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## Seven Steps for Powerful Performance Reviews

Effective performance reviews have many benefits for your team: improved communication, time to give and receive feedback, improved performance, goal setting and more. Most doctors avoid this necessary leadership tool or do it poorly because it feels confrontational. Sometimes, they do not have a format to follow, thus missing 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 constructive coaching about any behavior the doctor wants to see changed. Employees need to hear this type of feedback to perform at the level of the doctor's expectations. Research has shown that employees want to feel their presence is recognized and valued by their employer and contributes a positive difference.

By following the steps listed in this article, the performance review will become a positive learning experience for the employee and the doctor and take the employee's performance to the next level while also strengthening your practice's culture and reinforcing its values.

### 1. Schedule a Performance Review Meeting

- A performance review is a powerful communication tool and should not be done without preparation. When done correctly, the evaluation can be just as valuable as a day of training or continuing education.
- A performance review should be done annually, at the minimum, for employees who have been with the practice for more than one year. It is important to remember to check-in with your employees frequently throughout the year, not just at their annual performance review. Providing continuous feedback with your employees can lead to increased efficiency and engagement.
- A new employee should be given feedback on their performance once a week for the first month, then at 60 and 90 days, and again at six months. By sharing more frequent feedback, the new employee can be more successful in their position because the clarification of what is working well and what needs to be changed is made more clear.
- Treat the review like any other important meeting by scheduling a time and date to meet with the employee. Plan to meet in a quiet, private room to avoid interruptions and respect the privacy of the information that is being exchanged. Do not put the review off by rescheduling; this is a significant event on your employee's calendar. Rescheduling sends a message to the employee that spending this

time with them is not important to you. Be sure to schedule an adequate amount of time that allows both you and your employee to share feedback. No less than 45 minutes is recommended.

### 2. The Employee Reviews Themselves

- One week before the review date, give your employee a review form to evaluate their performance and then return it to the doctor. This allows the doctor to understand what level of performance the employee believes they have and how best to coach the employee in any needed area. In addition to the review form, give your employee a form to list goals for this year, improvements they want to make from the previous year, and things they need help with to achieve their goals. This information helps the doctor create an atmosphere for the employee to continue to grow and thrive. Many practice management consultants have forms available that list the areas that should be evaluated at a performance review.

### 3. Hold the Performance Review

- You will be more successful in communicating information about the performance review if you have the appropriate verbal skills. Think of the performance feedback as positive coaching of the employee to help them succeed in their position. Remember, the goal of the review is to improve understanding and performance, not just to list 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... This is the next level I would like to see you take your performance to... I’m confident that you will do an outstanding job. Please let me know how I can help you achieve this goal.” Treat the feedback you are giving your employee as an empowerment tool, not as a disciplinary action. Remember when discussing any changes that need to take place to be very specific.
- When performance changes are requested of an employee, the doctor should ask questions to help gain insight into whether the employee will succeed with the request. Ask; “Is this a change you can make?”, “Is this a change you want to make?”, and “What kind of help do you need to make this change?”
- It is beneficial to schedule a follow-up meeting to review the employee’s progress in taking their skills to the next level. Ongoing, positive coaching is the best communication tool for helping your employees become high-performing members of your dental team.

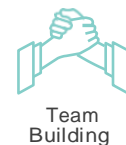
#### 4. Set Benchmarks

- Each position should have understandable benchmarks of acceptable performance, which 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 18-24 percent of the accounts receivable should be over 60 days. If any one of these criteria are not being met, the employee will know exactly where to concentrate their efforts to improve. Benchmarks can also be set for scheduling and clinical performance.

#### 5. When to Discuss Compensation

- It should be made clear to employees that annual raises are given for making themselves more valuable to the practice through improved skills and a motivated attitude, not for just being there another year. A pay increase does not have to be attached to the annual review. It can occur at a set date after the review when the requested performance changes have been achieved. Be sure to use a Total Compensation Calculator to show the employee the total dollar amount of their benefits included in their base pay.

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## 6. Keep Accurate Documentation

- Document dates, times, and information exchanged at all meetings with employees when job performance is discussed. If there is a request for performance change, be sure to document what was communicated and the next steps and date for a follow-up meeting. This documentation is a crucial tool to refer to if the performance improvement requested has not been accomplished by the employee.

## 7. Enjoy the Benefits from the Review!

- You will know the review was successful if you both leave the meeting feeling that a new level of communication and trust has been established and you see the employee's performance improve. Improved employee performance leads to decreased stress and a higher functioning dental team, thus creating increased profits to support pay increases, benefits, practice improvements, and the doctor's bottom line!

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**“Always treat your employees exactly as you want them to treat your best customers.”**

***Stephen R. Covey***



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