



ORTHO2

# Do You Need an Office Manager?

This is a big question facing many orthodontists today and, unfortunately, there is no easy “yes” or “no” for anyone.

Your need for an office manager is dependent on many criteria, and the manager’s role in the practice varies among offices. Some practice management firms advocate “self management” and are totally against having a person on the staff with the title “Office Manager” or “Office Administrator.” I do not agree with this because every practice is unique, and let’s face reality, not every office is staffed with a group of self-motivated people. If you eliminate management in this situation, chaos results.

I agree with having an appointed office manager, although I have consulted with offices that were running beautifully without one. These offices were either very small or staffed with a group of self-motivated people who practice excellent teamwork.

If you are unsure about whether or not to appoint an office manager, there are several questions you should consider:

1. Do you feel a need for someone to help you with the administrative aspects of your practice?
2. Are you experiencing stress due to lack of staff motivation?
3. Is there a lack of organization in your practice?
4. Does the teamwork need improvement?
5. Do you feel the need to check up on your staff to make sure their duties are complete?
6. Are you troubled by office conflicts?
7. Do you feel there is a lack of communication between you and your staff?
8. Do you have cliques in your office?
9. Do you feel stress due to lack of office policies being carried through?
10. Do you ever feel like it’s you against the staff?
11. Do you want a person to help you lead your team?
12. Are you a multi-doctor practice?

by **Charlene White**

If the answer to most of these questions is YES, it indicates a need for an office manager in your practice.

Many of my clients have experienced a tremendous decrease in their stress and an increase in their professional enjoyment after appointing a qualified person to help them lead their team.

## The Role of an Office Manager

This is an area that I know many doctors are uncertain about because many of the managers I meet are in the role of “sort-of office manager.” This type of situation creates frustration for the doctor, the manager, and the staff. The office management needs the title and the authority to be effective, and only the doctor can make that a reality. Let’s look at some of the situations that create the “sort-of office manager” role:

1. If something goes wrong, the doctor gets frightened and takes some authority away from the “sort-of office manager.” On the other hand, if the doctor is feeling stressed, it becomes convenient to redelegate to this person. The doctor/office manager relationship must be cultivated over a period of time. The doctor must place his/her trust and confidence in the manager to prevent diminished morale.
2. Many doctors are unwilling to make a commitment by announcing a staff member’s appointment to the position of office manager. Often one person has taken the responsibilities of office manager on their shoulders to fulfill the doctor’s requests and to meet the leadership needs of the practice. However, the doctor may be reluctant to announce the appointment, fearing the other staff members will object. This creates a frustrating situation for all,

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especially for the person in the “sort-of office manager” role. The doctor must make a decision based on what is best for the practice.

3. Many doctors have been reluctant to give their “sort-of office manager” authority because the person has risen up through the ranks in the practice but does not possess the necessary skills to manage people. There is a tremendous need for advanced management training for the person who is going to be leading the orthodontic staff of the future. Continuing management education and self-study are essential to developing the management and people skills necessary.

To prevent the “sort-of office manager” role from holding back your practice, I recommend the following:

- Find the right person that you respect and trust.
- Outline this person’s job description and distribute it to the team.
- Make an announcement to the staff regarding the appointment and the manager’s role in the practice.
- Make a commitment to support this person 100%. For example, if a staff member comes to you (the doctor) and complains about the manager or asks you a question concerning a department that is a responsibility of the manager, you should say, “Sally, I understand what you are saying, but you will have to talk with Jean about that.”

Many managers undermine their own authority by being message carriers for the doctor. For example: “Dr. Smith wants all of you to clean the sinks better starting Monday.” This is not the role of a good office manager. An effective manager would say, “We all have a responsibility to keep our office clean for our patients. The sinks were not cleaned yesterday. Let’s talk about what is preventing this job from getting done.”

The staff needs to be fully aware of the responsibilities of the office manager. The following is a sample job description of an office manager. Each practice must design their own to meet the needs of their office.

### Office Manager Job Description

- Responsible for all personnel issues in the practice, including the following:
  - Recruiting, hiring, and training of all staff (clinical and administrative)
  - Management of all staff compensation (insurance, retirement, etc.)
  - Daily staff management
  - Annual performance and salary reviews of all staff
  - Any necessary probation or dismissal action against staff
- Coordinate all staff meetings (daily morning huddles,

weekly staff meetings, and retreats).

- Coordinate any staff functions (staff picnics, holiday parties, etc.).
- Act as a liaison for the staff on issues that demand the doctor’s attention.
- Maintain all personnel records.
- Maintain the annual staff empowerment calendar and make sure that all birthdays, anniversary dates, etc., are recognized.
- Act as a liaison between the financial coordinator and the accountant to verify that the financial systems are working properly.
- Frequently review the scheduling coordinator’s template to be sure that the appointments being scheduled adhere to office requirements.
- Oversee staff schedules.
- Stay abreast of new developments in training (home study courses, seminars, etc.) that may be of value to the staff and doctor(s).
- Supervise all marketing strategies of the practice.
- Be properly trained to act in the role of New Patient Coordinator, Appointment Coordinator, or Financial Coordinator when necessary.
- Handle any customer service concerns of parents or patients.
- Must constantly look for ways to streamline office systems.
- Responsible for keeping the practice’s policy and procedure manual updated and making sure these policies are followed.
- Ensure that the office facilities are well maintained.
- Oversee any major projects for the practice (computer purchases, facility renovation, etc.).

### Qualities of an Effective Office Manager

The following qualities are highly desirable in this position:

- Energetic person who works the hours needed to get the job done.
- Understands the big picture of the practice and shares the same values of the doctor.
- Honest and direct with their communication. Can tell people the truth in a caring yet direct way.
- Unwavering support of the office manual protocol.
- Keeps confidence of the doctor and staff. The staff learns they can trust the manager.
- Sees both sides and works to find win/win solutions.
- Does not show favoritism.
- Motivates and empowers the staff with their actions and communication.
- Frequently solicits feedback from the staff regarding their thoughts and feelings.
- Develops healthy communication lines with the doctor and

# About the Author

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Charlene White is a management expert and dynamic speaker. Her flexible, realistic approach takes a “facilitator’s” path to success, emphasizing how each listener can adapt Charlene’s methods to his or her own personal style.

- is not afraid to be assertive when needed.
- Viewed by the staff as a hard worker and totally committed to the purpose of the practice.
- Professional in their look and their actions.
- Proactively takes action and gets things done.
- Knows how to have fun with the staff and still remain effective as a manager.
- Creates a zero fear level. The staff members feel safe in discussing their feelings with the manager.

## Evaluation of the Office Manager

Once every 6–12 months, the staff should have an opportunity to evaluate the manager. Confidential forms should be given to the staff. The forms should be returned to the doctor to review. The doctor should discuss the positives and any constructive feedback gleaned from the evaluations with the manager. A synopsis of the evaluations from the leader is more effective than reading them individually. A good manager desires feedback on how they can better serve the team.

## Percentage Spent on Staff Salaries

I have reported in many previous publications that the total of staff salaries (not including lab technicians) range from 18% to 23% with the average being 20%. This is the total amount of the W-2 forms. If a doctor decides to add an office manager who does not also function as Financial Coordinator, New Patient Coordinator, or Appointment Coordinator, it will increase the percentage by approximately 2%.

Many doctors tell me that the additional investment in the budget is well worth it because of their reduced stress level. They gladly give up the extra percentage. An effective office manger also helps keep the production moving up therefore balancing out the addition to the salary percentage. ☺