increments.

David Mandell:

Right.

Frank Maselli:

For somebody whose job description is fixed and cannot be flexed in any way, I would begin to flex some of the terms of how that job is implemented for that individual. I would coach them to change the way they approach the job. I know this sounds a little complicated, but if I don't want to get rid of them, which is probably my last choice, then I want to help them do their job better in a way that fits their natural strengths better. Often those are very minor changes in the person's world. So, with minor tweaks, we can dramatically improve the performance of people on the team. It's really fun to watch the way that happens on a team. It's very exciting.

David Mandell:

My guess would be not only are you getting some more productivity out of it, but you're also getting some more buy-in from the employee, because you're making an effort to understand them and carve around or be flexible for their benefit. I think people would appreciate that. Even if it's still not their core sort of instinct, they'll be willing to gut it out a little bit because you're also giving a little bit on your end in terms of the role.

Frank Maselli:

Yeah, and you use the critical word there, flexibility. Leadership flexibility is very, very important and frankly, it's an advanced skill that not everybody learns.

They learn that leaders have to be very didactic and dictatorial and that doesn't work anymore. The other aspect too, which we sometimes get into, is reward systems. If I know that somebody has a very, very difficult job that doesn't align with their natural strengths, I know they're in pain, but the job has to get done, I might construct a different reward system for that individual. A different compensation plan, a different time off plan.



David Mandell:

Right.

Frank Maselli:

For example, if I have an implementer on my team, which is that physical instinct, and that person needs to take a two hour lunch so they can go to the gym, I'm okay with that. They're much more productive than sitting at the desk all day long. That's a very challenging one to deal with, but it's also a pretty easy fix if you've got something like that. So once we know what the person's all about, then we can make customized changes for the team that really enhance performance.

David Mandell:

Got it. Last question. This is sort of looking at the leader themselves. So now we're talking about the doc, the manager, et cetera, themselves, how critical is it, and I thought it was, and I'll just put my two cents in, I thought it was so interesting and critical for us to do it and for me to do it for myself, but how important is for these folks to do the test themselves and understand where they're coming from and what their own instincts are? Is that step number one typically? Tell us about that.

Frank Maselli:

Yeah, that's step zero. We start with that before we even talk to the group, we have the leadership team take the assessment. That does a few things. First of all, it tells me what kind of challenges we're going to have in terms of implementing change on the team. And secondly, it helps me understand how best to communicate with that leader. It's absolutely life and death essential for the leader to understand their natural strengths before we can go into the team.

David Mandell:

Yeah.

Frank Maselli:

It's so it's so valuable to understand what makes that leader work. It wouldn't surprise you at all to know that sometimes people hire people who are exactly like themselves. That's not always the best function for a team. But you're right, the short answer is the leader has to do it and often we do it first before we even agree to a consult.

David Mandell:

Makes sense. I really enjoy doing it. And for all the listeners out there, this is a topic that you may not have thought about a before. You probably thought about headaches that your team's given you. We all do that. Because we got to deal with



people. But in terms of what do I do about it other than hiring, firing. How to get a little bit deeper, how to get a little bit more thoughtful and not make the same mistakes over and over as leaders and how to be even more productive and more harmonious.

This kind of tool and this kind of expertise that Frank has, I really encourage you folks to think about this kind of assessment and diagnostic your own practice. So Frank, in sort of our last question, if docs were interested, what resources do you have, obviously will put your bio and your email in the show notes so that they can get ahold of you, but what are the kind of things that you would tell them to take as a next step to get educated? How do you work with folks?

Frank Maselli:

I work in a very customized way with my teams. There is no formula, there's no Maselli program that they have to ascribe to. It's completely customized. Just reach out to me, shoot me an email, pick up the phone and we can talk. Every team's a little different and I try to blend my style with theirs and find the best approach.

Just shoot me an email and we can talk and figure out what your challenges are and what your needs are. I do this every day. It's a deep passion of mine helping people succeed like this.

David Mandell:

For sure. We're out there looking to hire somebody potentially at OJM and we're certainly going to use some of these tools to make the right decision or the best decision we can make.

Frank Maselli:

That's great.

David Mandell:

Yep. Frank, thanks so much for being on. I think this is great. I hope everybody learned some things and I'm sure they did. And with that, I ask all the listeners tune in again every two weeks and tell all your friends. Thanks.

Frank Maselli:

Thanks, David, take care.