

# **Practice Management and Coaching**

**Kathleen O'Donnell and Kimberly Brozovich**

Some of the most rewarding coaching experiences have occurred for the two authors during their years as practice management consultants and business coaches for dentists. 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. As people in the United States are inclined to say, the "buck" truly does stop here.

In 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 professional colleague. At times you may be a performance coach, at other times a life coach helping a dentist 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 us, 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 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, 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 and ignite change.

Many times a dentist will approach us for practice management consulting asking us to 'change' their team. Typical issues that the dentist asks us to address are: poor team interrelations, inferior verbal skills, team members not meeting the dentist's expectations, etc. When we begin peeling the layers and really assess the situation, many times we find it is less about people issues than about the systems not working well and a lack of Leadership. However, peeling the layers to find out the true nature of the situation is delicate. It is important to do this while not compromising the trust and relationship with the dentist. We can appreciate the

frustrations and concerns a dentist has trying to manage a business, given that the two of us and our husbands own several small businesses, We can help.

Dr. Smith, a dentist in a cosmetic practice in Colorado, repeatedly complained to us about frustrations she had with her office manager's substandard performance. It was having a negative impact on the practice. Though Dr. Smith knew she needed to terminate this employee, she was in fear of letting her go since her employee was so well known in the community. To help the doctor overcome her fear, we began coaching her on how to confront this employee. We discussed the pros and cons of keeping this employee. Ultimately, Dr. Smith had to come to the conclusion that this employee was not going to change in the time frame or manner that she needed. Once that was determined, Dr. Smith could move to the next step of how to confront the situation by writing out a verbal script for a variety of different responses this team member might provide. In the end, Dr. Smith was overly prepared and satisfied that her decision was a good one for herself, the practice and her patients. Since that time, Dr. Smith has felt more empowered to express her needs and wants in a timely manner to her employees and no longer feels a prisoner to them.

Another example of the advantageous blend of practice management consulting and coaching concerns Dr. Lee. One of us had conducted business consulting for 8 months with Dr. Lee's successful dental practice in the Eastern United States. Even though coaching was woven throughout this consulting process, we moved to scheduled, routine, separate coaching sessions at this dentist'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 dentist, 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, one of us 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 dental 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. (1) 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, 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 too requested individual coaching. To keep boundaries clear, we 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 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 world, so it would not be too much of a stretch to engage the customers in this feedback process. Employees of dentists are eager to provide pooled feedback that may positively impact their working environments. The benefit of using 360 performance feedback systems allows employees to see how others perceive them in their organization with different perspectives. This type of feedback is crucial for a professional and her employees to make the necessary changes to improve performances, .

Two partners, with whom one of us 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. We discussed the advantages and risks involved in them completing a 360 performance feedback process. In addition, we stressed the need to combine coaching with a 360 (having observed many negative instances when a 360 was administered and feedback was given with absolutely no followup). They were eager to engage in this type of rich feedback process.

We worked with The Center for Executive Coaching, a division of The Professional School of Psychology (PSP) in Sacramento, California, to get their 360 instrument adapted for this small business and 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 three months before. Staff members perceived us as trusted external consultants, since we had worked with this team of people for three years. They were quite pleased to know that we would be managing this feedback process.

For two weeks we 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 us. We did preliminary scoring then submitted survey data for final statistical analysis to PSP.

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 predicting scores they would expect to 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 prediction of how he thought others would rate him, our dentist 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 client using more appreciative coaching techniques After reviewing specific survey questions with each dentist,

we 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, 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?
- What actions will you commit to taking? By when? How?

We 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, we prepared 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.

We 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. We 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 has become a powerful intervention strategy in our 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 we coach. Ultimately, this approach also benefits their businesses.

Both of us see a shift from spiraling negativity—looking at what is wrong and who is to blame. The dentists now focus on situations when things have gone right and formally acknowledge employees for their contributions to these successes. Once these dentist 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 the client feels better and appreciated for what they do, they will repeat that behavior. Their behavior also becomes contagious resulting in a more cohesive and productive team.

A coach working with clients who often possess a predominantly negative spin on life (as described above) will find 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.

Dr. White, a suburban dentist operating outside a moderate size Midwestern city, just purchased an existing practice. In doing so, he not only purchased the practice (building and patients) but also agreed to rehire the team along with their existing benefits and pay. At first, the team loved having this young, fresh new dentist who was much different than the previous one who was very dictatorial. They showered Dr. White with appreciation. All was well for a few months until the team began noticing they were reaching the bonus numbers but not actually getting the bonus in their paychecks. Soon, the team became disgruntled and quickly turned against this new dentist. Ironically, the previous dentist (whose departure they initially celebrated) was now missed. They wanted him back. The new dentist felt like he was failing the team and was spiraling into depression. He wanted to quit.

The team was not aware of the financial challenges facing the new dentist. Things had changed even though the practice looked the same and the patients looked the same. Even the staff looked the same -- no changes or turnover. The financial overhead, however, was now very different. Once Dr. White purchased the practice, he brought debt. The previous dentist had the practice for 35 years and had paid off his debt several years ago. The practice was in a much different place when he sold to Dr. White.

Dr. White was coached on what to say to his team and how and when to be more open. Though not 100% satisfied, the team now at least understood why they were not bonusing and no longer felt that Dr. White was hoarding the money from them. Today, they are all on the same page with a new bonus structure that is healthier for the business but still provides compensation for the 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 "feel" successful, pleased with themselves and more satisfied with life. It doesn't get much better than that for a coach who works with professionals.

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## Kathleen O'Donnell as a Masterful Coach to Professionals

### William Bergquist

While I have not had the good fortune of observing Kimberly Brozovich in her coaching engagements, I have had the privilege of observing Kathleen O'Donnell coach dentists and other professionals for many years. As her husband, I am of course biased; however, it is not often that someone writing about coaching expertise is doing so from having witnessed many coaching conversations over more than two decades. While I usually can observe only one half of the conversation (Kathleen's contribution), I can get a pretty good idea about what is happening on the other end of the line (phone, Skype, Web-EX or Go-to-Meeting).

Here are several of the key strategies that I observed Kathleen using:

- Motivating clients with appreciative perspective. Kathleen is "catching them when they are doing it right." She helps the professionals identify their own strengths and determine the best way to use these strengths when confronting difficult situations.
- Using a specific framework (personality theory) to show clients the value of differences among people they work with and serve. Kathleen makes specific use of DISC, but I firmly believe there are many frameworks, with regard to interpersonal styles, personality profiles, etc. that would work effectively in helping professionals fully appreciate the distinctive ways in which other people see and operate in the world. Kathleen will often point out to her clients how the perspective held by another person diverges in quite significant ways from the client's own perspective, often leading to misinterpretations, unanticipated reactions, and even open conflict.
- An intermixing of heart and head – calculations and compassion. Kathleen will work closely with clients on their "numbers" (e.g. monthly income and expenditures, monthly variations in number of patients seen, productivity of team members). She calculates percentages, financial and productivity trends, and comparisons with national and regional norms regarding productivity and compensation. I see her spend many an evening with her calculator in hand. Yet, on her coaching calls, Kathleen is often dealing with the "soft" data (morale issues, fears and hopes, life transitions on the part of her client and members of the client's team, anger management and other "personal" matters). It is critical for the professional that a coach offers credible evidence, given that the professional is trained to operate in a rational manner. It is also critical, however, that the coach serve as a caring and understanding source of support for the professional, who often feels very much alone in a complex and changing world.
- A first-hand evaluation of what is happening in the client's office. Kathleen does not just work with the client from her office here in the State of Maine. She is often traveling to meet with her client in person and spending one or two days observing the client's operations, as well as providing some training for staff members on office operations,

and conducting team-building workshops for the entire staff. Another critical element is the evening meeting with the client. Kathleen is able to offer immediate, first-hand observed feedback to her professional client. And this feedback is provided in a caring manner (the heart), based on direct observations and detailed notes (the head). Most importantly, Kathleen offers the feedback in an appreciative manner, focusing in particular on strengths and opportunities that match the challenges being faced by the professional in his or her practice. While I don't go with Kathleen to her on-site visits, I hear about what happens when Kathleen returns from her trip—and even more importantly I witness the remarkable breakthroughs that often occur when Kathleen is next in touch with her client. High-touch is just as important as high-tech!

These are my reflections on the work being done by Kathleen O'Donnell. She has just retired and has received very touching tributes from her coaching colleagues and even more importantly from her clients. The number of appreciative statements received by Kathleen is indeed impressive and her clients are acting like skillful coaches in that they not only offer Kathleen generalized glowing reviews but also identify specific ways in which she has had a tangible impact on their professional practice – and their personal lives. I am justifiably a very proud partner and husband. I have learned much about skillful coaching by observing Kathleen O'Donnell in action as a coach to professionals.

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### **Kathleen O'Donnell**

Kathleen O'Donnell has been an executive/business coach and a practice management consultant for many years. She has had clients in the US, Canada and the UK. Kathleen maintains an independent executive coaching business (O'Donnell and Associates) and works part time as a business coach/ dental practice management consultant with Jameson Management, Inc., Oklahoma City, Oklahoma.

### **Kimberly Brozovich**

Kimberly Brozovich is currently the Vice President of Coaching Services for Jameson Management. She works with clients in the United States and Canada. Kimberly writes articles regarding practice management for several dental organizations as well as lectures on the topic at dental meetings and dental universities. When not working with dental teams and lecturing, Kim and her husband own two small businesses in Idaho Springs, CO.

### **William Bergquist**

William Bergquist is president of The Professional School of Psychology and is co-curator of the Library of Professional Coaching and the Library of Professional Psychology. He has authored or co-authored more than 40 books and served for more than forty years as consultant and coach to leaders throughout the world.

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