

MANAGEMENT & MARKETING

The following is an excerpt from Dr. Gorczyca's new book, *One Team, One Score: Leadership and Teamwork for a Successful Dental Practice* (available on Amazon).

Part One: Leadership

Chapter 7: Action

The older I get the less I listen to what people say and the more I look at what they do.

—Andrew Carnegie

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As a leader, your responsiveness to making decisions, assigning tasks, and working out details determines your success. A tone of urgency is needed in order to take action. As leader, hold people accountable for what they are assigned to do. Let everyone know that there is no time to waste.

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Plan Your Year

We may be very busy, we may be very efficient, but we will also be truly effective only when we begin with the end in mind.

—Stephen R. Covey

As leader, you may be asking yourself, “Where do I start?” Begin with an annual advance-planning meeting for your team. The yearly advance (not retreat!) puts your big-picture business plan front and center for everyone to see. In this way, you are creating the game plan first, prior to implementation.

Define what you are trying to accomplish. Get organized, bringing everyone on board. Plan your year. You can modify your plans as you go, but the general outline, built during your advance, guides you in the desired direction.

To aid in each team member's engagement for the annual advance, distribute a questionnaire ahead of time. Here is a sample of what you could include:

Four Annual Advance Questions

- 1. What do you think were our team's greatest accomplishments of the past year?*
- 2. What was your finest personal achievement during the past year?*

3. What will you do differently in the coming year to make the practice more successful?

4. What are your expectations for our annual advance and the coming year?

The annual advance prepares a big-picture view of the office business plan. Here is a sample outline of an annual advance agenda.

Annual Advance Agenda

Continental breakfast	9 a.m.
Doctor	9:30 a.m.
Introduction	
Vision, mission, core values, tagline	
Questionnaire results	10 a.m.
SWOT analysis (Strengths, Weaknesses, Opportunities, Threats)	
Treatment Coordinator	10:30 a.m.
Year-End Report	
Average exams/month	
Average starts/month	
Same-day starts/month	
Goals for the coming year	
Public-Relations Coordinator	11 a.m.
Year-End Report	
Total number of referrals	
Number of referrals from doctors, breakdown	
External marketing referrals and analysis	
Internal marketing referrals	
Marketing calendar for the coming year	
Team	11:30 a.m.
Brainstorming	
Lunch	12 noon
Financial Coordinator	1 p.m.
Year-End Report	
Accounts receivable: responsible parties	
Accounts receivable: insurance	
Accounts payable	
Records Coordinator	1:30 p.m.
Customer-service update, reviews	
Schedule update for the next week, month, 90 days, year	
Doctor	2 p.m.

Human resources and handbook updates	
Courses and special events for the coming year	
Goals for the coming year	
Team	3 p.m.
Brainstorming	
Doctor	3:30 p.m.
Achievement awards	
Meeting adjourned	4 p.m.

The SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) serves as a chance to gain necessary perspectives about the office, your success, plans, and what to work on together. The SWOT analysis lays groundwork for brainstorming and action plans for the coming year.

Plan Your Day

Either you run the day or the day runs you.

—Jim Rohn

Ask yourself, “What is the most important thing that I need to accomplish today?” Write it down. Then make sure to accomplish that *one* thing. Watch your minutes and day, and the week will take care of itself. The month will flow. The year will follow. Focus on the now, and what you can achieve today, and you will always be rewarded.

Daily accountability is reflected on the end-of-day sheet. What was today’s production? What were today’s collections? Did we have new-patient exams? Is there cash to be delivered to the bank? Did the end-of-day sheet deposit match the bank deposit the next morning?

Verification of the end-of-day sheet is a vital responsibility of the business owner. This is not micromanagement. It is attention to details and systems that will make your office successful.

Plan Your Week

Nothing, and no one, can disrupt your intention.

—Thomas D. Zweifel

It is at the weekly team meeting that you clarify the most important focus of the coming week. In our office, everyone speaks and remains engaged. One team member reports the appointment openings remaining for the next week. This gives you a chance to fill these slots. Review lead measures of what can still be done, not lag measures of past reports from previous weeks, about which you can do nothing.

If extra space is needed for new-patient starts, you can add doctor time to the weekly schedule. I often remind my team, “You are in total control. There is no need to be stressed. You are in charge of our schedule. If something needs to be altered, we will change it.” The key is to know and be clear about your own office priorities.

Maintaining laser focus means discarding “junk experiences.” Time wasters may include an unwanted company lunch. Cancel it. That time could be better used, if only to relax or make patient or referring-doctor calls. Always emphasize practice-building activities.

I like to wrap up my week with the team meeting on the last day. We hold our team meetings from 12 noon to 1 p.m. on Thursdays. No food, just focus, discussion, and engagement. Once the meeting is over, we break for lunch until 2:30 p.m. We finish our day at 6 p.m., ready for the week ahead, fresh and prepared.

Start your week with momentum and 10 phone calls: 10 new patients whom you want to start, or 10 new dentists with whom you want to work, or 10 businesses with whom you would like to partner. Make important payments on Mondays. If you have a loan, keep a goal of making a payment every Monday until the loan is paid off. It’s only the first hour of your week, and look how much you have already accomplished!

Train everyone to “own” their schedule, “own” their column of patients, “own” their week, “own” their team wins, and “own” their future. Start your week having something special to anticipate. Make it a great week! You’ve got this!

I keep my monthly year calendar on my desk. I also keep the calendar from the past year to remind myself what really worked well in the past. Look at the months and year ahead. Does your

office have any special events planned? Are there any days off or meetings to be attended? Will your public-relations director be making deliveries? Does the doctor have lunches with colleagues or continuing-education events? Whatever you do as a team, even if it is as simple as sending Christmas cards, can and should be programmed at the weekly team meeting.

Cash Flow

He who does not honor the cent is not worth the dollar.

—Swiss proverb

It’s the last day of the month. Your last patient has left. You are prepared to start the new month. You may have a target balance, which you would like to maintain to cover your next rent or mortgage payment and payroll, including the doctor’s salary. Do you have a surplus, or do you have a few bills left to pay? If you have a few bills, assuming that you worked as well as you could, you need to reduce costs.

Share the end-of-the-month situation with the team. I assume that all workers want raises. To have sufficient funds, you need to increase collections and reduce expenses. Cash flow is not production. ***Dentists can work themselves to death with production and still have poor cash flow if collections and expenses are not under control.*** Collections need to be maximized. Expenses need to be as low as possible.

When leaders feel that “menial details” like cash flow are beneath them, that is when systems start to break down. Every metric reflects strategic intent. All numbers are relevant to the business owner. At the heart of profitability are the details.

Attention to cash flow is essential for proper functioning of dental societies. Not reading contracts carefully, ignoring costs, or overspending the budget are examples of irresponsible actions that reflect poorly on all board members. Remember that the main responsibility of the board, beyond running the organization, is financial oversight.

Make Money Matters Clear

There's no such thing as a free lunch.

—Milton Friedman

With open-book management, all money matters are shared with the entire office. Whether collections are up or down, the number is the result of the team effort. Whether it's a raise year or not is reflected by collections and should be no surprise to anyone. Open-book management takes financial pressure off the owner/leader while building the trust and engagement of the staff. The team's success is in their own hands. They've earned it themselves. They know that the pay, bonuses, and raises are fair.

Take time to talk about money with your team. This may not be easy for the younger dentists, but it is a necessary skill that will come more naturally with practice and maturity. Explain the 401(k) retirement plan. Explain paid vacations and holidays. Order a new team uniform. These are the benefits not every job offers. Let the interviewee and team members know that \$17.25 at Amazon or \$22 at McDonald's does not equal \$17.25 working full-time in a dental office with benefits.

By understanding and appreciating money matters, employees become more secure in their jobs. Let the team know that you don't reduce pay or hours to cut costs. The corresponding responsibility is that *as a team, together, you watch expenditures and price check to keep the office profitable.*

Before you call in your payroll hours, have each team member review their hours for accuracy, and initial that their time sheet is correct. This could save you time and money in the future by avoiding a payroll audit. Overtime is always paid when due and payroll is always accurate. Go over payroll dates with your team as explained in the team handbook. Define how weekend and holiday pay dates will be handled.

Our team handbook lists pay dates of the 5th and the 20th. These dates apply to the pay time periods 1st-15th and 15th-31st. Payroll may come before the 5th and the 20th of each month, but it will never come after that date.

Winning for the team is often equated with financial rewards. There are two ways to grow the surplus: increase production/collections or reduce expenses. Remember:

Profit = Collections – Expenses

Profit is your team's salary and the doctor's salary. Profit is the reward for hard work and careful cash management. Your profit is your reward for working well together. Paradoxically, "people-over-profits" workplace culture most often increases the bottom line. With the right people, and the right spirit, monies are not wasted and the profits follow.

Notice that I am not listing production here. Production numbers might give the practice owner and team an unrealistic picture of financial success. Although production numbers can be a harbinger of future revenues, *collections are what really matter.* Collections are cash flow, the fuel of your practice engine. Stated another way, production without collection is charity work.

Therefore, one ratio to concentrate on is the collections-to-production ratio. You want this as close to 100% as possible, at least in the high 90s. Watch this number as an indicator of your control of discounting and attention to accounts receivable from patients and insurance carriers.

No office can afford to be doing dental treatment for free. You pay for the supplies, labor, and overhead costs. Take care to get a substantial down payment before starting treatment. Always have a signed financial contract and an accepted treatment plan.

Payment contracts augment informed consent for the patient as well. No dentist wants to be perceived as providing care that the patient did not want. Take time to explain the treatment plan and the financial arrangements. Always start treatment after having medical clearance, treatment consent, and patient financial contracts signed by both the patient and the doctor.

Controlled Spending

A penny saved is a penny earned.

—Benjamin Franklin

Push back against quick decisions or consensus on a bad idea. This is especially true with overspending or not reading contracts. If you are leading a nonprofit dental board, make sure everyone on the board has a copy of the contract under consideration and call for full review and discussion before anyone makes the decision to sign. ***Always make sure that your contract is not open-ended.*** A closed contract gives the final total cost and does not continue charging by the hour ad infinitum. Once you sign a contract, it will be difficult, if not impossible, to reverse it. If you have questions about a contract, have your attorney review it before signing.

Financial pushback in a group setting requires a careful balance of using political influence and depending on self-reliance. Don't avoid discussion and just hope for the best. Wishful thinking can only lead to disaster. I remember when our building tenants' association wanted to sue our landlord. Emotions got the best of the group. I had to walk away from what appeared to be a dangerous, open-ended financial precipice. I hired my own attorney and renegotiated my lease in what turned out to be an excellent money-saving decision. If you need help with lease renegotiation, contact George Vaill at www.dentalleasenegotiations.com. Initiate talks two years ahead of the lease-renewal due date.

The best thing I ever did to control spending in my office was to get my own mail and review my own invoices, which can be organized by due date. This will give you a clear understanding of cash flow on a daily basis. Bills come with plenty of mistakes. Just this week I received an invoice for toothbrushes costing \$300 with a shipping charge of \$203! I doubted that was correct. I called the company, and the cost was reduced to \$20.30! It will save you thousands of dollars in accounts payable to check for accuracy.

Share costs with your team. Let them know the cost of equipment, ADA dues, and Invisalign.* ***Once your team understands your expenses, costs will be contained and there will be no urge for unnecessary spending.*** Once the inventory coordinator documents supply costs, she can start comparison shopping to find the best price possible. A suction tip is a suction tip! They all work. Cost is the overriding consideration.

The second-best thing I ever did in my office to control spending was to get my inventory coordinator her own credit card with a limit of \$1,500. This facilitates acquisition of items bought locally, such as distilled water for the sterilizer, or similar inventory. It also provides an ongoing appreciation of how quickly costs add up. With this knowledge, the inventory coordinator can price check, just as she would with her own money.

A few of my colleagues expanded to second locations in the roaring 2000s. Just a few years later, during the recession of 2008, they ended up closing their second locations after incurring financial losses. A second office can definitely be a huge and unnecessary expense.

Case Study: The Executive Director

The board was planning a national meeting. One board member had volunteered to run the meeting and chair the planning committee. Once appointed, he announced, "I need an executive director." I thought, "Shoot, if I had known that I could hire an executive director, I would have volunteered!"

The board voted that the executive director would be paid \$10,000 to run the three-day meeting. This was a steep fee, considering that hotels have event planners as part of the reservation package to help organize functions at a lower cost. Nonetheless, the \$10,000 fee was voted on and passed by the board. A few months later, it was announced at a board meeting that the fee would now be \$16,000. Board members squirmed. One asked, "Could I see the contract?"

It was an open-ended contract that charged by the hour with no limit. Now the executive director had hired his own assistant and was charging for her services as well!

When all was done, the group paid the executive director \$30,000 for a three-day meeting! The final payment was three times the original estimate, and there was nothing that could be done about it.

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Solution: *Read contract proposals carefully.*
Never sign an open-ended contract. Don't rush into decisions that have not been thoroughly examined and discussed. Have a very low threshold for consulting your attorney on contracts.

Ten Acts of Leadership

Leaders don't run away from problems. Leaders run toward them. The sooner you solve problems, the faster you will achieve success.

Here are 10 leadership actions to embrace.

1. Lean in to Discomfort

You can choose courage or you can choose comfort, but you can't have both.

—Brené Brown

Most of us don't like to confront others, especially when they are making our lives difficult. As leader, it is your job to initiate corrective action. Sometimes dental leaders are just too darn nice. Sometimes we're afraid of an uncomfortable conversation to highlight an unwanted behavior. Raise the standards for yourself, your team, and our profession by undertaking necessary discussions.

Do not fear rejection. No matter what you do, there will be someone to criticize and reject you. Swallow your fear and press for a solution. Sometimes it will work. Sometimes it will not. It is your job as leader to at least give it a try.

2. Care that All Is Done Right

Your team might be waiting for you to dive in and get more involved before they put in the extra effort. "That's not my job" should never be stated by anyone on your team, least of all by the leader. Owners of dental practices are usually the last out the door at night and perhaps the first to arrive in the morning. Never demand anything of your team that you are not willing to do yourself. Lead by example.

Take responsibility for assigning the right person to the right job. Proper delegation is in the owner's wheelhouse. Assign important tasks to the best person for each and every task at hand.

3. Make Co-Elevation Your Standard

You will never know or be able to control what goes on in another person's mind. Perhaps they have been bullied or discriminated against. Once you become leader, work toward cooperation, unity, and a better future.

Some team members may quit under your leadership, blaming you or the office for their lack of commitment. Let them leave. That's their choice. Don't take it personally. They may not have the same standards or work ethic that you do. They did the group a favor by letting you know that they don't want to be on your team.

Don't get caught up in how things were or the antileadership statement, "We've always done it this way." You are the leader now. This is your time to lead. Don't let anything or anyone hold you back from being fantastic. Encouragement is the greatest motivator for both you and your team. Be a force for good. Begin a movement of co-elevation.

4. Make Decisions Quickly

Every leader has the courage to make decisions. No decision is usually the worst decision.

—Orrin Woodward

Time is money. Don't waste your time or your money. You don't want to discuss things twice. Discuss things once, make a decision, and get on with it.

5. Be Informed

Whatever is going on in your organization, you, as the leader, should know about it. Ignorance is not an excuse for a leader. If you don't know something, ask. Be vigilant. Take time to confirm. Do not assume anything. Start with an open-ended question, such as, "How is it going?" Then listen. I have found that saying, "What can I do to help you?" is demeaning to some people. In their book *Work with Me*, authors Barbara Annis and John Gray state that unsolicited help indicates to a man that he is not trusted or capable of accomplishing the job on his own. It is better to say, "Let's work together to improve this situation."

It didn't take me long to realize that my staff is full of great ideas. Your own team could be the best consultant that you ever had. Get them talking. Your own office sees things you don't see. They know things you don't know. Patients open up to team members and give suggestions for improvements. Be each team member's biggest listener and cheerleader.

6. Be Involved

A leader needs to be accessible. This is why, when I designed my orthodontic office, I placed my personal office right in the center. My door is always open, and I can see everything going on in the practice, so that I can be as involved as possible.

A team will appreciate seeing the owner working hard. This will build confidence in leadership ability. The dentist should never be too busy to make sure that the most important jobs are done. If you feel that you are too busy for leadership, cut activities to save time. Whatever needs to be accomplished, you are there to lead it, implement it, organize it, or, when necessary, do it.

7. Communicate Frequently

Communication is the real work of leadership.

—Nitin Nohria

Silence isn't golden. It's deadly. Howard Far-ran, founder of Dentaltown and Orthotown, in his podcast, "Dentistry Uncensored," often states that he can tell a successful dental office the moment he walks in because people are talking and laughing.

Humor + A Smile = Collaboration

Keep the lines of communication open: leader to team, team member to team member, team member to leader. Ease of communication is the hallmark of great collaboration, teamwork, and leadership.

Stay current with your team. As your team members communicate on each new situation, listen so that you are well-informed. You cannot afford to be out of the loop. Ask daily, "Is there anything new?"

The greatest strength of a leader is the ability to listen. Listen to suggestions at team meetings and let team members talk without cutting them off. Consider every proposal. Seek first to understand, then to be understood.

8. Praise Publicly

Praise in public; criticize in private.

—Vince Lombardi

Never criticize a team member in public. This is perhaps the most important rule of leadership. People are extremely sensitive. When necessary, ask, "May I speak to you for a moment in my office?" Take a deep breath. Say, "Next time, would you be able to do it this way?"

Your team members have pride in themselves and their work. They try their best. It is your responsibility as a leader to coach them and make them successful. A display of public negativity may lead to a loss of dignity for the individual and respect for the leader. It might even result in separation of a valued team member. Do the opposite. Praise publicly.

9. Be Fair

People in your organization want to be treated fairly and with compassion. It's not a lot to ask.

—Joan Garry

Some people are higher performers than others. Some may be more likeable. But as leader, you must treat everyone on your team equally, with the same respect. **Lack of fairness leads to resentment and loss of morale.** This is especially true on teams of volunteer dental organizations.

You want each person to feel welcomed and great about their service to the organization. This is another reason why the policies and procedures, team handbook, and bylaws are so important. Rules of your organization need to be followed by everyone equally. Fairness sets the tone of your culture as one of inclusivity and belonging.

10. Never Give Up

I believe in running a company for the shareholders that are going to stay, rather than ones who are going to leave.

—Warren Buffett

It will be hard, if not impossible, to ever find anyone as dedicated to your dental practice as you, the owner. If you are president of your organization, others may quit, but you cannot. Accept this reality and you will never be disappointed. As the leader, you will be facing difficult challenges. Resolution of challenges is the job of a leader. That leader is you.

You have worked hard to buy, run, or start a dental practice. Be grateful to have your practice, and enjoy its benefits. You strived and served your society to rise in the ranks. Whatever you are experiencing as leader, there is no time for “Why me?” thinking. You have total freedom and control over how you react to every situation. Choose to be brave, smart, strong, and effective.

The Exceptional Leader

*Whatever you can do or dream you can do. . . .
Begin it. Boldness has genius, power, and magic
in it. Begin it now.*

—Johann Wolfgang von Goethe

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Exceptional leaders look in the mirror knowing, “If it is to be, it’s up to me.” These leaders look at problems as opportunities. They are not discouraged by obstacles. They think that the leadership challenges are fun.

Every leader can get better. Choose the path of lifelong learning. Look for mentors, role models, and coaches. Read. Just by reading this book you have improved. Listen to leadership podcasts on YouTube.** Never stop learning.

Take ownership of your leadership position. You’ve worked hard to get there. You’re prepared. You’re confident. You can handle any situation. Take pride in yourself and your accomplishments.

As leaders, we must never waiver from our obligation to the mission and to the group we lead. In the words of legendary leader Alan Mulally: “Love’m up!” The exceptional leader looks at challenges, solves them, and continues to take the best actions to achieve success. She carries on with strategic intent, sticking with the core values of the organization. She never gives up.

The concept of Constant and Never-Ending Improvement (CANI) gets me out of bed in the morning and has inspired me to write this book for you. It motivates me to work with exceptional coaches and follow exceptional leaders. I have probably made more leadership mistakes than most people, but I’ve learned from them. The basic task of leadership is to increase the quality of life for all stakeholders. Choose this path with joy, and live in abundance. ■