

# **PRACTICE MANAGEMENT & COACHING**

**Kathleen O'Donnell, M. A.**

Some of the most rewarding coaching experiences I have ever experienced occurred during the past eleven years as a practice management consultant and business coach for dentists and veterinarians. These are small businessmen and businesswomen who have no golden parachutes, no employment contracts protecting them, no administrative executive team on whom to blame business failures. The “buck” truly does stop here.

In these settings, you work directly with the CEO of these entrepreneurial businesses. You often see immediate implementation and an impact throughout the organization – no bureaucratic mazes to wander through, no complex office politics to muddy the waters. And yet, there are diverse, interesting issues about which you coach your colleague. At times you may be a performance coach, at other times a life coach helping a veterinarian decide if she should change careers. At other times you do classic executive coaching working with a person wrestling with strategic decisions for his dental practice that does \$2 million USD annually. For me, it has been working with the best of both worlds .... that of a small entrepreneur and a corporate CEO.

## **A Blend of Coaching with Consulting**

Coaching dentists and veterinarians typically seems to be most successful when there is a strong base of sound business practices operating in their organizations. When they have experienced profitable months, lower turnover, increased new business, or lowered stress, they have increased interest in classic coaching activities. One is reminded of Abraham Maslow's Hierarchy of Needs. Until business survival and safety are taken care of, these small businessmen and businesswomen have a difficult time dealing with social and self-actualization issues. Practice management consulting gives us skills and tools to address basic business issues and gives us a common language to cut through procrastination. Dr. Maria, a dentist in a wealthy suburb of New York City, repeatedly complained to me in multiple coaching sessions about frustrations she had with her Office Manager's substandard performance. Because I knew she had tools at

her disposal from our practice management consulting that she could use to script a confrontation session with this employee, I asked her what she was getting out of keeping this frustrating situation the same. There had to be some gratification - otherwise, why not use the tools and attempt to change these negative dynamics with this underperforming employee. Dr. Maria acknowledged her procrastination was due to her fear of confrontation. From that point, we were able to talk through worst and best case scenarios, conduct positive visioning exercises, script the confrontation session, and role play several confrontations. Since that positive experience, Dr. Maria feels more confident to take proactive corrective actions with employees when a problem first surfaces rather than postponing.

Another example of the advantageous blend of practice management consulting and coaching is Dr. Lee. I had conducted business consulting for 8 months with his successful veterinary practice in the southeastern United States. Even though coaching was woven throughout this consulting process, we moved to scheduled, routine, separate coaching sessions at this veterinarian's request once he experienced two private coaching sessions focused on a personal situation that had angered him. He and his partner of 10 years, Dr. Ted, who is his younger brother and is also a veterinarian, had begun having communication problems when Dr. Ted started dating their newly hired Business Administrator. Dr. Lee sent me a desperate sounding email, uncharacteristic of his personality style, asking for private telephone time with me.

In those two sessions, I actively listened as Dr. Lee vented about his brother's pattern of enmeshing his personal life into their business. His only solution initially was to leave their partnership and take his portion of the veterinary practice with him. We covered a lot of territory over two sessions as highlighted below:

- We guided him to articulate then explore his feelings of anger and betrayal.
- We reviewed key characteristics (focusing on strengths) of each of their personality styles using the DiSC instrument. Dr. Lee was coached to approach his brother using verbal and nonverbal communication that reflected his brother's personality style versus Dr. Lee's own dominant style.
- We used an appreciative model and identified prior times his brother had contributed positively to the veterinary practice partnership.

- We guided Dr. Lee to be able to distinguish between a mere irritation with his brother's behavior versus a real problem that has a concrete negative effect on Dr. Lee and/or on their dental practice.
- We used an analytical problem solving 6-step process he and his whole staff had learned through our consulting. This included brainstorming alternative solutions which moved Dr. Lee beyond the sole solution he originally had – to leave this partnership and take his portion of the practice with him.
- We practiced “I” messages he had also learned through our consulting so he was comfortable confronting Dr. Ted (“I feel \_\_\_\_\_ when \_\_\_\_\_ because \_\_\_\_\_.”).
- We scripted his planned confrontation and practiced different reactions we anticipated his brother might have.

Armed with all this preparation (Jameson, 2002), Dr. Lee scheduled a lunch meeting (purposefully planned over a meal in a public setting) and confronted his partner. The end result was they broke a 10 year pattern of relating to each other in persecutor-victim-rescuer mode. They reached an equitable solution that permits them to continue their partnership but with new methods for communicating with each other and less emotional ways to solve problems. Dr. Lee kept stating “This stuff really works!” He felt so empowered by our thorough preparation for his confrontation that he requested individual, monthly executive coaching sessions in addition to the on-going practice management consulting. Dr. Ted was so impressed with his brother's more effective approach to problem solving rather than the usual verbal bludgeoning done in the past that he requested individual coaching also. To keep boundaries clear, I referred him and he has regular monthly one-on-one sessions with his own executive coach.

### **Modified 360 Performance Feedback**

You might think 360 performance feedback systems won't work with the CEO's of small businesses like dental and veterinary practices. With some slight modifications, 360's can provide powerful feedback these business owners might never receive. Most companies this size do not have Boards of Directors to whom they are accountable so those types of questions need to be culled. They do have a customer base with whom they have close personal relationships.

Patient or client surveys are often conducted in the dental and veterinary worlds, so it would not be too much of a stretch to engage the customers in this feedback process. Employees of dentists and veterinarians are eager to provide pooled feedback that may positively impact their working environments.

Two partners with whom I had consulted for three years in the northeast US were seeking to enhance their employee annual performance review system. This dental practice employed 35 people who supported the two partner-owners and two additional dentist associates. I discussed the advantages and risks involved in them completing a 360 performance feedback process. I stressed the need to combine coaching with a 360, having personally experienced a 360 with absolutely no follow-up in the 1980's. They were eager to engage in this type of rich feedback process.

I worked with William Bergquist, President of The Professional School of Psychology (PSP) in Sacramento, California, to get his 360 instrument adapted for this small business. I coached the two dentist owners about the announcement to the staff. Their process was a welcomed part of the overall teambuilding connected to the corporate performance review process started 3 months before. Staff members perceived me as a trusted external consultant, since I had worked with this team of people for 3 years. They were quite pleased to know that I would be managing this feedback process. For two weeks I fielded questions via phone and email from the team members, most of which consisted of the need to ensure confidentiality and some fears of retribution. Each of the dentists worked with their Director of Operations to identify the pool of 12 respondents who were asked to complete the feedback surveys on each partner. A few people completed a survey for each of the partners due to their working relationships. One was the Director of Operations who closely worked with both owners. Completed surveys were individually mailed to me. I did preliminary scoring then submitted survey data for final statistical analysis to California.

The results were disturbingly negative about both owner dentists. Subordinates were exceptionally critical, and the partners were brutally negative about each other. Similar to a larger corporate setting when one "boss" is in an isolated category, they were aware of feedback

received from each other. The “peer” group provided the most balanced results. These peer surveys were completed by the two dentist associates and the Director of Operations. Some employees had been with this dental practice for over 20 years and it seemed as though they had “gunny sacked” gripes and grudges for years and dumped out their imaginary sack through this feedback instrument. It was a challenge to organize the data feedback so these two men were not devastated by the overall results.

### **A “Coachable” Instrument**

Fortunately, the survey we used had two unique features: First, it is a coachable performance feedback instrument that allows the coach to go to specific “cases” or situations described in the survey and explore feelings and actions beyond just the statistical results. Second, in addition to self-scoring an instrument, each dentist-owner completed an additional feedback instrument projecting scores they would receive from the overall group of twelve respondents. These two features provided ways to broaden their view and not concentrate solely on the negative aspect of the feedback received. In many cases, although one dentist may have scored himself high while pooled feedback scored him very low, when we looked at his projected results of what he thought others would say, he was exactly in sync with those respondents. That provided interesting opportunities to explore why this man had not yet taken any corrective action for a behavior he obviously already knew he was not perceived as doing well. The projected results in many cases neutralized the overwhelmingly negative respondent feedback.

Using a coachable 360 feedback instrument, a coach can guide her colleague or client using more appreciative coaching techniques. After reviewing specific survey questions with each dentist, I attempted to put an appreciative coaching spin on things by asking questions or making statements such as the following:

- Describe times you *did* function satisfactorily in this setting.
- How did you feel at a time like that?
- Where is the disconnect now?
- How can you re-create that success?
- If you *were* perceived as exceptionally good at \_\_\_\_\_, how would your days be different?

- What are some ways you think you can positively impact this misperception others appear to have about your ability to \_\_\_\_\_?
- What actions will you commit to taking? By when? How?

I spent a total of four hours with each individual dentist, reviewing the summary reports, clarifying their questions, comparing their projections with actual respondent results, discussing their feelings and reactions, reviewing specific coachable survey questions, and ultimately, planning for action. For part of this time, I also spent preparing each man for addressing the other. This was an important part of the process, since they had given each other such critically negative feedback revealed in a separate category. I also coached them about sharing some parts of their results with the entire team at a staff meeting and talked about behaviors they would continue to display and changes they intended to work on. This process was very positively received by the staff members who had feared the owners' reactions. I received emails and phone calls from team members for weeks afterwards stating how moved they had been by the owners' honesty, their vulnerability and willingness to work on personal change for the good of the dental practice. We continue to work on improving the communication between the two partners and have seen some significant changes that provide much hope.

### **Appreciative Coaching**

Appreciative coaching (Bergquist and Mura, 2011) has become a powerful intervention strategy in my work with dentists. For decades, US dentists have had the highest rates of substance abuse and suicide of any profession in the US. One can speculate that this may be due to dentists experiencing low self-esteem, due to their perceived lower status when compared to physicians in the US health care arena. Or it may be attributed to performing procedures that so often inflict pain. Often dentists are treating patients who simply don't want to be there due to fear of pain. Or it has been said that dentistry has been the brunt of jokes for so long that it has tarnished the image of the profession. Or maybe it is the almost debilitating dental school teaching model that dentists survive. No matter what the reasons, appreciative coaching has had amazing transformational benefits on the dentists with whom I coach. Ultimately, this approach also benefits their businesses. I see a shift from spiraling negativity – looking at what is wrong and who is to blame—to analyzing situations when things have gone right and formally

acknowledging people for their contributions to these successes. Once these dentist and veterinarian clients experience appreciative coaching, they begin to try appreciative management techniques with their own employees and typically experience a renewed joy in owning and managing a business.

When a coach works with clients who often possess such a predominantly negative spin on life (as described above), there are ample opportunities for recognizing distinctive strengths and competencies as well as uncovering obscure strengths and competencies. By creating a sanctuary through the coaching sessions, dentists are given a safe time and place to explore, experiment and ultimately learn. (Adams, 1989)

Dr. Jane, a suburban dentist operating outside a moderate size Midwestern city, has owned her own practice for 15 years. Her monthly revenues are above average and she enjoys the stability of long term employees. By all accounts, she would be considered comfortably successful. However, in the past 3 years, more dentists have opened up practices in her area, decreasing her number of new patients. Dr. Jane knows she needs to market herself more in her community. So, in spite of her terror of public speaking, she accepted a keynote speaker role at the local chapter of Rotary Club, an international service organization. During several hours of face-to-face performance coaching sessions, we reviewed the content materials Dr. Jane had researched for her speech.

These early drafts focused too much on dentistry and sounded like an “info-mercial” for her dental practice. Through interviewing techniques I used with her, she realized she could broaden her topics to include general health themes - once we discovered new areas of expertise she had about smoking cessation and pharmacology. By focusing on her strengths outside of dentistry, she was able to feel confident about addressing this audience of average citizens. We worked on honing her presentation, getting the timing right and interspersing appropriate humor in the right spots.

After practicing with me multiple times, I encouraged Dr. Jane to conduct a practice run with her entire staff of eleven employees the next day. I watched as she described to her team her fears,

her many drafts of the speech, and her decision to seek help from a performance coach. After delivering her speech to this group, she asked for their honest feedback to help her improve. Her team was astounded at Dr. Jane's vulnerability and openness to feedback. She had always been a formidable boss who seemed in complete control at all times and appeared intolerant of weakness in others. This small incident changed their perceptions of their boss and opened the doors for this entire team to communicate more effectively and honestly with each other. They gave caring yet constructive feedback that helped her deliver an exceptional presentation the following week. Through emails and phone calls I continued providing support up to and after her speech. When I last checked she was planning on taking her "show" on the road--- delivering modified versions of this speech to area women's groups, other community organizations and a local cable show. The appreciative coaching sanctuary had provided a safe container for Dr. Jane to face her fears, see her strengths, develop confidence, perform satisfactorily, and positively impact the communication dynamics among her business team.

## **Conclusions**

As Maya Angelou, US poet laureate, has stated "I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." Appreciative coaching has made these dentists and veterinarians "feel" successful, pleased with themselves and more satisfied with life. It doesn't get much better than that for this coach.

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