

✓ Right People Scorecard Instructions

NEVER FORGET THAT EVERYONE'S #1 JOB IS TO HELP BUILD AN AMAZING TEAM.

The way you do that is to hire, fire, review, reward, and recognize all of your people around 2 things: Core Values (Right People) & Results (Right Seats). That's the way to build an organization with all of the Right People in the Right Seats. The Right People Scorecard (when used consistently and correctly) will do that and provide extreme clarity.

IN MOST SITUATIONS, TEAM MEMBERS ARE NEVER GIVEN A "CLEAR LINE OF SIGHT" ON HOW THEY CAN SUCCEED IN THEIR ROLES.

On top of it, they are never given super clear feedback on whether or not they are meeting expectations regarding their roles. Lastly, team members are rarely given coaching by their leaders on how to meet or exceed expectations in their roles. The Right People Scorecard fixes all of that if used correctly.

The Formula for Right Person + Right Seat:

Right People = They share your Core Values

Wrong People = They don't share your Core Values

Right Seat = They G.W.C. (Get It, Want It & Have the Capacity to Do It). Bottom line is that they Get Results consistently in this role.

Wrong Seat = They Don't G.W.C. (Get It, Want It & Have the Capacity to Do It). Bottom line is they don't Get Results consistently in this role.

The 3 Questions to Ask a Candidate Before Offering Them a Position:

QUESTION #1

We believe very strongly in finding team members that are the Right People and then we make sure they are in the Right Seat. Do you agree with that philosophy?

QUESTION #2

Would you like to see the grading system (Scorecard) we use to coach our team members on Right Person / Right Seat? It shows our team members clearly how they are performing here.

QUESTION #3

Would you like super clear feedback (and coaching) about your performance here?

Once the candidate gives you the answers that you find acceptable to hire, show them the **Right People Scorecard** and let them know that this is the tool you are going to use on a monthly basis to ensure that you (as the employer) give them a “clear line of sight” on how to succeed here. There will never be any surprises about how well they are performing in comparison to what is expected in the role (which is the single biggest challenge in running any business). Use this tool for the first 4 months of the team member’s employment. Then move to quarterly check-ins with this Scorecard. Using this Scorecard (correctly and consistently) will give the team member the support they need to succeed, provided they truly are the right person for the role.

If You Use This Tool Correctly, You Will Not Have to Fire People Most of the Time:

In practice, you will discover that you don’t have to fire people most of the time. If you use the Right People Scorecard correctly and consistently, along with the 3 Strike Rule, the people that don’t fit won’t last until the third strike. Some don’t even last until the first. Instead, they leave on their own, because they know they don’t fit.



Our Recommended 4-Step Process Using the Right People Scorecard:

Step #1

After discovering your Core Values as a leadership team, use this Right People Scorecard on each other. This will accomplish two objectives. First, It will validate your Core Values. If you're all weak in one particular value, you should question whether or not it truly should be included. Second, you will see if someone on the leadership team is below the bar. While this is a tough situation, you must follow the 3-Strike Rule (see below) with this person as well. Most of the time, this will improve his or her performance. Sometimes he or she will opt out.

Step #2

Have your leadership team use the Right People Scorecard on everyone in the organization and then have each manager share those results in one-on-one sessions. This will bring the tool to life throughout the organization.

Step #3

Use the Right People Scorecard at least once per quarter in your performance review with all team members. We recommend you get the most out of the tool and use it monthly with each team member from their "coach." "Coach" is a better term than "Manager," because it better describes the role. Let them analyze you as well with the Right People Scorecard. Don't be afraid to put your money where your mouth is.

Step #4

If your leadership team is struggling with a personnel problem, run the person through the Right People Scorecard. This will give you a clear perspective on whether it's a right-person issue. If it is, there is nothing more to discuss and you now know how to solve it. If it isn't, and it might be the person's seat, we now know where to put our energy.

Team Member 3 Strike Rule:

Strike One:

Discuss the issues and your expectations with the person and give him or her 30 days to correct the problem.

Strike Two:

If you don't see improvement, discuss his or her performance again and give him or her another 30 days.

Strike Three:

If you still don't see improvement, he or she is not going to change and must go. When the termination finally happens, all of those who are the right people will thank you for it and wonder what took so long.

Right People Scorecard - The Rating System:

(2) Above Expectations:

This person exhibits that core value most of the time.

(1) Meets Expectations:

Sometimes this person exhibits the core value and sometimes they don't.

(0) Below Expectations:

This person doesn't exhibit the core value most of the time.

You Must Set “The Bar” for Core Values & GWC Rating

- You set “The Bar” which is the minimum standard you will accept from the Right People Scorecard in this section.
- The power of setting “The Bar” is that you give all leaders absolute clarity on what is acceptable and what is not.

Are each of your people in the right seat?

- If they are not, you will be frustrated, they will be frustrated, and, as a result, you will never be able to completely delegate and elevate. You will always be forced to do their work and will not be able to let go of the vine.
- When a team composed of the right people in the right seats agree to a number to hit, they ask themselves “how can we hit it,” creating camaraderie and pressure. They will pull together to find a way to collectively achieve that number. The ones that aren’t pulling their weight and hitting the number will be called out by the other team members that are.
- In order for someone to be in the right seat, to step up, and to ultimately fill the opening you have created, he or she must get it, want it, and have the capacity to do the job. If any one of the three is a “no,” it is never going to happen ... 99.9 percent of the time.

G = Do they GET IT? (Yes or No)

- Do all of the neurons in his or her brain connect when you explain and they do the job?
- Does he or she get all of the ins and outs of the position?
- Not everyone gets it, and it’s not a bad thing. He or she just needs to be in a different seat.

W = Does he or she genuinely WANT to do the job? (Yes or No)

- Does he or she get up every morning wanting to do it?
- You can’t pay, motivate, force, or beg him or her to want it. He or she has to want it on his or her own. Sometimes people get it and have the capacity, but just don’t want it anymore.

C = Does he or she have the CAPACITY to do the job? (Yes or No)

- Does he or she have the mental, physical, spiritual, time, knowledge, and emotional capacity to do the job?
- Sometimes this one is negotiable. While not getting it or wanting it are deal-killers, a problem of capacity can be solved, although rarely. If you believe the person can gain the capacity and you are willing to invest the time, resources, and energy for him or her to do so, do it. It is just that most growing organizations don’t have the luxury of waiting one to three years for someone to gain the capacity and need the seat filled completely now.

✓ Right People Scorecard

Team Member Name: _____

Role in the Company: _____

- **(2) Above Expectations:** This person exhibits this most of the time.
- **(1) Meets Expectations:** Sometimes this person exhibits this and sometimes they don't.
- **(0) Below Expectations** This person doesn't exhibit this most of the time
- **Important!** Schedule the next Check-In before reviewing this Scorecard

RIGHT PERSON				
CORE VALUES	DATE	DATE	DATE	DATE
All In Attitude				
Give > Get				
Results Driven				
Walk the Talk				
We Before Me				
Always Be Growing				
TOTAL SCORE				
MINIMUM BAR	6	6	6	6
RIGHT PERSON?	NA	NA	NA	NA

Right Seat				
GETS RESULTS (GWC)	DATE	DATE	DATE	DATE
Gets It				
Wants It				
Capacity to Do It				
TOTAL SCORE				
MINIMUM BAR	3	3	3	3
RIGHT SEAT?	NA	NA	NA	NA

Notes / Coaching	
Date	
Date	
Date	

✓ Right People Scorecard

Team Member Name: Jane Doe

Role in the Company: Treatment Coordinator

- ▶ **(2) Above Expectations:** This person exhibits this most of the time.
- ▶ **(1) Meets Expectations:** Sometimes this person exhibits this and sometimes they don't.
- ▶ **(0) Below Expectations** This person doesn't exhibit this most of the time
- ▶ **Step #1** Schedule the next Check-In before reviewing this Scorecard

RIGHT PERSON

CORE VALUES	DATE	DATE	DATE	DATE
	1/16/23	2/27/23	3/27/23	
All In Attitude	2 - Above	2 - Above	2 - Above	NA
Give > Get	2 - Above	2 - Above	2 - Above	NA
Results Driven	0 - Below	1 - Meets	2 - Above	NA
Walk the Talk	1 - Meets	1 - Meets	2 - Above	NA
We Before Me	2 - Above	2 - Above	2 - Above	NA
Always Be Growing	1 - Meets	2 - Above	2 - Above	NA
TOTAL SCORE	8	10	12	NA
MINIMUM BAR	6	6	6	6
RIGHT PERSON?	RIGHT PERSON	RIGHT PERSON	RIGHT PERSON	NA

RIGHT SEAT

GETS RESULTS (GWC)	DATE	DATE	DATE	DATE
	1/16/23	2/27/23	3/27/23	
Gets It	1 - Meets	2 - Above	2 - Above	NA
Wants It	2 - Above	2 - Above	2 - Above	NA
Capacity to Do It	1 - Meets	1 - Meets	2 - Above	NA
TOTAL SCORE	4	5	6	
MINIMUM BAR	3	3	3	3
RIGHT SEAT?	MAYBE	MAYBE	RIGHT SEAT	NA

NOTES / COACHING

1/6/23

Jane recently moved into this role from Dental Assisting. She is still learning the role and the software as it's different from when she was using clinical functions. She hasn't been able to get much case acceptance yet so RD scored a 0. I do believe she wants the position, but she's still new to it. I'd like her to devote more time to learning the role as well as better time management. We'll connect again in about 6 weeks.

2/27/23

Jane is really making strides to become more efficient and practicing her case presentation skills with other team members. I'm still concerned about the lack of results, however, I do believe with a few more months of training, she'll become more confident with the financial conversations and improve her case acceptance. We'll meet again in 4 weeks this time.

3/27/23

Jane has hit it out of the park! On her own time, she watched the "Mastering Your Verbal Skills" webinar from ACT, and has asked the other TCs to observe and provide feedback on her case presentations with patients. Her acceptance rate went up by 67% in the last month. I'm really proud of her! We'll check back in together in 6 weeks.