



ORTHO2

# Leading Through Delegation

by **Debbie Best**

**P**iloting a successful orthodontic practice – between building and maintaining a quality crew, monitoring systems and protocols, and consistently delivering excellent service to your first class passengers – is a full time job. With the right training, practice, and dedication one pilot can fly a small plane. Just as when you transition to a larger aircraft it takes more than one person to keep the plane in the air, it can be difficult for orthodontists to treat patients and manage all of the details needed to keep the growing practice above ground.

Whether you use a co-pilot to assist you or a crew armed with a comprehensive checklist and well versed in your practice philosophy, it is critical to create a support system to help you with management responsibilities allowing you to concentrate more fully on the overall well-being and treatment of your patients. Just like the co-pilot and crew of the airlines, each person must go through a detailed check list before the plane is ever moved.

During my consulting career I have been asked several times to develop and “name that position”, putting into place either an office manager or team committees to assist the doctor in leading the practice. The decision to either have one person in the leadership position or utilize multiple team members depends on how much and in what areas you are willing to relinquish personal, hands-on supervision to someone else. It all starts with hiring right and setting the foundation before you go to the next level.

Start by determining what responsibilities you are willing to turn over to someone else. What can you take off your plate to lighten your load? How much information are you willing to share with an employee or employees? Make sure you understand your emotional commitment to your vision and clarify your expectations to this right-hand person you will rely on.

Let's look at some of the leadership options that can be used to develop your practice. Commonly, in the average

to large size practices, a combination of scheduling coordinator, financial coordinator, treatment coordinator, clinical coordinator, lab, clinical assistants, records assistant, and a sterilization coordinator is used to cover practice responsibilities. Each position has its own systems, protocols, checks and balances, as well as a detailed job description to set the team up for success. Additional responsibilities can be assigned to team members depending on their expertise and your level of comfort. The added responsibilities might be combined with their current job description (Financial/Human Resource, Treatment Coordinator/Marketing, Clinical Assistant/ Ordering, Clinical Coordinator/CE Opportunities, etc.) or delegated to a committee who is made up of 2 – 3 team members.

When using the team committee concept determine in what areas of the practice you require assistance. Do you want to turn over some of the responsibilities in one area of the practice or implement changes in several areas over a period of time? Utilizing team committees can give you the opportunity to empower multiple team members instilling the attitude that the practice is everyone's “baby”.

The following are examples of team committees:

**Human Resource Committee** – Monitor vacation, sick days, holidays, personal time off (paid and unpaid), and making arrangements if you will be down a team member. The Human Resource Committee will be involved with performance reviews and making recommendations regarding future hiring, or expanding the employment opportunities for those employees who are not making the cut.

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**Marketing Committee** – The fun squad. This is your fun group of team members – people who can find laughter in difficult situations. The jar is half full, not half empty. Their marketing responsibilities encompass external marketing (DDS deliveries, school programs, community events, school sports, school lunch and learn presentations, etc.) as well as internal contests and programs for new and existing patients. (Please feel free to call me if you would like to get some ideas for fun and creative external and internal marketing.) They network with your referral sources to create your “Doctor Bible”, a compilation of information regarding their practice (personal information, office hours, services, insurance plans accepted, etc.) enhancing your partnership with referral doctors. Additionally this committee is responsible for decorating the office for holidays and special occasion.

**STOP.** Before you give your team a green light, establish your monthly budget. Typically 3-4% of your overhead is the average marketing expenditure in orthodontic practices – 1% for internal and 2-3% for external. Have your marketing committee put together your marketing plan (along with projected costs) for the next few months.

**Facility Committee** – Responsible for monitoring the building from the parking lot to every area in the office. Evaluate the appearance from the perspective of new and current patients (including the little guys who see everything from a different level.) They are responsible for bringing facility concerns to the doctor, including the cost and time required to get work done. It is their responsibility to coordinate work with the repairing company, fielding telephone calls, and scheduling work around patient hours so it can be done with minimal interruption to patients.

**The IT/Computer/Software Committee** – Responsible for computer software updates, computer trouble-shooting, and maintaining all equipment. They are also in charge of scheduling training sessions to keep the team abreast of changes.

**Uniform Committee** – No matter what way you look at it, it is next to impossible to get several women to agree on uniforms they all like. From the color is wrong, the style makes them look fat to I would not be caught dead wearing that; uniforms are a headache that can best be dealt with by someone other than the doctor. Save your energy for decisions regarding your patient’s clinical treatment.

**The CE Committee** – Compiles all continuing education opportunities for the team. From a two hour lunch and learn to a 3 day interactive workshop “Fun in the Sun” January 28 – 30, 2016 in Puerto Vallarta with myself, Rosemary Bray, and Carol Eaton, they make recommendations for courses that would benefit the patients and practice. They are responsible for putting together a budget of estimated costs along with the

desired outcome of the course.

Another option is to hire or promote someone from within the practice to act as your voice and right arm in the practice. The title of Office Manager often brings with it a negative connotation, especially when it is a new position in the practice. Consider using the title of Office Administrator or Office Coordinator. Be aware of the high probability that it will upset some of your team members, especially those who are threatened by change. Treat them with respect and avoid keeping them in the dark. Let them know what is happening and why, and make sure you are empowering this person in their new position. Emphasize to the entire team that you are still calling the shots and ultimately are the determining factor in all decisions. This individual must have the ability to balance friendship/team relationships while leading and managing the practice.

Working with your new leaders and the team requires patience and tolerance as you start to delegate. Change does not happen in 24 hours. Create achievable short-term goals in bite size pieces and celebrate as you accomplish each of these goals. Finish one project before you go on to another.

Establish communicating methods to enable evaluation of your current status, progress to-date and as well your ultimate goal. Promote honest input and suggestions, encourage team members to come to the table with a solution rather than a problem. Partner yourself with an individual or individuals with the appropriate mix of experience and skills in place to help you guide the practice to the next level of excellence. Develop capable team members and empower them to make decisions. Delegate responsibility thereby allowing you to focus your time and attention to your “passengers” on their flight to a beautiful smile.

## About the Author



With more than 35 years of experience, Debbie Best evaluates staffing needs and systems to develop a strategic plan for practice productivity. She designs customized schedules, personalized job descriptions, and a team member handbook to fit each practice’s needs.