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Addendum (edited 8/23/17):

KOLBE PROFESSIONAL AWARD APPLICATION – Michael Roby

CLIENT	TYPE	DESCRIPTION	PRODUCTS, SOLUTIONS, METHODOLOGIES	SPECIFIC PROBLEMS ADDRESSED & SOLUTIONS
Money Concepts Capital Corp. Florida	Corporate; International Broker-Dealer with 700 Reg. Representatives.	Individual Interpretations & Team-Building for Executive Officers and Department Heads.	On-site Team Building & coaching designed to improve understand of self and to foster better communication and RESPECT for the differences in others. Met with head of HR to provide background and practical education about how to use Kolbe. <ul style="list-style-type: none"> • Kolbe A • Kolbe B • Kolbe C • A to A Comparisons 	Department Head Amanda (7-8-1-5) and her employee Lisa (7-3-9-1) struggled with Lisa’s “lack of focus” and “non-compliance with procedures.” We met onsite and discussed using Lisa to brainstorm new projects and procedures, with Amanda systematizing and codifying the results. Advised Amanda not to “edit” Lisa until Lisa ran out of steam, and then ask, “What else, what’s missing? Amanda then wrote procedure looking for holes and problems. Lisa then reviewed and pointed out redundancies and shortcuts.
Franktown Open Hearts; Tennessee	Non-Profit; Inner-City Ministry	Team Construction, Building, and Hiring	Serves underprivileged children with a faith-based approach to social interactions, school, and employment preparation. Work with the Executive Director on team interaction and hiring. <ul style="list-style-type: none"> • Kolbe A • Kolbe B • Kolbe C • A to A Comparisons 	New Exec. Director Chris (7-8-3-3) inherited Lamont (6-3-7-4) as his Program Director. Lamont struggled with organization, planning, and volunteer coordination. Chris expected Lamont to write procedures and lead a team of volunteers. Suggested to Chris that HE write the procedures after getting Lamont’s input, and build a dashboard of essential activity metrics for compliance & supervision. Lamont complied, and program became more organized and effective.



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Faithful Stewards Financial Planning; Indiana	Corporate; Fin. Advisor	Team Construction, Building, and Hiring	Financial Advisor with a need to make the right hire. <ul style="list-style-type: none"> • Kolbe A • Kolbe C • A to A Comparisons 	Rob (7-7-3-3) struggled getting the “right person.” His hires were capable and motivated, but they clashed in day-to-day interactions. Rob, former engineer, invested the time to learn the in’s and out’s of Kolbe. We discussed what a good fit would look like in terms of MO. Interviewed 5 candidates, picked 3 to go to next stage. His first choice was a good fit, and we used the A-to-A to help each of them understand how to work together.
iWealth; Minnesota	Corporate; Fin. Advisor	Team Construction, Building, and Hiring	<ul style="list-style-type: none"> • Long-term client and an on-going relationship. We talk often, and Kolbe comes into play anytime he has a hiring decision or if things “aren’t quite right” between team members. Kolbe A • Kolbe B • Kolbe C • A to A Comparisons 	Brad (7-8-4-2) was looking for a system for more effective hiring. Use Kolbe on ALL candidates, and he has had great success with our Professional Hiring Matrix™
Investors Advantage; New York	Corporate; Third-Party Investment Manager	Team Construction, Building, and Hiring	As this firm reengineers their marketing, they needed guidance on their existing personnel and guidance on new hires. Significant Conative Cloning and stress. Project is ongoing. <ul style="list-style-type: none"> • Kolbe A • A to A Comparisons 	New client who had the wrong people in the wrong seats on the bus. High degree of conative cloning, We have rearranged the roles in the business, and stressed the need for communication and respect for others natural gifts.
John Berry; Texas	Personal; Assessment of Teenage Children	Help the Parents better understand their sons’ Conative Gifts	NOTE: Did not meet with or talk to the sons, as I am not a licensed counselor or therapist. Discussions with parents limited to interpretations of the reports and conversations about conative gifts coupled with cognitive aspects and affective traits. Father is a corporate client and we use Kolbe in his business. Children are home-schooled, and A to A Comparisons were used to help the father with joint projects with the boys. <ul style="list-style-type: none"> • Kolbe A • A to A Comparisons 	John (6-3-8-3), a long-term client, has used Kolbe successfully with hires and team building. Chose to use Kolbe to better guide and parent his teen sons. They have incorporated Kolbe into the family discussion lexicon with excellent results and deeper trust relationships.



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TESTIMONIALS

Kolbe has indeed been a tool that continues to make a difference in my business. Now that I have a better understanding of the Kolbe process, it is so much easier to have correct expectations, communicate assignments and progress, and have the right people on the right projects. It makes life less stressful and more productive and happy. Thank you for helping me understand how easy it can make a big difference.

~ Barry Dayley, CFP®, RFP; SVP, Money Concepts Capital Corp.

I want to thank you for your help in selecting my Client Concierge & Administrative Assistant last fall. As you know, I had tried filling the position three times on my own. Your expertise and ability to walk me through an actual process in filling the position was much appreciated at the time. More than 7 months later, it is night and day the difference in the how this individual is performing over the previous people who had been hired. I firmly believe the insight you provided with Kolbe enabled me to better understand what the position needed to succeed, but also make sure the person I was considering was right for the job. I wish I had used you to help fill the position earlier.

~ Robert Moritz, CFP®, CFS; CEO, Faithful Stewards, Inc.

Recently I contacted [Michael Roby] and I engaged him as a consultant to my organization, Investors' Advantage Portfolios, to help improve the management, [our] relationships and to help each team member better assume the roles they are best fit for through the use of the Kolbe system. We are into our second month of the process and we already started to see the positive impact of his valuable contribution. We are committed to maintain his services as we think he will help us rise to a much higher level achievement as a team and as individuals.

~ Fraj Lazreg, AIFA®, CFM, RFC®; CEO, Investors Advantage Portfolios

I consistently have asked Mike to help me run Kolbe reports on everyone that works for my organization. The reports are great but Mike has a way of interrupting the reports and helping me understand exactly why our team functions the way it does. Before I hire anyone on our team Mike will help run the appropriate reports and review them with me to have a greater likelihood that the new person will fit in correctly. In addition to that I have

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asked Mike to review each Kolbe with each team member so we have a language we all understand in the office. I would recommend Mike to anyone that wants a greater understanding of their team and how to gain productivity by using Kolbe tools.

~ Bradley E. Connors, Certified Wealth Strategist®, CEO, iWealth

The assessment and training Michael gave our team was most effective. We were able to identify, and then deal with issues that were negatively affecting our productivity.

~ Chris Barnhill; Executive Director, Franktown Open Hearts

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