

First Things First: Tips For A New Practice Owner

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Congratulations! You are now the proud owner of an orthodontic practice and your future looks so bright you need sunglasses! At last you can be the decision maker, the captain of your ship of fate. You can start putting into practice all your good ideas from your (very expensive) extensive education, and begin fulfilling your long-delayed dreams, and begin paying off your student loans!

Ah, if only it were that easy! While you have spent countless hours immersed in the science of orthodontics, most likely you can count on one hand the number of hours devoted to the business of orthodontics. Your degrees have given you the right to practice orthodontics; they do not insure your practice will be successful.

When (typical) new orthodontists walk into their own practice for the first time, the only tools in the tool kit are their orthodontic skill/degree and personality. If they have purchased an existing practice, they step into an already functioning machine wherein the staff has more orthodontic experience than the new doctor, yet the doctor is in charge and expected to lead.



Several Leadership Problems New Doctors Face

- They are ignorant of (do not know) business practices.
- They are ignorant of their ignorance (they may know they do not know, but not how much they do not know).
- They think they *should* know and are fearful of anyone finding out they do not know.

The most successful doctors know that they do not know enough and welcome the opportunity to learn *before* they begin making demands for change. Those who try to hide or deny their ignorance end up looking like the naked emperor parading through town believing he was wearing an elegant robe; or, worse than that, they can come across as arrogant, unappreciative and uncaring.

The most important fact to grasp about successful orthodontic practices is that the source of success is the ability of the doctor and staff to be in relationship - with each other, with the patients and with the community as a whole. A harmonious relationship! Not the degrees on the office wall, not the video games or the coffee urn in the reception area, not the game of the month or theme of the month decorations – a relationship! The games, the coffee and the decorations are things used to support and nurture relationships. Without relationship as the foundation, what you do to market the practice ends up being gimmicky and slick.

So, what is the new doctor to do? The following are a few essential steps that set the new doctor on the right path. Please understand that this “journey of 1000 steps” begins here.

As a general approach to introducing yourself to the practice, be empathetic to what the staff members are experiencing. Some, maybe many, may not be too excited to see the change in practice ownership. There will be staff members who had worked with the previous doctor for many years and established a long term relationship

with him or her. They may be sad about the change, nervous about what the change will bring, uncertain about their job security, uneasy about being “disloyal” if they accept you too readily, along with a host of other emotions that staff go through in the transition process.

Wait at least six months before introducing changes or potential changes. No one wants to hear your good ideas until you are familiar with theirs. One of my basic operating principles is: “If you want to be heard, listen first.” Do not make any changes in the practice, including orthodontic treatment techniques, brackets, etc., until you fully understand how things are already working. In addition, if and when you do want to make changes, do not just tell them what changes you are instituting, but rather involve them in a discussion for change. Remember, the practice was doing well enough to entice you to take on enough debt to make your education loans look like pocket change! Find out and acknowledge all the things the previous doctor and the current staff did right; do not just look for the actions they took, but also look for patterns of behavior and the way doctor and staff relate to each other and to the patients. Look for what you can build on before you start tearing down!

First Week on the Job

Spend a day observing each department in the office and finding out exactly what the staff does: reception, scheduling coordinator, financial secretary, lab, and treatment coordinator. Find out from the front lines what they do and why, what they think is working and why; what they think could be improved and how it could be done. Make no promises to change anything - just listen, take notes, and let them know you have heard them. For added impact, at the end of shadowing each department, have the staff test you on what you learned.

Take the staff out to lunch in pairs and have it be a “get to know you” lunch...find out about their families, hobbies, talents, anything special they want you to know about the practice and how to improve their jobs. Do not make it an interview or interrogation, but rather a social luncheon wherein you exchange information and start to create a relationship with them. For added benefit, make the pair of staff to be one person from the clinical staff and one person from the administrative staff; the added benefit being they may learn something new about each other as well.

First Month on the Job

Host a “get to know the doctor” evening (5pm-8pm on two different days) for patients and referring doctors, complete with refreshments, with staff acting as co-hosts. Follow the principle of “If you want to be popular, be interested. If you want to spend a lot of time alone, be interesting.” In other words, find out about them rather than telling them about you.

First Staff Meeting

Let the staff know your first job is to learn...about them, about the workings of the practice, and about the ways things get done in the practice. Let them know that your questions are designed to educate you and not to intimidate or test them.

Tell them what you admire most about the staff and what motivated you to buy this particular practice. Let them know that for the first six months or so things will be “business as usual” and that, should you decide to make changes, you will involve them directly in the process before any changes take place.

First Planning Meeting

Prepare an agenda that is distributed to all staff at least a week in advance and invite them to make suggestions as to what should be addressed in the meeting. Have the main focus of the meeting be establishing

the core values of the practice. A simple and engaging exercise to accomplish this is to have a flip chart available and have everyone participate in saying what their core values are for work and the practice. You will probably come up with a list of 30 or more core values like *fun, excellence, relationship, profitability, communication*, etc. When the list is complete, as a group, select five to ten values that everyone can align with by asking the question, “Which of these core values, when followed, would create the work environment that you can be proud of and that patients would be attracted to?”

Have each staff member make up a mission statement using the core values. For example: “We are committed to establishing **relationships** that **nurture** all who enter our doors. We pledge to strive for **excellence** in all our endeavors in a **fun** atmosphere. We cherish the opportunity to **make a difference** in the quality of life for our patients, each other, and the community as a whole.” At the next meeting, have everyone read the mission statements they have crafted, then either vote on the one to be used, or select a committee of two or three staff members who will use the submissions to craft a mission statement. When the selection process is complete, include the new mission statement on your website, in your office, and on your printed materials. Read the mission statement at the start of the morning huddles and staff meetings as a reminder of what everyone is there to do.

While all these steps are important, the most salient point to take to heart is that a relationship will be the foundation of your success. Remember, this is a journey of a thousand steps, and these are just the first few to take Oh, and one other thing, remember to get those sunglasses!

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