

Speaker Packet



Creating Balance in Your Business.

Tired of dealing with the *effects* of poor management,
but not sure exactly what needs to change?

Acquire the skills to more effectively manage the Hiring,
Management, and Conflict Resolution processes.



Creating Balance
in Your Business.

Through interactive, dynamic presentations, **Leigh Olson**, *strategic placement and practice management consultant*, and **Judy Holmes**, *litigation and employment attorney*, weave both the *objective* legal and the *subjective* practice management sides together creating programs that are truly unique. By implementing their management approach, employers often **see a dramatic drop in employee turnover, a significant improvement in morale, and a positive effect on the "bottom line."**

Gain the tools, processes and resources required to *master team management*: from recruiting and hiring, to discipline and effective conflict resolution. Through real-life case studies, live demonstrations, small group exercises, and a variety of presentation formats, Leigh and Judy create a high-energy, entertaining learning experience.

Invite Leigh and Judy to your next meeting and see for yourself why their seminars and workshops are frequently described as **"engaging, fun and lively with real take-home value."**

PRESENTATIONS:

Mastering **Performance**
and **Productivity**:
Learn How Personality Styles
Make Your Office Tick

Understanding individual personality traits is a key component of creating a healthy, productive work environment. This workshop will give you new insight into how personality styles shape your office culture. Learn how to become a more effective communicator and develop ways to tap into each individual's strengths and problem-solving styles. Learn management strategies to motivate your team, decrease conflict, and increase productivity.

Mastering the **Hiring Process**:
Hiring Right the First Time

Explore the importance of 'fit' when determining which candidate will be successful as an employee. Discuss the personality traits you will encounter when interviewing job candidates and how each either support or weaken the practice values and vision. Discuss the employment law basics every practice owner and manager must know. Learn how to conduct lawful interviews and make important hiring decisions.

Mastering the **Management**
Process: Lawful, Effective
Evaluations and (Nearly) Painless
Discipline and Termination

Termination of an employee is sometimes necessary, rarely easy, and always costly. Every effort should be made to minimize the need to discharge an employee by maximizing every employee's ability to succeed. This workshop will focus on effective management strategies to help you manage your team within the law. Learn how to develop and implement effective management techniques to build a dynamic, positive work environment.

Mastering Workplace **Conflict**:
Keeping Your Practice a
Battle-Free Zone

Identify the legal land mines to avoid when dealing with workplace conflict. Learn management responses that can be considered unlawful discrimination and harassment, and explore ways to minimize liability for actions taken by you and your management team. Explore conflict resolution techniques that work best with your practice and with each employee type.

*Courses are approved for CE credit in the state of Colorado by the
Colorado Dental Association, an ADA CERP provider.*

ADA CERP® | Continuing Education
Recognition Program



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Mastering Performance and Productivity:

Learn How Personality Styles Make Your Office Tick



We can't begin to understand others if we don't understand ourselves.



Our personality style affects everything we do. Not only how we *approach* our job as a manager, business owner, and team member, but also on how effectively we interact with the personalities and traits of those we work with and depend upon for the overall success of the organization.

Your personality shapes your management style. Whether you are a take charge person, or more laid back. Perhaps you avoid conflict whenever possible. You may be detail oriented or focus on the big picture. Do you juggle many tasks or prefer to handle one at a time? Similarly, we can identify personality types among those we work with: Those who enjoy recognition and approval and don't take criticism well, some who work well in groups and some who don't, etc.

This workshop will give you a fresh **new** look into understanding personality traits and management styles utilizing **Professional Dynametric Programs (PDP)**, a worldwide leader in behavioral assessments solutions). Learn to identify, assess and develop strategies to resolve challenges and misunderstandings with the different personalities that you encounter and provide clarifying focus and understanding.

Learning Objectives:

- Learn to identify personality types and traits and how they affect how we communicate, work with others, react to situations, and fit within an organization or team.
- Gain an understanding of your individual ProScan (personality evaluation) and what it says about you.
- Discover how to identify and effectively channel strengths, weaknesses, motivators and "Demotivators".
- Develop the tools needed to build a positive workplace culture based on communication and respect.
- Determine why certain team members clash and how an understanding of personality traits helps resolve conflicts.
- Know how to use personality styles and traits to hire the right individuals for each job.
- Recognize how to build a successful team and create an effective management style.
- Understand how to assess what each personality type needs from you to maximize productivity and job satisfaction.

Objective Elements:

Examine the lawful use of personality testing in recruiting, hiring, and managing employees. Attendees will learn the importance of utilizing valid personality tests, and the legal risks employers face when implementing inappropriate personality testing. We will discuss how to develop testing protocols to reduce the risk of claims, suits, and EEOC challenges based on race, gender, and disability. We will also give attendees the tools necessary to understand applicable regulatory guidelines and to analyze how the testing should be applied to avoid disparate impact issues.

Subjective Elements:

Identify some of the personality traits and behavior styles of yourself and others including strengths, weaknesses, motivators, stressors, communication styles, satisfaction level, energy style and so much more. Learn what makes you and those you work with tick through the lens of PDP using your individual Proscan (personality evaluation). Learn how to communicate, manage and work more effectively with team members, patients and significant others by recognizing and understanding the various traits and tendencies that make their personalities so unique.

Suggested Attendee:

Dentists, Physicians, Administrators and the Entire Team

Suggested Length:

Full or Partial Day

Suggested Format:

Lecture, Workshop, Keynote



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Mastering the Hiring Process: Hiring Right the First Time



The *right* hire must have the skill and the personality that dovetails best with your vision and team.

What hiring strategies should you be using to identify the best candidate and hire *right* the first time?



The hiring process is not easy. Studies show that over 50% of all job applications contain misleading or false information, and 85% of turnover is a result of style or behavioral incompatibility. Failure to effectively identify and weed out the candidates that are unlikely to succeed will lead to hiring disasters that can affect the practice for months or years --- and the cost of replacing a problem employee can exceed 100% of his or her annual compensation.

One of the most important functions a practice owner or manager performs is to select and hire individuals who have "the right stuff" to succeed in the practice. -But attracting candidates most likely to succeed is only half the battle. Employers must also keep

employment law basics in mind to avoid legal landmines when hiring. Many costly suits and claims can be avoided if employers understand and apply employment law principles during the hiring process.

Learning Objectives:

- Learn which legal principles you must understand to avoid suits and claims.
- Develop recruiting techniques to attract candidates most likely to succeed in your practice.
- Gain the skills to develop a well-written job description and lawful job ads that attract the personality type most likely to be the best fit for your practice.
- How to use personality and values assessments to get the best results.
- Identify the most important information in resumes and applications.
- Determine how to avoid hidden legal land mines in the hiring process.
- Define situations most likely to lead to a costly lawsuit.
- Discuss the 4-Prong approach to a successful hire.

Objective Elements:

Discuss the employment law basics every practice owner and manager must know to reduce the risk of employment-related suits and claims. Learn how to conduct lawful interviews and make important hiring decisions.

Subjective Elements:

Explore the importance of 'fit' when determining which candidate will be successful as an employee. Define your 'practice personality', its values and its pace. Discuss the personality traits you will encounter when interviewing job candidates and how each either support or weaken the practice values and vision. Learn how these traits play a critical role in the development of effective job descriptions, want ads and interview questions.

Suggested Attendee:

Dentists, Physicians, Administrators and Management Team

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Suggested Format:

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Mastering the Management Process: Lawful, Effective Evaluations and (Nearly) Painless Discipline and Termination



When is it time to cut your losses?

Looking for effective management tools for creating and maintaining high performance teams?



Although termination is sometimes unavoidable, every effort should be made to **minimize** the need to discharge an employee by **maximizing** the ability of the employee to succeed. Learn what management tools you need to maximize the potential of each employee. Employers who incorporate both the *objective*, legal management requirements with *subjective*, personality-driven considerations will be most successful in avoiding costly terminations, and will at the same time create a positive office culture and productive work environment.

It is inevitable that every employer will encounter an employee who cannot succeed as a member of your practice. Learn how to avoid both the legal and the emotional land mines of the termination process that may adversely affect the team and practice.

Learning Objectives:

- Understand how to use employee evaluations as an essential management tool.
- Learn how to develop Team Agreements that increase morale and decrease destructive behaviors and office conflict.
- Pinpoint the right time to transition an employee into a new position as an alternative to discipline or termination.
- Learn how to identify what management tools and style works best with each employee type in order maximize individual performance.
- Develop policies and procedures to prevent discrimination and harassment in every phase of the evaluation, discipline and termination processes.
- Identify the types of disciplinary policies and processes that may actually create liability.
- Explore how problem employees may be responsible for high turnover and unnecessary conflict within your practice.
- Recognize when it is time to “cut your losses” and begin the termination process.
- Explore the myth that a termination will cause the practice to lose patients.
- Discuss effective ways to conduct a termination to minimize potential liability.
- Identify the importance of documentation and consistency to protect the practice.

Objective Elements:

Identify the policies and procedures your practice must have in place to effectively and lawfully manage employees through the evaluation, performance improvement plan and discipline processes.

Subjective Elements:

Learn how the different employee personality types can influence the character of your practice. Discover the management tools you need to maximize the potential of each of your employees along with the written evaluation and discipline techniques that work best for your unique circumstances and each employee type. Identify why follow up and consistency are key to maintaining team excellence and avoid the destructive consequences your team and practice can experience if certain behaviors are tolerated.

Suggested Attendee:

Dentists, Physicians, Administrators and Management Team

Suggested Length:

Full or Partial Day

Suggested Format:

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Mastering Workplace Conflict:

Keeping Your Practice a Battle-Free Zone



The Prima Donna? The Queen Bee? The Whiner? The Pot Stirrer?
Personalities shape the character of the practice and can create conflict.

Failure to promptly identify and resolve destructive workplace dynamics can jeopardize a practice and lead to legal action.



Conflict occurs in every workplace. Most often it is caused by personality factors erupting in a war of egos. Conflict takes its toll on practice owners and team, and it can affect the way patients are treated. Conflicts often result in a lack of personalized attention and a reduction in the quality of patient care (and patients DO sense the tension in the air!)

The way leaders handle conflict can make the difference between having a successful, thriving practice, or practicing in a stressful combat zone with high turnover and low morale. When left unresolved, conflicts can also result in costly suits and claims.

Learning Objectives:

- Identify why some conflict is good and how to channel it to lead to positive outcomes.
- Understand how to develop clear and consistent policies that make all employees accountable.
- Assess individual personalities and understand how they react to / resolve conflict.
- Learn how to develop Team Agreements to avoid future unhealthy conflict.
- Identify the warning signs of destructive conflict so you can successfully mediate conflict and avoid escalation.
- How to understand the stressors and motivators for different personality types so that you can reduce the cause of conflict.
- Understand the laws and EEOC regulations to avoid legal land mines.
- Determine when you can deal with conflicts internally, and when you need to get professional help and / or legal advice.
- Know how to spot the five situations most likely to lead to a costly lawsuit.

Unresolved workplace conflict disrupts workflow, decreases productivity, and increases absenteeism.



Objective Elements:

Identify the legal land mines to avoid when dealing with workplace conflict. Learn management responses that can be considered unlawful discrimination and harassment, and explore ways to minimize liability for actions taken by you and your management team.



Subjective Elements:

Learn the different employee personality types and how they can shape the character of the practice. Gain the management tools needed for conveying your practice's unique set of traits, beliefs, culture and expectations. Explore conflict resolution techniques that work best with your practice and with each employee type.

Suggested Attendee:

Dentists, Physicians, Administrators and Management Team

Suggested Length:

Full or Partial Day

Suggested Format:

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Managing workplace issues is costly not only in dollars and cents but also in lost productivity, high turnover and low morale.

Meet Judy Holmes, JD



Navigating the complex legal-employment issues inherent in managing your team takes skill and knowledge. You need the know-how to avoid the legal land mines of EEOC complaints, charges of harassment and discrimination, workplace violence and other disruptive and costly employment-related claims and suits. Judy Holmes' presentations share the tools, processes and resources to help employers understand how to manage within the law.

Working for over 30 years in defense of both health care providers in medical negligence cases and employers in employment-related suits, Judy Holmes provides expert advice and counsel in the following areas:

- Defending employers in actions filed by employees with the Equal Opportunity Employment Commission (EEOC);
- Consulting with employers and healthcare providers on employment issues, including how to develop and maintain lawful practices related to interviewing, hiring, evaluations, background checks, and terminations;
- Working with employers to develop lawful office policies, and to develop effective handbooks and management systems;
- Conducting employment law audits and risk management assessments;
- Conducting internal investigations of employee discrimination, harassment, retaliation, and workplace violence complaints; and
- Mediation of employment-related claims and suits.

Judy received her B.A. in psychology from Colorado College, and her J.D. degree from the University of Denver. Her practice currently focuses on employment law and risk management strategies, primarily for health care providers. She has served as the Vice President of both the Colorado and Denver Bar Associations and as a Delegate to the House of Delegates of the American Bar Association and as a member of the Board of Governors of the Colorado Bar Association. She is past President of Continuing Legal Education of Colorado, and has served as Chair of the Judiciary section of the Colorado Bar Association. She is currently serving on the Board of Directors of the Colorado Healthcare Strategies & Management organization and on the Board of the Metropolitan Denver Dental Foundation.

As a faculty member of the National Institute of Trial Advocacy, Judy teaches trial and deposition skills to attorneys nationally. She is co-author of *The Rocky Mountain Employer*, 1st ed. and has authored numerous publications on employment law issues. She partners with practice management consultant, Leigh Olson, to deliver unique management workshops on many employment and health care related topics.

Judy is a certified consultant with Professional DynaMetric Program and received her certification in mediation training through the MTI Institute. Judy is the owner of The Compliance Clinic, LLC, and cofounder (with Leigh Olson) of Master Series Seminars, LLC.



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Hiring the best people is often difficult,
and retaining them can be even harder.

Meet Leigh Olson

Understanding personality types and how they react to various environmental stimuli will have profound effects on your practice, your level of stress and even on the experience your patients are having in your office. Learn to recognize, understand and interact more effectively with the various traits and tendencies that make up your team and your patients to create a more stable, productive and balanced environment for your practice.

With over 20 years of experience in people management, training and team building in the dental and healthcare industry, Leigh Olson blends a traditional “objective” style with the intuitive or “soft side” of business management and team development. Her objective is to help business owners *define, build and align* their teams around their “vision”. Using this approach Leigh has helped numerous owners uncover the *causes* and not just live in the *effects* of poor personnel choices, low morale, poor production, lack of leadership and ineffective management disciplines.



Leigh is the owner of Nova Consulting. She is a speaker and co-founder of the Colorado Dental Manager's Association. Combining her certification as a consultant through Professional DynaMetric Programs, her experience as a sales consultant and trainer for Sunstar America and her background as a treatment coordinator for one of Denver's largest periodontal dentistry offices, Leigh has developed a unique approach for selection, hiring, and training teams that crosses all industries. Trained at the MTI institute in mediation training she helps her clients' teams resolve conflict while providing the tools to learn self-mediation.

Often referred to as the “business counselor,” Leigh is the co-founder of the Colorado Dental Managers' Association, a study club dedicated to healthcare managers. She partners with attorney, Judith Homes, to deliver unique management workshops on “hot button” issues facing the employer-employee relationship today.

Partial Listing of Past Presentations by Leigh Olson & Judy Holmes

- American Society of Interventional Pain Physicians (*multiple*)
- Arapahoe-Douglas-Elbert Medical Society (*multiple*)
- ASIPP Review Course (*multiple*)
- ASIPP Annual Meeting (*multiple*)
- Colorado Bar Association, Continuing Legal Education
- Colorado Defense Lawyers Association Annual Session
- Colorado Dental Association (*multiple*)
- Colorado Dental Association, New Dentist Committee
- Colorado Dental Manager's Association (*multiple*)
- Continuing Legal Education in Colorado, Inc.
- Continuing Legal Education International, Inc.
- Denver Medical Study Club
- Employment Law Institute
- Lorman Education Services
- Master Minds Study Club (*multiple*)
- Medical Group Management Association, Annual Meeting
- National Association of Federal Credit Unions
- Rocky Mountain Dental Convention, Denver, CO (*multiple*)
- University of Colorado
- University of Denver MBA Healthcare Administration

Rave Reviews



I thoroughly enjoyed the seminar. Gained useful information and insights. Leigh and Judy were excellent presenters and they were able to convey their messages in a very “user friendly” and entertaining manner. I especially enjoyed the mock interviews, and the feedback regarding those sessions. The day flew by. I would definitely be interested in attending any additional sessions available.

Lori Peiffer; Sr. Staffing Coordinator
MEDDirect Recruiting & Staffing

“Mastering the Hiring Process” is a great resource for Colorado dentists and their dental office managers. The program uses a unique approach combining traditional learning with hands-on workshops to take attendees through the various steps of the hiring process. The seminar provides the basic, and not so basic, skills and legal considerations that a dental team needs to know and implement to find their “ideal” employee.

Pam Brockhaus; Associate Executive Director
Colorado Dental Association

I never knew that the hiring process was so complex! Mastering the Hiring Process Seminar identifies key legal issues to protect you and your potential applicants. This interactive seminar improved both my interviewing skills and ability to identify red flags on a resume. Leigh's expertise combined with Judy's extensive background in employment law provided helpful suggestions to make my weaknesses become strengths.

Dr. Jared Bruggeman;
Smokyhill Dental

Every Doctor should attend the “Mastering the Hiring Process” seminar. It is an absolute must! Those who do will walk away with the knowledge and tools necessary to hire the right way; from the beginning stages of recruitment through the entire interview process. Sign up now and educate yourself on how to build an all-star team!

Samantha Glucksman; Equipment Consultant
Henry Schein Dental



The hiring seminar was one of the best I've attended. Judy presented detailed legal information that was easy to follow and kept the audience engaged. Leigh enhanced the presentation with value based practice management techniques. The interactive exercises allowed participants to put to use the information covered in a fun and entertaining way.

Areta Reimer, MHS
Consultant/Certified Dentrux Trainer



Personnel decisions are among the most important that managers and owners make, with long-lasting effects. Whether you have years of experience or you are just getting your feet wet, I would encourage anyone who has a role in the hiring process to attend “Mastering the Hiring Process”. This program is highly informative, yet fun and engaging with an opportunity to practice your new skills. This seminar is not to be missed!

Elaine Olsen; Practice Manager
Colorado Wellness Dentistry



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