

The CLIMB Model™ Breakout Discussions

Scenario 1: The New Hire Who Looked Great on Paper

A newly hired dental assistant interviewed well, had solid experience, and seemed enthusiastic about joining the practice. During the first few weeks, however, concerns begin to surface. They are frequently unprepared for procedures, struggle to maintain operatory flow, and become defensive when corrected.

The office manager is torn. The practice is already short-staffed, and replacing the assistant would put more pressure on the team. At the same time, the manager does not want the clinical team compensating indefinitely for someone who may not be able or willing to meet expectations.

Decision to make:

What is the most appropriate next leadership decision for this team member, and what information should guide it?

CLIMB Application

C — Culture Alignment

What does this decision communicate about preparation, teamwork, accountability, and the standard of patient care?

L — Leadership Lens

Were the role expectations, training responsibilities, and performance standards clearly communicated, or is the manager reacting to frustration without first confirming what the employee was taught?

I — Issues & Outcomes

What happens if the manager allows the problem to continue because the practice is short-staffed? What happens if the employee is dismissed before receiving clear feedback and a reasonable opportunity to improve?

M — Manage Risk

What documentation, retraining, coaching plan, checkpoints, or measurable expectations should be established?

B — Balance & Buy-In

How can the manager reset expectations firmly and fairly while giving the employee a legitimate opportunity to succeed?

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Scenario 2: The Quick Quitter

A newly hired front office team member resigns after three weeks. The office manager feels blindsided because the employee appeared engaged and had not raised any major concerns.

During the exit conversation, the employee explains that the position was much more stressful than expected. Training varied depending on who was available, different team members gave conflicting instructions, and the employee often felt embarrassed asking questions in front of patients.

The remaining team is frustrated because this is the third new hire they have trained in the past year. They are tired of repeatedly absorbing additional work while another replacement is recruited.

Decision to make:

What should the office manager change or evaluate before hiring the next person?

CLIMB Application

C — Culture Alignment

What kind of onboarding experience should reflect the practice's stated values and leadership standards?

L — Leadership Lens

Where does the manager own the onboarding process, even if they do not control the employee's final decision to leave?

I — Issues & Outcomes

What patterns are likely to continue if the practice simply replaces the employee without examining the process? What could improve if onboarding becomes more structured and consistent?

M — Manage Risk

What should be added, such as a written training plan, designated trainer, role-specific checklists, 30/60/90-day check-ins, competency milestones, or stay interviews?

B — Balance & Buy-In

How can the manager involve the existing team in improving onboarding without making them feel responsible for fixing a leadership problem?

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Scenario 3: “Why Does She Always Get the Best Schedule?”

A long-term hygienist learns that a newer member of the hygiene team has been selected to attend advanced training and take on additional clinical responsibilities. The employee is frustrated because they have more tenure and believed they would be the natural choice for the opportunity.

The office manager selected the less-tenured hygienist based on their reliability, willingness to help across the practice, and demonstrated readiness for the added responsibilities. However, the opportunity was never announced to the team, and the manager did not explain the qualifications or decision-making process.

The employee begins making comments that management “plays favorites” and questions why hard work and loyalty do not seem to matter. Other team members begin wondering whether development opportunities are based on clear expectations or simply who leadership prefers.

Decision to make:

How should the manager address the employee's concern and create a clearer process for future development opportunities?

CLIMB Application

C — Culture Alignment

Does the current approach communicate that growth opportunities are fair, attainable, and connected to the practice's expectations?

L — Leadership Lens

Did the manager make a reasonable decision but fail to communicate the criteria, or were personal preferences allowed to influence the choice?

I — Issues & Outcomes

What happens if the manager dismisses the concern as jealousy? What happens if leadership changes the decision simply to avoid conflict?

M — Manage Risk

What qualifications, performance expectations, application process, or development pathway should be established for future training and advancement opportunities?

B — Balance & Buy-In

How can the manager acknowledge the employee's disappointment, explain the decision honestly, and provide a realistic path toward future opportunities without making promises?

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Scenario 4: The Return of a Former High Performer

A former dental assistant who was clinically strong and well-liked by the doctor asks to return to the practice. The employee left for a higher-paying opportunity, but the new position did not work out.

The doctor is eager to bring the assistant back because the practice is hiring and the employee would require less clinical training than a new candidate. The office manager is more cautious. Before leaving, the employee had attendance issues, resisted some office protocols, and created tension by telling coworkers that management did not appreciate the team.

Some current employees are excited about the possible return. Others believe the employee is being rewarded despite the disruption caused by their departure.

Decision to make:

Should the practice rehire this person, and if so, under what conditions?

CLIMB Application

C — Culture Alignment

Would bringing this person back strengthen or weaken the culture the practice is trying to build?

L — Leadership Lens

What has changed since the employee left? What did leadership learn from the original employment relationship and departure?

I — Issues & Outcomes

What are the possible effects on team trust, morale, attendance expectations, compensation, and future retention?

M — Manage Risk

What conditions should be established before rehire, including role expectations, attendance standards, compensation, introductory-period goals, training requirements, or behavioral expectations?

B — Balance & Buy-In

How should leadership communicate the decision so the team understands that it is based on current business needs and clear expectations rather than favoritism or desperation?

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Scenario 5: The Office Manager as the Bottleneck

The office manager handles nearly everything: scheduling problems, insurance escalations, supply ordering, employee questions, patient complaints, payroll corrections, onboarding, performance concerns, and communication with the doctor.

Because so much information lives in the manager's head, team members wait for answers before taking action. Small issues pile up when the manager is out of the office, and employees frequently say, "We have to ask the office manager."

The manager knows they need to delegate and create better systems but worries that mistakes will increase, patient service will suffer, or the doctor will hold them responsible if someone else makes the wrong decision.

Decision to make:

What should the office manager stop doing personally, delegate, systematize, or escalate to the practice owner?

CLIMB Application

C — Culture Alignment

What kind of culture is created when every decision and problem must run through one overloaded manager?

L — Leadership Lens

Is the manager protecting quality, or unintentionally limiting team development and practice growth by holding onto too much?

I — Issues & Outcomes

What happens if the manager continues carrying everything? What happens if duties are delegated without sufficient training, authority, or accountability?

M — Manage Risk

What standard operating procedures, checklists, role clarity, approval limits, cross-training, or escalation rules would make delegation safer?

B — Balance & Buy-In

How can the manager involve the team in building better systems rather than simply transferring an overwhelming list of tasks to other employees?