



# The evolution of the Practice Manager

PRACTICE MANAGER, **MICHAEL BENTLEY**, GIVES ADVICE ON THE EVER-EVOLVING SKILLS NEEDED TO BE A PRACTICE MANAGER

Last year I had the pleasure of touring the country with Laura Horton for the Practice Plan Workshop Tour – ‘How to create the ultimate dental practice room by room’. There were many light bulb moments across the tour that struck a cord with audiences. One light bulb moment was the evolution of the Practice Manager’s (PM) role. What does it mean to be a PM in 2016? Is there a blueprint to being a successful Business Manager (BM)? Do you need two people to do these roles in practice?

I want to share with you my journey as a PM and provide some answers from my own personal experiences of being a PM for the last 18 years. When I first went into practice management at the tender age of 21, my experience culminated from a National Business Diploma qualification in Distribution Studies.

When I look back on this qualification in my dusty Record of Achievement folder (remember those?) the core skills this included were: **Finance, Distribution, Organisation on the environment, Principles of buying, Sales function and selling methods, People in organisation, Human Resource Management, Marketing and Merchandising.**

These skills, of course, were just the beginning of my journey as a PM, however on meeting many PMs, the journey of becoming one is a real mixed bag. When I meet PMs, I find it fascinating to understand what skills and life experience have brought you into this wonderful role. For so many PMs, the skills that you actually need in order to run a successful practice have been learned on the job with no support and very little training.

However, PMs are grafters; we get on with whatever is thrown at us, multi-tasking and learning as we go. But is that a good thing? The reality in practice is that PMs have not gained all the skills and knowledge they need and are being expected to take on responsibility for areas of the business that they do not understand.

In my early days of being a PM, I worked for Boots Dental Care managing a team of 30 employed staff members, including the dentists. One of the best parts about my time working for Boots was my HR training. I had days and days of training on all the areas of this heavy subject matter with role plays and assessments to confirm that I had the ability to handle any situation that occurred. I can share with you that in the last 18 years, there is very little from a HR perspective I have not experienced first hand.

For me, HR is one of the core foundation skills that a PM needs. HR is a subject you learn, not one that you learn on the job. HR requires hands-on training and an understanding of the documents and procedures that go alongside each area, whilst maintaining a clear head and not getting emotional. The practices with PMs where this knowledge is not known tend to make poor choices with team members and, in many cases, ignore team behaviour hoping that it will somehow improve tomorrow. There is a way to ensure this does happen, but without training you cannot be expected to take on this role.

So what do you do to gain the right knowledge? Well it all comes back to what is expected of you as a PM. This is critical in understanding what you know and how the business owner wants to develop you

in their business. Take a look at the roles of a PM and BM below. The role of PM has really evolved over the years and the areas I have given you are the ones that I have personally embraced on my journey as a PM. I have been in my current practice for the last 12 years and at this point in time, I am mostly providing the practice with BM roles having delegated the operational PM roles to key members of my team.

Before we discuss that in more detail, let’s first understand where you are. I have devised a three-stage decision-making tool below for you to self assess/grade your knowledge and practical application in each area of the PM and BM activities. Take each area in turn and rate yourself from 1 to 3.

- 1 Knowledge weak - No practical application
- 2 Some knowledge - Average practical application
- 3 Formalised training - Good practical application

For example, for myself, I would grade myself a 3 for the BM role for performance management, disciplinary, grievance and dismissing an agent. The reason for my score is because of my formalised training in HR and my years of active practical application. I would also score myself a 3 for CQC knowledge in the PM section. I have attended formalised courses on CQC and continue to do online workshop sessions, combined with working with a CQC company who alert me to all the changes on a monthly basis so that I can be up to date. I carry out audits which allow me to have a good practical understanding that the systems are working in the practice and they meet the expected standards. →

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Have a go and see how you score. It will give you a clear understanding of what areas you are confident in at the moment and areas for your self-development. This is a great tool to have when discussing training with the practice owner(s).

### PRACTICE MANAGER

|   |  |
|---|--|
| Personnel, probationary, induction reviews  |  |
| Diary management systems, recalls, DNAs, new patient tracking, cancellations, follow up |  |
| Emails, practice visits   |  |
| Repairs and maintenance contracts   |  |
| Staff training  |  |
| CQC management  |  |
| Rotas, holidays, sickness   |  |
| Stock management  |  |
| Staff welfare   |  |
| Patient complaints  |  |
| Records management  |  |
| Computer security/upgrades, practice security   |  |

### BUSINESS MANAGER

|  |  |
|--|--|
| Staff recruitment  |  |
| Finance, trading account, cash sales, membership, loans              |  |
| Vision management  |  |
| Performance management, disciplinary, grievance, dismissing an agent |  |
| Marketing, branding, publicity, social media                         |  |
| Customer service   |  |
| Performance indicator, appraisal, staff satisfaction                 |  |
| Treatment/clinical coordination                                      |  |
| Multi team - delegation of activity                                  |  |

- 1) Knowledge weak - No practical application
- 2) Some knowledge - Average practical application
- 3) Formalised training - Good practical application

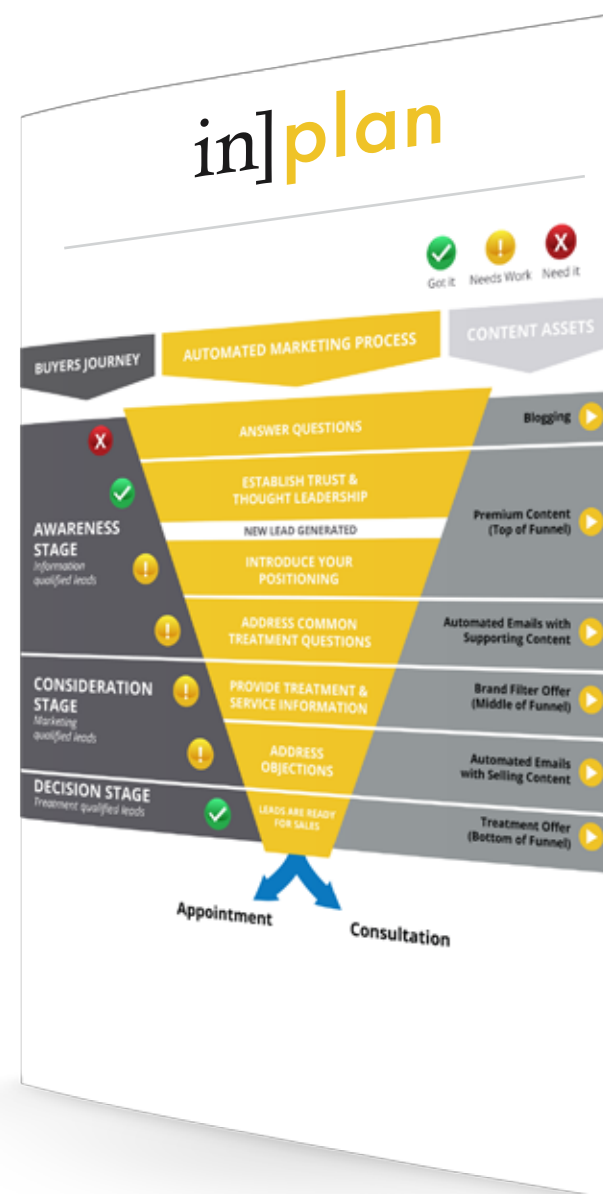
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“ONE OF MY MENTORS TOLD ME, IT IS THE DAYS WHEN YOU ARE NOT IN PRACTICE AND IT ALL RUNS SMOOTHLY THAT YOU KNOW YOU HAVE TRAINED YOUR TEAM WELL”

The next stage is to place areas that have scored 1 and 2 into a priority list. When you have completed your priority list then you can schedule a meeting with the owner or owners to go through your findings with a view to creating a development plan with them. The plan needs to reflect the business needs, but it is important that you attend training courses or take on qualifications to gain additional skills for your chosen development.

If you don't know how to approach this conversation then treat it like the dentists treat their own CPD. As you will know, they are required to keep up to date and refresh key areas that have been decided for them by the GDC. On top of those areas, the dentists then attend additional courses to learn improved techniques or an entirely new skill within their scope of practice. Dentists can only stay current and grow their practices by self-development and this is no different for you as a PM.

I said I would answer the question of, 'do you need a PM and a BM in your practice?' In my opinion, if you are a single owner then the answer is - 'not necessarily'. If you have multiple practices then this combination can work extremely well, but then these two people are funded by a number of practices they manage together, so it is viable.

If you have this structure then the PM is normally the operations manager (reactive manager) and the BM is the (proactive manager) working on driving the practices forward.

For single practice owners, this model does not have to be employed. In my practice, I have spent years working with my team to take on reactive roles of the business. This has worked very well for me as it has allowed me to grow the skills of key members of my team.

My advice is to spread the roles across a few team members, ideally working on their passions. For example, diary management is managed by one person in my practice. They are passionate about the diaries and making sure everything for this area is controlled.

Therefore, diary management is managed extremely well by this team member and, in most part, without me having to do anything practically. However, you do need to make sure that you are on hand to support and direct where needed. Remember, as the PM, you will always be ultimately responsible for whatever you delegate.

#### Here are my top tips on delegation

- #1 Do not ask someone to do something you do not know how to do yourself. You must devise a foolproof system for what you want to delegate that can be followed.
- #2 Time how long it takes you to do the system.
- #3 Give the person double the amount of time you would yourself to achieve the system.
- #4 Make sure when delegating a system that the person wants and has the time to do it.
- #5 Train the system you have devised.
- #6 Observe the person to understand that they can do the system and they know what is expected of them.
- #7 Be on hand to support where necessary.
- #8 Give positive feedback on completion of a system you have delegated.

If you follow my tips you will allow yourself time to breathe so that you have the opportunity to grow as a PM. I know first-hand how quickly a week can go by in practice, firefighting all the way and feeling like you have achieved nothing. Please be reassured that I still have a few weeks in practice where all best laid plans go out of the window, you roll up your sleeves and it's all hands on deck - that is real life.

My main evolution as a PM was making a concerted effort to continue to learn and to trust my team. I was the PM that wanted to control everything and it was to my detriment in my early days. I needed to go through that process of understanding each cog of the business, but also understand that my role is to develop my team and the business.

Delegation of PM activities allows the team to operationally run the practice without you. One of my mentors told me, 'it is the days when you are not in practice and it all runs smoothly that you know you have trained your team well'. For those managers that have to be there all the time or everything falls apart, then you have to learn the art of delegation and systems. ●

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If you want to develop your management skills, Michael is providing the first stage of a new training course 'Practice Management in Focus' - a course designed for Business Owners and Practice Managers to learn practical steps of management with Practice Plan. For more information, please go to page 45.