

## CASE STUDY #8: Head in the Sand Leadership

This is a classic case of a conflict avoidant doctor that kept her head in the sand and hoped the practice problems would resolve themselves or just go away. She thought her practice just needed a few tweaks to get it to perform better. However, she found out that her conflict-avoidance only made the problems escalate and that stronger leadership skills and more defined systems were needed to reduce stress and increase profitability.

### Practice Profile

- A one doctor pediatric practice started 25+ years ago. Current owner purchased the practice in 2012 and inherited all staff
- The doctor works four days per week and also has two IV sedation days per month
- Eight chairs: three restorative and five recare
- Staff: one office manager, three front desk, four chairside assistants, one hygienist
- Only in network with Delta PPO, Guardian and Medicaid
- Average monthly production: \$120,913 — 30 percent was from Medicaid
- Average monthly collection: \$118,495
- Fees are charged at reduced rate for Medicaid and PPO. Full fee charged to all other patients
- Average monthly new patients: 45

### Doctor Concerns

- Too many broken appointments, no shows and last minute cancellations
- Schedule looks full at the beginning of day, but many appointments fail by the end of day causing the daily production goal to be reached only 25 percent of the time
- Parents not committing to treatment and not arriving at scheduled times
- Low team morale: drama, gossiping, fingers pointing, unclear expectations, entitlement attitudes and not communicating well with one another
- Office manager ineffective
- Low number of new patients

### Findings

#### Leadership

- No culture of excitement and everyone looking forward to coming to work
- Doctor lacks leadership skills and the ability to effectively deal with daily challenges
- Doctor wants to be everyone's friend. She is conflict-avoidant and does not want to upset staff members. When the doctor held employees accountable, they cried or pushed back and the doctor would give in and not address the problem
- Office manager did not have the right leadership strengths and skills to be successful in the position
- The practice had a mission statement but the team did not understand the doctor's vision because it had not been clearly shared with them

- Doctor did not have a business plan
- Team did not know practice goals to work toward
- No practice vital signs were monitored
- Doctor did not do annual performance reviews
- No written job descriptions
- Anytime the doctor tried to meet with the team, there would be disagreements and lack of conflict resolution skills so meetings became ineffective

#### Team Dynamics

- Poor team morale
- There was a lot of gossip and disrespect about the doctor and each other
- The clinical team did not trust each other because it was a cutthroat culture where they would throw each other under the bus or be jealous instead of celebrating each other's differences and appreciating what the other had to offer
- Office manager caused division between the clinical team and front office team because of how she treated them

#### Facility/Presentation

- Office appearance in good shape
- Doctor kept it well decorated and up-to-date
- Large reception and nice play area for patients
- New patients seen in their own private room and treated well

#### Front Desk Efficiency

- Checkout person was very frustrated because she was doing the majority of the work and picking up duties that the office manager should have been doing: entering insurance payments, accounts receivable, presenting large treatment plans and making sure everyone was doing their best to keep the day flowing
- Patients rescheduled and failed their appointments multiple times. There was no appointment policy in place that would minimize no-show or short notice cancellations

#### Scheduling/Production

- No block scheduling used
- No daily producer goals (doctor, recare or sedation) used for scheduling accountability
- No accountability to maintain a full schedule
- Schedule ran behind due to poor scheduling and congestion with check in/out and new patient consults
- Morning meetings consisted of reviewing the schedule for the day and discussing any potential problems

### Marketing

- Outdated logo and printed material
- Outdated website. Poor search engine optimization
- Minimal to no external marketing actions in place
- No internal marketing being done, staff did not know how to ask for referrals
- Social media was barely updated
- Online reputation management was not maintained since no one knew how to do it
- No tracking of referrals

### Leadership Recommendations

- Doctor shares her vision for the practice with the team
- New practice and team mission statements were created
- Leadership training for the doctor and office manager on how to effectively hold staff accountable for their job performance
- Team dynamics training utilizing the Professional Dynametric Programs trait profiling of each team member's strengths and communication style. This will help team members to better understand each another and appreciate each other's differences and unique abilities
- Create a practice business plan that defines:
  - Break-even point to identify the collection level required to support overhead expenses, doctor income and retirement savings
  - Practice goals to support the break-even collection total: average number of doctor, recare and sedation work days/month
  - Average daily production for doctor, recare and sedation
  - Collection ratio
  - Average number of new patients/month
  - Raise fees to a competitive level
  - Overhead budget and monthly budget amounts for team members that order front office and dental supplies
- Monitor practice vital signs and goals
- Annual performance reviews performed
- Hold morning meetings, monthly team and quarterly department (clinical, front office, leaders and marketing) using an action plan form to follow up on the changes discussed

### Team Dynamics Recommendations

- Establish specific roles and duties for each team member to assign accountability
- Discuss revised job descriptions with each team member
- Conflict resolution training with team

### Front Desk Recommendations

- Create an effective appointment policy and train staff on proper verbiage to minimize no-show or short notice cancellations
- Train staff on more thorough utilization of the dental software
- Train staff on the proper setup of insurance plans, coverage tables and payment tables in the dental software so patient portion estimates are accurate

### Scheduling/Production Recommendations

- Schedulers given daily doctor, recare and sedation production goals to meet
- One front desk staff member assigned to the operative schedule and another to the recare schedule for accountability in keeping it full and meeting the goal
- Move the presentation of extensive treatment plans and IV sedation appointments away from the front desk to relieve the back up
- Create a block scheduling template to meet producer goals and give a good flow to the day. Operative appointments scheduled for either 30 or 50 minutes depending on the amount of work and child's behavior to help the schedule run on time
- Clinical team enters full treatment plan into the patient's computerized record to keep track of diagnosed treatment not completed
- Assign specific staff members to work the past due recare and unfinished treatment plan reports weekly. Create uninterrupted work time specifically for them to complete this task
- Assistants and hygienist review operative and recare patient charts for medical alerts and needed radiographs the day before
- Assign clinical coordinator to oversee patient flow and guide clinical team members so appointments are completed in a timely manner

### Marketing Recommendations

- Create new logo and practice branding
- Update printed material with more current information
- Update website and increase search engine optimization
- A marketing team was created to make sure all areas of marketing were covered: internal, external and online presence
- Post daily on social media. Fun/theme day pictures and raffle contests became such a hit, that parents requested for theme days to be posted on website so they could view them ahead of time and dress up their kids
- Regularly visit professional referral sources to supply more educational material for their patients on preventive care and the importance of a Dental Home
- Train team on verbal skills to let parents know the practice is always taking new patients
- Train team on verbal skills of the importance of each procedure so they can better instill in all parents the value of keeping their child's appointments
- Track new patient numbers on a monthly basis



### Post Coaching Results

- Office manager was coached but not willing to make the needed changes in her skills to be a more effective leader and create practice growth. She was replaced with the checkout person who was doing some of the office manager's duties all along. The new office manager exceeded expectations. Although she had never managed before, she was successful and effective with the coaching, support and guidance she was given
- Doctor and new office manager began addressing practice issues in a timely manner and held employees accountable to meet defined job descriptions and practice vital signs
- Practice business plan and goals were created
- The team's morale increased. They felt more effective in their roles when they understood the doctor's vision and had goals and new skills to work with
- Production increased 38 percent by an additional \$46,100/month
- Collections increased 28 percent by an additional \$32,561/month
- New patients increased 56 percent by an additional 25/month
- Efficiency and collections increased at the front desk with the increased utilization of the dental software
- No-shows and cancellations decreased

- New logo, website, educational material and practice branding created
- Social media presence at all-time high
- Doctor took her leaders to a leadership training course and the leadership team grew in their confidence to be able to handle the team and practice challenges
- The doctor now enjoys going to work every day because she has an office manager who oversees the team and systems. She also realizes it's so much better to lounge on a beach chair on top of the sand, instead of having her head in the sand

### What You Should Learn From This

- Practice problems and poor performers do not fix themselves; they only get worse holding back production and collection while increasing the team's stress
- The doctor and office manager must hold employees accountable in a timely manner for proper job performance
- Run your practice like a business with a business plan that defines and monitors set goals
- Have a strong marketing system: good logo, branding, effective website and search engine optimization, social media presence and internal and external marketing actions

"The greatest revolution in our generation is the discovery that human beings, by changing the inner attitudes of their minds, can change the outer aspects of their lives"

~ William James (1842-1910)

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