

Effectively Evaluating Your Team



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When it comes to managing a dental practice, the key components are people, time and money. Each component is important in its own right, but when I lecture, the questions I hear the most deal with people – more specifically, “How do I hire a great team?” Human relations (HR) is without a doubt the toughest aspect of every business. Finding and retaining the right team players is critical to running a successful practice. If you have the wrong person or people on your team, business always takes a turn for the worse.

At Today’s Dental, we require potential applicants to schedule a two-day working interview. We have found out over the years that one day is not sufficient enough to find out if an applicant will work well in your practice. During the working interview the applicant not only observes but is required to interact with the patients and staff, “jump in” to assist the doctor in the back office and even answer phones at the front desk. Hygienists are scheduled two full days with patients but will be assisted with the computer software and our office protocol since they have not had training in those areas. We will select our new employee based on the feedback from the entire department on how well s/he performed during the working interview.

A key component to building a great team is making sure you hired the best people to stay with your business long term. Periodic evaluations of your staff are critical to be sure you have the right people in place.

When we hire someone, s/he is given two to five days training, depending on the department s/he is in. During that time we go over the new employee’s job description and office procedures to ensure s/he is fully trained before starting work. Once this new employee starts working, we evaluate how s/he fits in with the rest of the staff and his/her ability to effectively carry out what s/he learned during training. If this person is performing well within the first two weeks, the next written evaluation is done after 90 days of employment. The initial training and analysis of the employee is performed by the office manager and subsequent reviews are performed by the department supervisors who work closely with him/her on a daily basis. However, if a problem occurs, our office policy is to address it immediately rather than wait until this employee’s next review. In addition to the initial 90-day review, our employees receive an annual review by their department supervisors. These evaluations do not always have salary increases attached to them; they are gauges on the performance of our team. However, if you have an employee who is doing an outstanding job, s/he should be financially rewarded with a merit increase.

I have read many books on this subject over the years but the two I often recommend are *The Gifted Boss* by Dale Dauten and *Good to Great* by Jim Collins. These two books have given me priceless insight into building a great team and a successful company.

If you do not use formal written evaluations in your practice or if you want to compare what you’re currently using, please take a look at the sample form we use at Today’s Dental on pages 12 and 14. In order to retain excellent employees long term, I cannot stress enough how important it is to provide adequate training along with detailed job descriptions to ensure expectations are communicated. When you follow up with regular evaluations and reward those who exceed your expectations, you can sleep easier knowing you have the right team in place. ■

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TODAY'S DENTAL PERFORMANCE EVALUATION

NAME: _____ DATE: _____

TITLE: _____ DEPT: _____ EMP # _____

1. KNOWLEDGE OF WORK: CONSIDER KNOWLEDGE AND UNDERSTANDING OF ALL PHASES OF THIS AND CLOSELY RELATED JOBS.

- 5 – HAS A THOROUGH KNOWLEDGE OF JOB ASSIGNED AND RELATED JOBS.
- 4 – WELL INFORMED ON ALL PHASES OF JOB ASSIGNED AND RELATED JOBS.
- 3 – HAS A GOOD WORKING KNOWLEDGE OF THE JOB ASSIGNED.
- 2 – HAS FAIR KNOWLEDGE BUT NEEDS MORE TRAINING OR EXPERIENCE.
- 1 – NEEDS FREQUENT INSTRUCTION, EVEN ON ROUTINE JOBS.

COMMENTS: _____

2. QUANTITY OF WORK: CONSIDER VOLUME OF WORK PRODUCED, BASED UPON RECGONIZED STANDARDS OF PERFORMANCE REQUIRED.

- 5 – HIGH VOLUME OUTPUT OF WORK AND SEEKS OTHER WORK WHEN ASSIGNED WORK IS NOT AVAILABLE
- 4 – CONSISTENTLY TURNS OUT MORE VOLUME THAN MOST. IS A PACESETTER.
- 3 – STEADY PRODUCER. REGULARLY MEETS RECOGNIZED STANDARDS OF WORK.
- 2 – FAIR AMOUNT, HOWEVER QUANTITY SHOULD BE INCREASED.
- 1 – CONSISTENTLY LOW ON QUANTITY OF WORK AND IS USUALLY BEHIND SCHEDULE.

COMMENTS: _____

NOTES:

3. QUALITY OF WORK: CONSIDER ACCURACY, NEATNESS AND THOROUGHNESS WITH WHICH WORK MEETS RECOGNIZED STANDARDS OF PERFORMANCE.

- 5 – CONSISTENTLY MAINTAINS THE HIGHEST QUALITY. EXCEPTIONALLY ACCURATE, NEAT AND THROUGH.
- 4 – WELL ABOVE AVERAGE IN ACCURACY, NEATNESS, AND THOROUGHNESS. SELDOM NECESSARY TO CHECK WORK.
- 3 – MEETS RECOGNIZED STANDARDS OF QUALITY REGULARLY. NORMAL FOLLOW UP REQUIRED TO CHECK WORK.
- 2 – USUALLY ACCEPTABLE BUT REQUIRES MORE THAN NORMAL CHECK UP.
- 1 – BELOW STANDARD. REQUIRES CONSTANT CHECKING.

COMMENTS: _____

4. INITIATIVE: CONSIDER THE INDIVIDUAL'S ORIGINALITY, SELF-RELIANCE AND MOTIVATION REQUIREMENTS TO GET THE JOB DONE.

- 5 – EXCEPTIONALLY ORIGINAL AND SELF-RELIANT. OFTEN SUGGESTS NEW IDEAS AND TECHNIQUES.
- 4 – DEMONSTRATES ABOVE-AVERAGE ORIGINALITY AND SELF-RELIANCE IN PERFORMANCE OF DUTIES. A "SELF STARTER."
- 3 – DEMONSTRATES NORMAL ORIGINALITY AND SELF-RELIANCE.
- 2 – DEMONSTRATES LITTLE ORIGINALITY IN PERFORMANCE OF DUTIES.
- 1 – LACKS ORIGINALITY AND SELF-RELIANCE. NEEDS CONSTANT GUIDANCE.

COMMENTS: _____

5. DEPENDABILITY: CONSIDER ABILITY TO GET ASSIGNMENT WORK DONE PROMPTLY AND CORRECTLY WITHOUT FOLLOW-UP.

- 5 – THOROUGHLY RELIABLE ON ALL ASSIGNMENTS REGARDLESS OF DIFFICULTIES. ALWAYS DOES AN EXCELLENT JOB.
- 4 – DEPENDABILITY WELL ABOVE AVERAGE. ALWAYS DOES A GOOD JOB.
- 3 – DEPENDABILITY IS GOOD. CAN COUNT ON THE RESULTS OF WORK.
- 2 – FAIRLY DEPENDABLE BUT REQUIRES MORE THAN NORMAL AMOUNT OF FOLLOW UP.
- 1 – INFREQUENTLY DEPENDABLE. REQUIRES CLOSE SUPERVISION.

COMMENTS: _____

6. COOPERATION: CONSIDER THE INDIVIDUAL'S INTEREST IN WORK AND WILLINGNESS TO COOPERATE WITH SUPERVISION AND ASSOCIATES.

- 5 – EXCEPTIONALLY INTERESTED. GOES OUT OF THE WAY TO COOPERATE AND PROMOTE COMPANY INTERESTS.
- 4 – WELL ABOVE AVERAGE INTEREST. WORKS WELL WITH SUPERVISION AND ASSOCIATES.
- 3 – GOOD INTEREST. USUALLY COOPERATES WITH SUPERVISION AND ASSOCIATES.
- 2 – AVERAGE INTEREST. OFTEN COOPERATES BUT HAS SOME DIFFICULTY WORKING WITH SUPERVISION AND ASSOCIATES.
- 1 – FAIR INTEREST. RELUCTANT TO COOPERATE WITH SUPERVISION AND ASSOCIATES.

COMMENTS: _____

7. PERSONAL HOUSEKEEPING: CONSIDER THE INDIVIDUAL'S ATTENTION TO MAINTAINING AN ORDERLY WORK AREA.

- 5 – AREA IS EXCEPTIONALLY ORGANIZED, NEAT AND TIDY.
- 4 – ABOVE-AVERAGE ATTENTION TO AN ORDERLY WORK AREA.
- 3 – USUALLY NEAT AND ORGANIZED.
- 2 – A TENDENCY TO BE CARELESS AND UNTIDY.
- 1 – NO ATTENTION GIVEN TO WORK AREA. DISORGANIZED AND UNTIDY.

COMMENTS: _____

8. ATTENDANCE/PUNCTUALITY: CONSIDER ABSENTEEISM AND PROMPTNESS IN REPORTING TO WORK.

- 5 – ALWAYS AT WORK AND ON TIME. REGULARLY VOLUNTEERS FOR OVERTIME.
- 4 – VERY PROMPT AND REGULAR ATTENDANCE.
- 3 – NORMALLY PRESENT AND ON TIME.
- 2 – OCCASIONALLY ABSENT AND LATE FOR WORK.
- 1 – UNRELIABLE. FREQUENTLY ABSENT AND/OR LATE.

COMMENTS: _____

9. HOW DO YOU SUMMARIZE THE OVERALL PERFORMANCE OF THIS EMPLOYEE?

- 5 – CONSISTENTLY DISPLAYS EXCEPTIONAL ABILITY.
- 4 – NOT ONLY FULFILLS ALL REQUIREMENTS, BUT ALSO OFTEN DISPLAYS ABOVE-AVERAGE ABILITY.
- 3 – FULFILLS ALL REQUIREMENTS; IS A COMMENDABLE EMPLOYEE.
- 2 – USUALLY FULFILLS BASIC REQUIREMENTS BUT FALLS SHORT OF ACCEPTABLE PERFORMANCE.
- 1 – FALLS SHORT OF ACCEPTABLE PERFORMANCE AT THIS TIME.

10. WHAT ARE EMPLOYEE'S GREATEST STRENGTHS?

11. WHAT ARE THE EMPLOYEE'S WEAKEST AREAS?

12. FUTURE PERFORMANCE OBJECTIVES:

RATED BY: _____ DATE: _____

I CERTIFY THAT THIS EVALUATION HAS BEEN DISCUSSED WITH ME AND I HAVE NOTED ANY POINTS OF DISAGREEMENT:

EMPLOYEE SIGNATURE _____ DATE: _____