

Organizing for Success:

Get Your Team Rowing
in the Same Direction

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Classic Practice Resources

Think back to when you were in dental school and dreamed about having your own practice. You were excited to start your new career and begin reaping the rewards for all of your hard work. Fast forward to today. Is it the way you thought it would be or do you feel continuous stress and frustration?

If you are like the majority of dentists, you face problems with patients and employees on a regular basis. You prefer the technical aspect of your career; it's the practice management that keeps you up at night. Your schedule is unpredictable, staff costs are soaring, your income fluctuates, your practice is out of control and you feel like you are on a roller coaster.

It's not unusual to hear dentists say that they are overloaded with the immensity of getting their team organized and productive. These problems, if left unhandled, are costly and will not go away on their own. When you are stressed at work, you are stressed at home. When you have money concerns at the office, you have money concerns at home. Your life can become more predictable, once you gain control over your practice.

Most practices are operating without a business plan and they count on "good luck" to get through the day. *Dentists and office managers try to manage people, when they need to focus on managing the systems and the desired outcome.* Utilizing basic management tools will help make your team more productive, while raising the morale in your practice. Create a foundation with a vision and systems that give you direction and predictability. You simply manage the systems, along with the results they produce. Once you establish a practice vision, how you want your office to run, find the right people to follow your systems, then office life becomes a lot easier and more enjoyable.

The following steps should get you started on creating organizational systems that will help you alleviate stress and get you on the road to becoming more organized. Once you get started

you will find that it is not as difficult as you thought. Start the transition by implementing the following and including your team in each step. It's your practice; you are the captain of the ship. It's time for you to muster up your crew to work with you on reaching your practice goals; you can't do it alone.

Step 1: Create a Practice Vision and Goals

I have seen dental teams transform in front of my eyes by sitting down together and creating a statement about where they, as a team, would like to see the practice in the near future. You might be surprised at the positive input your team could have in an exercise like this.

The vision, when written with your team, brings a unified direction for everyone to move in. It will help change focus and habits, which allow you to change results. The practice vision is a statement of what you want the business to become. It helps you take better control of your business and the decisions you make. Most importantly, it allows you to overcome outside influences that hamper practice success.

As you are creating your vision, evaluate each aspect of the practice and visualize the end result. Consider the following:

- 1) What do you want the practice to be like in the near future?
- 2) What would make patients choose your practice over the competition?
- 3) How do you want your patients to perceive the practice?
- 4) How do you want the team to fit into the big picture?
- 5) What new procedures and/or new technology would you like to add?

Once you have all of your thoughts written down, begin to put them in a single phrase to describe your entire vision statement. When you are done, frame your vision and hang it in the staff lounge. Start your staff meetings off by reading it and update it when necessary.

Setting Practice Goals

After you have written your practice vision, you and your team will need to list out the goals that will get you to the desired outcome. They need to be achievable rather than a “pie-in-the-sky” dream. Naming unachievable goals adds more frustration and creates low morale. The goals that you should list out are short-term goals. It’s important that you and your team review your progress on a regular basis. The list will need to be updated as you progress and new goals are added to replace the ones you accomplish.

Step 2: Develop a General Office Policy Manual

The next step to organizing your practice and getting your team rowing in the same direction, is putting together guidelines for staff to follow. Your practice will not be able to implement systems and have them stay in place without standardized office policies to eliminate misunderstandings.

Can you imagine football without any rules? What about driving in rush hour traffic with no laws on what to do when a light turns red or green? The obvious result would be confusion and chaos. In a dental office, if there are no guidelines for employees to follow, they would not know what is expected of them. Frustration, confusion and unnecessary disagreements are likely to ensue.

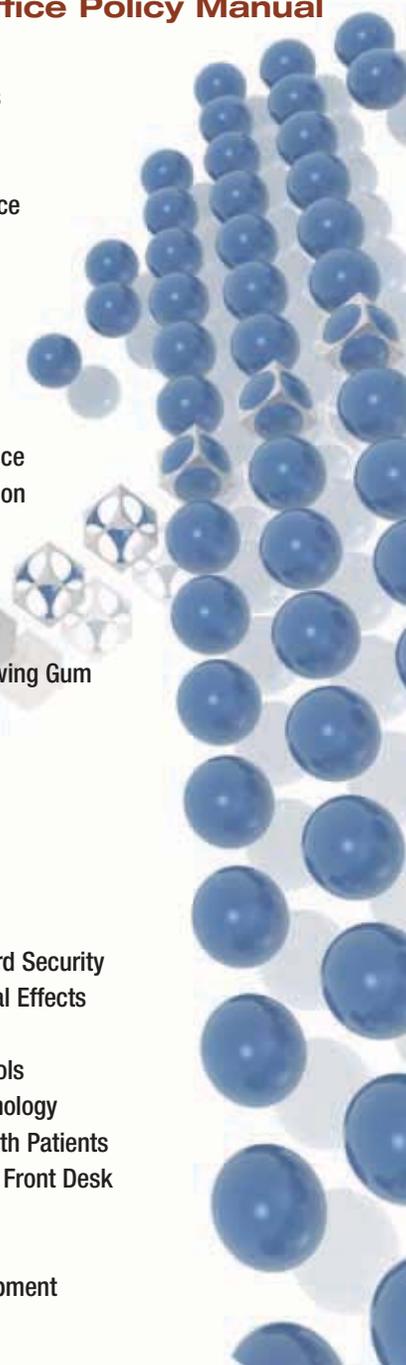
A lot of the stress that dentists experience is due to the lack of guidelines and agreements in the practice. Some have the guidelines and never implement them or insist that they be followed. The quickest way to show your staff that you are not serious about the policy manual is to not reference it or not have them learn the policies. In the future when someone asks you for a six-week paid vacation and the policy says they get two weeks, you will have a way to handle it. You will reply in a caring voice, “What does the policy say?” or “Go get the policy, let’s look at it.” They will get the idea.

Carefully drafted and standardized policies save the practice countless hours of management time. They help an organization run at its most efficient and effective level. That alone will bring value through cost savings and additional revenues.

I have listed the key areas that should be covered in a General Office Policy Manual for a dental practice (at the right). Your manual should have a policy to address each area, customized for your practice. This list will get you started and you can add to it as things come up in your practice.

Once you create your policy manual, print it and save the file on your computer. You will need to access it in the future as you update the manual. When you are ready to present the manual to your team, attach a form listing all of the policy names. Have them sign off on each policy as they read through the manual. Store this form in their employee record so you can track their training progress. The manual should be read by all employees. New employees should receive it on their first day of employment.

Key Areas to be Covered in a General Office Policy Manual



- Benefits
- Employee Reviews
- Confidentiality
- Tardiness
- Drug-free Workplace
- Absenteeism
- Telephone Use
- Office Appearance
- Reprimands
- Formal Warning
- Time-off Requests
- Personal Appearance
- Continuing Education
- Training Request
- Staff Meetings
- Kitchen Etiquette
- Food Consumption
- Smoking and Chewing Gum
- Dress Code
- Name Tags
- Greeting Patients
- Office Keys
- Alarm System
- HIPAA
- Computer Usage
- Computer Password Security
- Storage of Personal Effects
- Work Orders
- Emergency Protocols
- Appropriate Terminology
- Communicating with Patients
- Distractions at the Front Desk
- Solicitation
- Parking
- Supplies and Equipment
- Basic Guidelines

Step 3: Make a Team Agreement

One attribute that all successful organizations share is having a team that functions well together. If you are serious about building your “Dream Team,” consider a Team Agreement. It helps clarify exactly what is expected from each team member and the way they communicate and rely on each other as a team. It holds one another responsible and it eliminates

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assumptions about what is expected. It increases trust and prevents you, the doctor, from having to take on the role of referee. The Team Agreement includes shared agreements that they originated and that is what makes it successful. It's important that your Team Agreement be created by you and your team. It will not be successful without everyone's agreement.

To get started you should set up a time to meet. Explain the concept to the group. Ask each person to list five things they believe a successful team does or does not do to work harmoniously together, while achieving their goals. You will work with them to create the agreement, but allow them to come up with the majority of the content. They should list out things that are important to them.

Once you have completed your Team Agreement, have everyone sign a copy and turn it in to you. They can make a copy to keep at their work area. This activity, like the practice vision, will bring your team closer together. Some practices keep theirs in the General Policy Manual binder and read it at the beginning of every staff meeting. Some practices frame it or keep it in the lunchroom. The most important thing is that you reference it and use it anytime there is a confrontation or someone gets upset. If the Team Agreement accentuates the strengths of the group, protects the interests of the practice and prevents conflict among the team, it will serve its purpose.

Step 4: Have Productive Staff Meetings

Effective leaders see the value in gathering their team for a staff meeting. Your meeting will have a better outcome if you have a planned agenda. Know in advance what will be covered. If you are serious about the meeting your staff will develop the same viewpoint. Mark off time for your meetings for the next couple of years. This is an important appointment that you have with your team and it should not be cancelled. A couple of hours during the first week of each month will be sufficient.

Tips for Successful Staff Meetings:

- 1) Teach something
- 2) Practice skills
- 3) Share good news
- 4) Solve problems
- 5) Review statistics
- 6) Keep it positive

Step 5: Create Job Descriptions

Dentists and staff report frustration due to lack of accountability and uneven distribution of the workload. The door was left unlocked, the statements didn't get mailed, the answering machine was not turned on and the trash didn't get taken out, because no one was officially in charge. Every practice needs job descriptions listing out the responsibilities and duties that go with each position. They help you align employee direction with

the practice vision and goals. They also assist employees with becoming more focused. Job descriptions become communication tools that are significant in your organization's success.

Have your team work with you on creating their job descriptions. You should have the final approval. Start with a written statement that describes the duties and responsibilities, qualifications, education, prior training, knowledge and skills required for the job. Make sure the physical requirements of the job are clear and accurate. Have them list out all of the duties that they perform.

This can be a fun and rewarding project for the entire team. It is another layer of organization and establishment of your practice.

Conclusion

The majority of doctors contacting me about problems in their practice have never taken the necessary steps to get organized. They tell me that they don't know how to get started with building a team. After completing the five steps outlined above, you should be feeling more confident about your leadership and your practice. These steps will help support, empower and inspire your team through the process.

As the leader, you want to inform your team how they fit into the big picture and show them the benefits of rowing in the same direction. Let them know that you care about them and appreciate their efforts. Focus on team building, staff training, improving skills and letting your staff know when they do a good job. Take time to write a personalized note to each one at the end of the year or on the anniversary of their employment, letting them know that you appreciate their hard work and loyalty. This type of leadership has a positive impact on employees and ultimately your business. Remember their birthdays, anniversaries and milestones. Acknowledging staff and keeping them motivated is often forgotten. These are the people that help you make it happen. They are counting on you, don't let them down. ■

Author's Bio

Sandy Pardue is an internationally recognized lecturer, author and practice management consultant. She has assisted hundreds of doctors with practice expansion and staff development over the past 20 years. She is known for her comprehensive and interesting approach to dental office systems, and offers a refreshing point of view on how to become more efficient and productive in a dental practice. Sandy is director of consulting with Classic Practice Resources. She is also a consultant to leading dental companies for product evaluation and design. For more information, please e-mail sandy@classicpractice.com.

