



PERFORMANCE REVIEWS – HOW TO MAKE THEM GREAT!

What is a powerful leadership tool for you, the doctor, and a great learning experience for the employee? The answer is... a well done employee performance review! Most doctors either completely avoid this necessary leadership skill or do it poorly because it feels confrontational and they simply do not have a format to follow. Therefore, they miss a valuable coaching opportunity with their employees.

The performance review creates the perfect setting to share verbal appreciation about the employee's unique strengths and serves as a conduit for constructive coaching about any behavior that you would like to see changed. Employees need to hear this type of feedback in order to perform at the level of your expectations. Research has shown that employees want to feel that their presence is valued by their employer and contributes a positive difference that is recognized.

By following the steps listed in this article, the performance review will become a positive learning experience for you and the employee, as well as taking the employee's performance to the next level.

Time and Place

A well done performance review is a powerful communication tool and should not be something that is done off the cuff and without preparation. When it is done right, the evaluation can be just as valuable as a day of training or continuing education.

A performance review should be done annually for employees who have been with the practice for more than one year. A new employee should be given feedback on his/her performance once a week during the first month, then on the 60th and 90th day, and once again at his/her six month anniversary. By sharing more frequent feedback, the new employee has the chance to be more successful in his/her job because the clarification of what is working well and what still needs to be changed is clearly addressed.

Here are a few tips:

- Treat the review like any other important meeting by setting up a time and date. Set aside at least 45 minutes.
- Do not put the review off by constant re-scheduling; this is a significant event on your employee's calendar and rescheduling sends a message to the employee that spending this time with him/her is not important to you.
- Meet in a quiet and private room to avoid interruptions and respect the privacy of the information that is being exchanged.
- Sit on the same side of a table, if possible, to be less threatening. An employee who feels safe and relaxed is more receptive to suggestions and is more likely to give useful feedback.



Have the Employee Review Himself / Herself

A week before the review date, give your employee a review form to evaluate his/her own performance and then ask the employee to return it to you. This gives you time to understand what level of performance the employee thinks he/she has achieved and prepares you on how to coach the employee best in whichever area is needed. By exchanging this information ahead of time, it takes the confrontational feelings out of the review because you walk into the meeting knowing what needs to take place. Many practice management consultants have forms available that list the areas that should be evaluated within a performance review. It is also beneficial to use a form that asks the employee to identify what his/her goals and challenges are for the next year. This information helps you create an atmosphere for the employee to continue to grow, thrive and succeed.

Taking Performance to the Next Level

By having the verbal skills in hand about how to tell an employee that you would like him/her to do something differently, you will be more successful in exchanging this type of information. Think of the performance feedback as positive coaching, which will help employees become more successful. Remember that the goal of the review is to improve things not just to enumerate the problems.

- **The wrong way:** “We’ve got a problem here....”
- **The right way:** “I want you to know that I am especially pleased with...”, “Where I would like to see you concentrate for the next few months is...”, “The next level I would like to see you take your performance to... I’m confident that you have the ability to do an outstanding job. Please let me know how I can help you achieve this goal.”

Also, remember to be very specific when you discuss the change that needs to take place.

When performance changes are requested of an employee, there are three questions that you should ask in order to receive insight into whether

or not the employee will be successful with the request. You could ask for example: “Is this a change you want to make?”, “Is this a change you think you can make?” and “What kind of help do you need to make this change?”

It is useful to set up another meeting in the near future to review the progress that the employee is making in taking their skills to the next level. Ongoing, positive coaching is the best communication tool to help your staff become high performance members of your dental team. In the last issue of *PMM*, we discussed coaching verbal skills more extensively; you may want to refer to that article for more information on this topic.

Set Benchmarks

Each job should have understandable benchmarks of acceptable performance and this must be communicated to the employee. For example, the person in charge of collections should be collecting 98 percent of production with an accounts receivable to production ratio of 1:1, and no more than 18-25 percent of the accounts receivable should be over 90 days. If any one of these criteria is not being met, then the employee will know exactly where to concentrate and improve. Benchmarks can also be set for scheduling and clinical performance.

Raises

It should be made clear to employees that annual raises are given by making themselves more valuable to the practice through improved skills and a motivated attitude, and not for just being there another year. The raise does not have to be timed to the annual review. It can also take place at a set date after the review when the requested performance changes have been achieved.

Documentation

Document dates, times and information are exchanged at all meetings with employees when job performance is discussed. This is important to refer back to in the event that performance improvement has been requested and is not accomplished by the employee.



Benefit to Doctor

You will know that the review was successful if you both leave the meeting feeling that a new level of communication and trust has been established. Also, success is achieved when you see the employee's performance reach a higher level. When

the employee's overall performance improves, it leads to less stress and a higher functioning dental team. Thus, this creates increased profits to help support raises, benefits, practice improvements and your bottom line!

A Performance Review System That Works!

The Complete Performance Review Kit only \$75

- *Customized Performance Review forms for staff:*
 - *Front Desk*
 - *Assistant*
 - *Hygienist*
 - *Office Manager*
- *Forms for documenting requests for performance changes*
- *Mid Year Performance Review form*
- *Employee Training Record*

For more information, visit www.julieweir.com/staff.htm. Or, call Julie at 303-660-4390.

JULIE WEIR
TAKE *the* LEAD

Management Consulting • Success Products • Speaker • 303-660-4390 • JulieWeir.com



American Academy of Pediatric Dentistry
211 E. Chicago Avenue-Suite 1700
Chicago, IL 60611-2637

PMM News



Published four times per year as a direct membership benefit by the American Academy of Pediatric Dentistry (AAPD), 211 E. Chicago Avenue, Suite 1700, Chicago, IL 60611-2637, (312) 337-2169. Copyright©2007 by the AAPD. All rights reserved. ISSN 1064-1203. aapdinfo@aapd.org, www.aapd.org. Writer: Julie Weir has built an outstanding reputation as a consultant, international speaker and author in the business of dentistry. Opinions and recommendations are those of the author and should not be considered AAPD policy.

Executive Director
Dr. John S. Rutkauskas

Publications Manager
Cindy Hansen

Publications Associate
Adriana Loiza

Public Affairs Coordinator
Marianthi Bumbaris