# Getting Help - Part Three

Once you've identified the top candidates, the next step is an initial screening interview. We use Zoom video conference for this, and it's a fantastic option. We've used pretty much all of the options out there, and this is what works best for us. We typically start with a half-hour video interview, which is enough to get a sense of who they are, ask them initial screening questions, and answer their questions. Video provides a lot more information than phone alone. It also gives you some sense of how tech savvy they are, so if they have trouble joining the video call or getting their audio or video to work, that's a potential red flag.

Interviewing, of course, is a real art form, and I don't claim to be an expert at it. It's quite challenging, I think, to do a good interview. I think I've gotten better over time. I've read several books on it and talked to lots of experts, and I do have a list of questions that I typically draw from for the initial screening interview, and I'll share those as a handout for you. There is also a good book on hiring people that I've read called *Who: A Method for Hiring*. It has some really useful information. I don't follow that process to the letter that they outline, but we took a lot away from it that was valuable.

In the initial interview I'm looking for rapport, self-confidence, punctuality, whether they were able to join the video and audio successfully, their career path, what brought them to apply, and perhaps the most important question that we ask in these interviews is where they see themselves in three to five years. Again, you might be surprised by this, but a pretty large percentage of people might say something such as "I'm looking forward to launching my health coaching practice," or "I'm getting ready to go back to school to become a naturopath," or something like that, and that's fantastic for them, but not particularly great for you as an employer. If someone really, mostly, wants to build their health coaching practice, then it seems pretty clear that they are going to use this job as a way of making some money in that transition, and they're probably not going to be around for long if they are successful at building their health coaching practice. Now, of course, you can't expect an administrative employee to be around for 20 years, but if you're going to go through all the trouble to hire them, ideally you want someone who is going to be around for at least a few years to justify all the time and energy you put into hiring and training them. We've found that is a valuable question. There are a lot of people out there who are happy to be in a support role in a field such as this. They've got some experience doing other kinds of support, working in medical offices in conventional medicine, and they would much rather do that same work in an office. First of all, that has more flexibility with the virtual setup and, second of all, is doing really good work and helping patients get well from a functional and ancestral perspective.

After the initial interviews, we narrow it down to two to three candidates. We would do the audition then, if we haven't already. For the people who we decide that we would like to go forward with, we ask them to take something called a Winslow Profile. This is a personality assessment used by Fortune 500 corporations, the NFL, and other large organizations. The purpose is to determine whether a prospective hire is a good fit for the position they are being

hired for. Now, trust me, I had a lot of resistance to these kinds of profiles early on but, over time, I've come to see them as indispensable, and I would not hire someone without seeing their Winslow first. Research suggests that when a person fails in their career, in more than 90 percent of cases, that failure is directly attributed to some aspect of human behavior. It's not a lack of education, experience, training, or skills. Essentially, they fail because their personality isn't compatible with the behavioral requirements of their position or career.
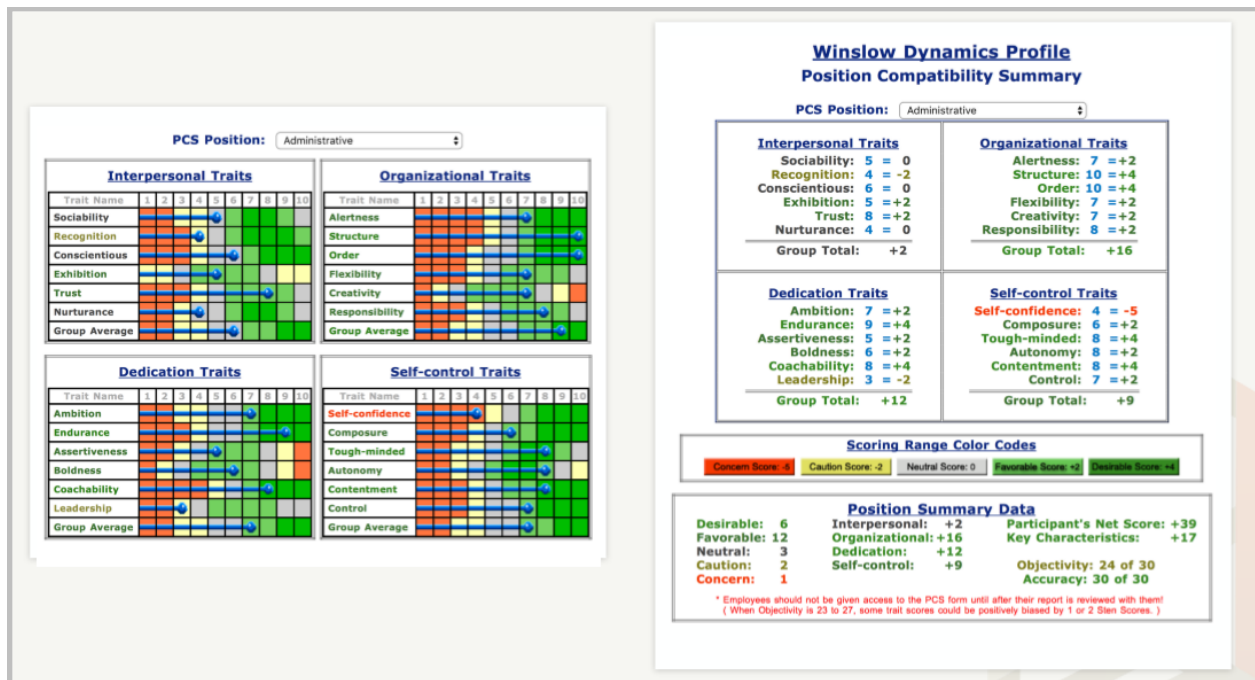
Here is an example from a candidate who we did end up hiring. Her scores are on the left, and then the evaluation of her scores against a profile specific to administrative work are on the right. Her net score of +39 indicates that she has a far-above average chance of being successful in this position. She has very high scores in structure and order, which means she pays a lot of attention to detail and is really good at creating systems. She has a high score in responsibility, which means she does what she says, when she says she will do it. She got a 7 in creativity and flexibility, which means she can find solutions to problems on her own. High scores in tough-mindedness, autonomy, and contentment, which means she is good at working independently. She is not thin-skinned, and she is overall pretty happy and content. The single area of concern here would be a 4 in self-confidence. That means she may need to ask a lot of questions before she proceeds. She may need a lot of reassurance, but this certainly would not prevent me from hiring this employee, and when you get to know the Winslow Profile and these qualities, that can really actually help you manage someone after you have hired them.

If you do choose to use the Winslow Profile, I would suggest hiring a Winslow expert to help you interpret the profiles. At this point, I've seen so many of them that I'm getting pretty good at doing it myself, but we still use someone to advise, and I'll provide a link to a small network of certified Winslow coaches in the resources section.

Note that Winslow is only one variable in the hiring decision. We never would make a decision based on the Winslow alone. That said, the few times I've ignored the Winslow and gone with my gut sense from the interview or other aspects of the application, I've definitely regretted it. This is similar to the audition.

Finally, you should use Winslow to help you figure out how to best manage or supervise each staff member after they have been hired, as I mentioned. For example, someone with a high score in recognition will need more nurturing and feedback than someone with a lower score, such as the person on this slide.
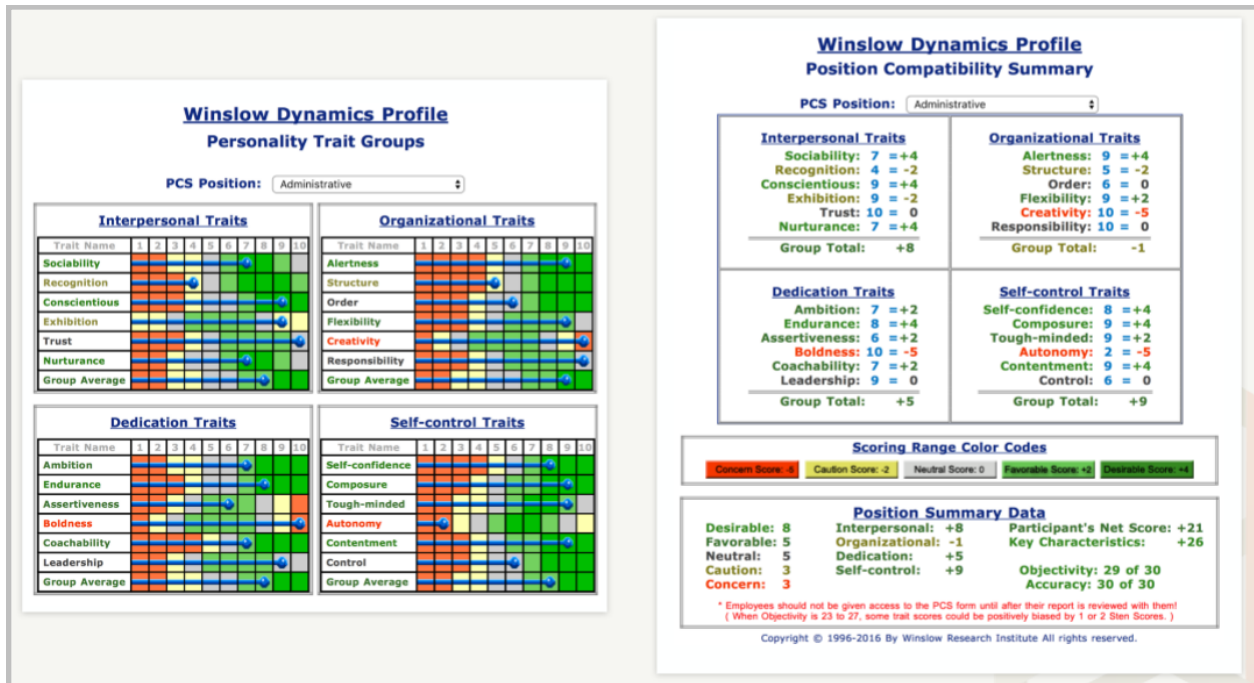
Here is an example of someone who wasn't a good fit for an admin position. This is actually someone who we were evaluating for my executive assistant position, and it's deceptive because the net score is 21 for overall characteristics and then +26 for key characteristics. If you just look at the net score, you might think this person would be a good fit, but there are three areas of concern, which are problematic. Boldness score of 10 means they will take matters into their own hands, even when they don't really know what they are doing, and that's definitely not a quality I want in my executive assistant. Exhibition score of 9 and leadership of 9 means they don't enjoy being a support person behind the scenes. They would much rather be the center of attention, again, not a good quality for an executive assistant. Autonomy score of 2 means they don't work independently or autonomously very well and, again, not what I'm looking for. Then a 10 in creativity means they are going to get really bored doing the same repetitive tasks each day that don't require any improvisation or creativity. Of course, they have many good qualities as well—high scores in responsibility, alertness, flexibility, self-confidence, and endurance—but I felt that the areas of concern were significant enough to pass on this candidate. This was confirmed when we

later learned that his primary goal was to become an actor. Actually, this Winslow Profile was perfect for an actor, and he will very likely be successful in that endeavor. If we had hired him, it's extremely likely that he would not have been around for very long.

A similar alternative to Winslow is called a Kolbe A Index. In their words, they say, "IQ tests tell you what you can do, personality tests tell you what you want to do, and the Kolbe A Index measures what you will or won't do." It measures something called conative ability, not cognitive, but conative ability. Kolbe defines conation as action derived from instinct, purposeful mode of striving volition. It is a conscious effort to carry out self-determined acts. One of the purposes of Kolbe is to help you focus on your strengths, on how you do things when you're free to do them in your own way, when you're "in the zone" so to speak. There is no good or bad, right or wrong, or better or worse scores with the Kolbe Index. It's all about validating and celebrating strengths and applying those strengths in your position or career.
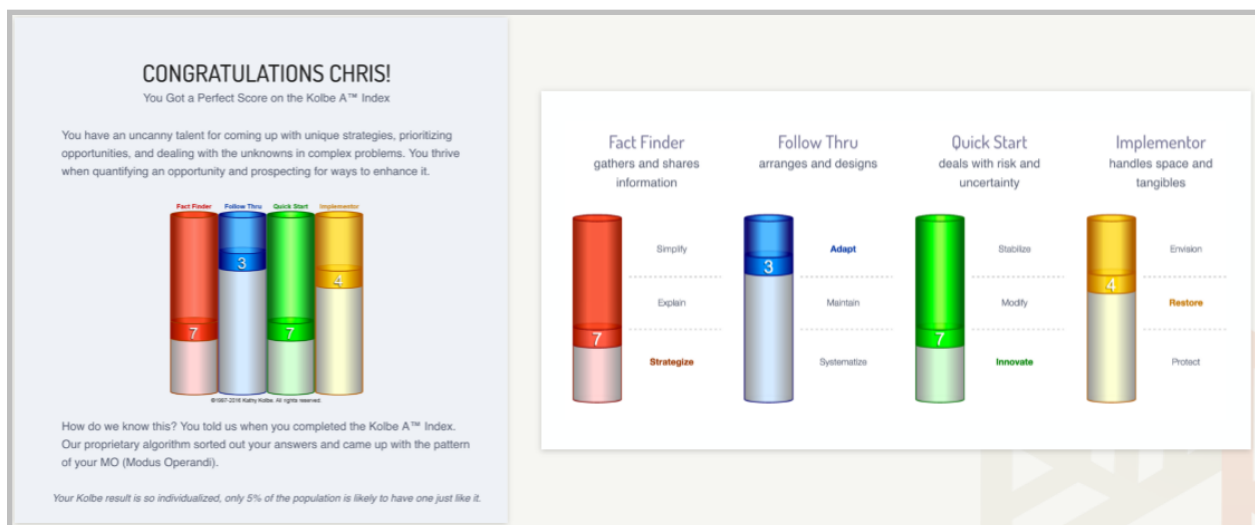
I put my Kolbe A Index on this slide for fun. I have a 7—a high score—in Fact Finder, so that would suggest I'd be a good researcher. It may not be surprising to you to see that. I have a 3 in Follow Thru, so this suggests that I'm not systematizing and maintaining things after they've already been created. It's not my strength, and that's definitely true about me. I have a 7 in Quick Start, you see high scores in this category in entrepreneurs or people who like to create new things. I love to create new things and innovate, but I'm not very good at systematically maintaining those things once they have been created. Then, finally, I have a 4 in Implementor. This is more about handling space and tangible objects. I'm a little bit less clear on how this one in particular relates to virtual business and work. We don't use the Kolbe Index ourselves, so I'm less familiar with it, but there are a lot of folks out there who really love it. To some extent, it's a little bit easier to work with than the Winslow Profile because it is only four qualities but, for that reason, I didn't find it to be as helpful as Winslow.

Kolbe also has a system for matching a potential hire with a Kolbe A Index, and this is called the Kolbe RightFit, so instead of guessing how well a prospective employee would perform, RightFit helps you identify the required methods of operation or profile of the ideal candidate, and then the software ranks each candidate on an A-to-F scale based on how well their individual instincts compare to the requirements for success in that given role.

One national financial services company uses RightFit, and they estimate they saved more than $10 million between interviewing, retraining, and downtime. Another employer reported zero percent of their employees who were hired using RightFit left for job-related reasons. That's pretty impressive.

	FF 4 - 6	FT 6 - 9	QS 2 - 5	IM 2 - 4
Range of Success (Created: 09/23/14)				
Candidate's MO (Kolbe A Index taken: 01/04/15)	4	5	6	5

Candidate's Selection Kolbe Letter Grade   B+

This letter grade is based upon the information you have given us about your requirements for the above position.

☐ This applicant appears to meet all your instinct-based requirements.
☑ Compared to the ideal candidate, this applicant appears to be:

☐ somewhat less precise.   ☑ somewhat less structured.
☐ somewhat more precise.   ☐ somewhat more structured.
☐ considerably less precise.   ☐ considerably less structured.
☐ considerably more precise.   ☐ considerably more structured.
☐ somewhat less innovative.   ☐ somewhat less tangible.
☑ somewhat more innovative.   ☑ somewhat more tangible.
☐ considerably less innovative.   ☐ considerably less tangible.
☐ considerably more innovative.   ☐ considerably more tangible.

This candidate is WILLING TO:

- review the data
- give specifics
- go with the highest probability
- respond appropriately
- test analogies
- maintain order
- follow procedures
- adhere to plan
- maintain concentration
- maintain classifications
- go along with risks
- provide challenges
- assist innovation
- overcome the odds
- follow another's hunch
- use models
- provide transportation
- utilize protective gear
- respond to space requirements

- work within priorities
- accept rank order
- use terms properly
- review historical evidence
- review written material
- work within the system
- fill in charts
- stay in sequence
- complete when necessary
- utilize diagrams
- participate in experiments
- try alternatives
- use metaphors
- interject spontaneously
- work with tangible goods
- envision concrete examples
- incorporate tactile clues
- use mechanical devices
- use tools and equipment

Here is an example of a RightFit that I did when I was hiring my first executive assistant several years ago and, at this point, I was still using Kolbe instead of Winslow. The candidate's overall score is a B+, as you can see at the top right. Compared to the ideal candidate, she is somewhat more

innovative and tangible, but somewhat less structured than the ideal candidate would be in that position. I did end up hiring her and I found that this was actually right on.

So, both Kolbe and Winslow are great tools, and which you choose is mostly a personal preference. I've found Winslow provides more information overall and is a better screening tool. It seems, to me, to have more depth but this may, in part, be that I've had a long-term staff member who is an expert in Winslow, so it was just easier for me to understand. Either one will help you considerably, I would think.