Overcome your No. 1 fear: delegation

By Sally McKenzie, CMP

There is an interesting paradox that occurs in dental practices across the country. On the one hand, you have the doctor in the fully staffed office who is wearing the floor boards thin day-after-day by running here and racing there. The doctor leaves night after night totally exhausted, overworked and stressed out. She (or he) is working and working and working, but just can’t seem to ever get ahead. Talk to the doctor and you’ll learn that there’s just so much to do, it’s impossible to fit it all into an 8-hour or usually 10-hour day. Talk to the staff and it’s clear that the doctor insists on doing virtually everything herself—from taking medical histories to drafting patient documents. You see, you’re the “go-to” guy or gal because you’re the point person, and handing over responsibility for certain tasks is the impossible dream because the dentist insists he must control all aspects of it. If so, you are in good company.

While we may well have built the practice from the ground up and may feel that he or she truly does “understand,” it is a very difficult struggle, but well accepted that power and control have to be shared. In other words, you cannot do it all. So how do you bring yourself to relinquish a few of those tightly held responsibilities?

First, you have to be ready. Take a close look at what you really want out of your practice. Are you ready to be stressed out, maxed out, and feeling as though you are never going to get ahead, you’ve probably reached #1. Next point where you’re going to be ready to make some changes. Next, accept the fact that the process of relinquishing control will, at times, be a very difficult struggle, but well worth the angst in the long run.

The fact is that when it is handled correctly, delegation actually can be a great time control because it is about directing the players on your team, identifying the desired outcomes, and creating systems of accountability to realign them to accommodate. Delegating duties doesn’t mean abdicating authority. Rather, it’s a means of effectively maximizing all that you and your team have to offer. And it begins with a series of carefully planned steps.

Step #1 Identify which duties to give away and which responsibilities to keep. I suggest you conduct your own time-motion study. Carry a notepad with you for three to five days and write down everything you do relating to your practice. Start reviewing patient records, talking to patients, directing staff, calling in prescriptions, completing forms, evaluating errors on your assistant’ chart, putting out the lights, cleaning out the refrigerator, changing the light bulbs, etc.

Step #2 After you’ve gathered your data, assess how you are spending your time. Is your day primarily consumed with activities that are focused on growing your practice—specifically diagnosing and treating patients? Or are you engaged in activities that repeatedly interrupt your diagnostic mission of delivering care? Is your list full of items that only the doctor can do? Or do you have a multitude of duties that the staff, whether it’s the assistant, hygienist, scheduling coordinator, business manager, etc. could and should do?

Lastly, are there items on that list that you could handle yourself if you were trained to do so? Are some items that should be outsourced or are the result of lack of technology, inefficient space or broken systems?

Step #3 Give general guidelines as to how they are going to do and how they are going to delegate delivering post-op care. But rather than simply handing over the reins for certain tasks, you have to trust that the person(s) assigned will manage the process to be successful. Remember, not everyone is suited to every task. Some people are going to handle certain delegated responsibilities better than others, based on their personality. For example, delegating the development of a more stringent collections system to a high feeling self member who is fabulous in her patient relations may not work out as you expect because this person is tremendously comfortable dealing with patients but also naturally uncomfortable asking them for money.

Step #5 Communicate your expectations. Transfering over responsibility of certain duties is ensuring that employees know exactly what it is you want them to do and how you expect them to do it. Perhaps no one has been able to meet your standards because no one really knows what or how it is that you want something done. What do you want the outcome to be when you hand over a specific responsibility? For example, if you are going to delegate delivering post-op care, it makes sense that written materials will be given to patients. Determine who will do this, the training and the budget to get it done right and to make the decisions that need to be made. Be available and encourage questions, but don’t hover. Yes, we know you’re reluctant to stop micro-managing. But if employees are going to have a chance at effectively carrying out their responsibilities, you have to step out of the way.

Step #8 Do check in regularly with those you’ve delegated a new responsibility to. Remember, they won’t do it as well as you, and they will make mistakes. That’s part of the learning process. Checking in with them on a regular basis will make sure that everyone has the training, time and resources to accomplish tasks according to your expectations. Otherwise employees might feel as though you are going to fail and so is your effort to delegate.

Step #9 Determine how you will measure your employees’ ability to carry out their delegated duties. Everyone who is expected to perform a task must know exactly what goals or targets she or he is aiming to hit, and how their performance will be measured.

Step #10 Celebrate your success as a highly functioning team.

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