

# The Power of Clarity: Streamlining Roles and Expectations in Your Dental Practice

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Imagine driving on a busy highway without lane markers, speed limits, or exit signs. The result would be chaos, with people driving where they wanted and traffic grinding to a halt. Lane markers and signage on a highway allow cars to go faster because everyone on the road has a shared understanding of the rules of engagement. It is no different in your practice, where you, as the leader, must work to ensure that your team clearly understands their role. This allows them to execute at a high level and provides a clear sense of direction, making them feel more focused and purposeful in their work.

## The Gift of Clarity

Clarity in roles and expectations is not just beneficial but essential in practices. This is especially true as your practice grows. For smaller settings, such as a practice with two operatories, one hygienist, one assistant, and one front office staff, informal role definitions might be sufficient as everyone adapts quickly to daily operations. However, communication becomes challenging as your practice expands to include more team members. In a complex environment, the lack of clear role definitions and explicit expectations can lead to frustration, distrust, and confusion among the team, severely disrupting team dynamics. This disrupts your practice's functionality and can contribute to a higher turnover rate, as employees may leave in search of less chaotic environments.

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Clarifying roles and expectations is equally critical for the practice leader, who must effectively manage the team. Without explicit guidelines, your team may not fully understand your expectations, leading to suboptimal performance and inadvertent mistakes—issues that become magnified as the practice grows. This misalignment can also complicate the dynamics of team leadership. Clearly defined roles and objectives

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**Your goal is to include as much detail as possible to paint a comprehensive picture of the team member's role.**

## Building your Role Descriptions *(continued)*

The Job Posting will follow the same format as the Role Description but will include a paragraph at the top describing your practice and why it is special. This is essential as it will help “sell” the practice to potential candidates who should connect with your practice’s vision for care.

The main difference in the content of the Job Posting is that it lists only the most essential elements of the role in enough detail that a reasonable person should understand what the role entails as opposed to the Role Description, which has all the details a team member would need to be successful in the role.

Let’s look at the Key Responsibilities section of a Role Description for a front office role and see how the Job Posting compares:

### **Role Description:**

#### **Key Responsibilities:**

##### **1. Patient Interaction:**

- Answer phones promptly and professionally, focusing on scheduling new patient appointments and addressing existing patients’ inquiries.
- Follow up with new and existing patients to ensure they keep their commitment to the confirmed appointment.
- Greet patients with courtesy and positive energy, ensuring they have everything needed to make them comfortable for their appointment.

##### **2. Appointment Management:**

- Coordinate and schedule patient appointments effectively to ensure on-time start for both new and existing patients.
- Manage and verify patient insurance details accurately before appointments, informing patients about their coverage and out-of-pocket costs.

##### **3. Patient Care and Follow-up:**

- Ensure patients leave with a clear understanding of their next steps in treatment, financial arrangements, and their next appointment scheduled.
- Make courtesy calls to ensure the treatment was comfortable for them and answer any new questions they might have.

##### **4. Patient Engagement:**

- Aim to increase patient engagement during the visit to ensure patients have the best possible experience.
- Understand their excitement for treatment or if they are nervous, keep them comfortable and reassured.
- Provide a positive experience by addressing patient needs and concerns promptly and encouraging feedback about their visit to continually improve the practice.

### **Job Posting:**

#### **Key Responsibilities:**

- Answer phones promptly and greet patients warmly as they arrive.
- Coordinate, schedule, and follow up on all patient appointments efficiently, ensuring an on-time start for patient appointments.
- Manage and verify patient insurance details accurately before appointments, informing patients about their coverage and out-of-pocket costs.
- Ensure patients leave with a clear understanding of their next steps in treatment, financial arrangements, and their next appointment scheduled.

The Role Description details all the tasks that the person would undertake, while the Job Posting uses a few bullets to convey the essentials of the role in a way a reasonable person will grasp.

## Building your Scorecard

With your Role Description and Job Posting complete, it is time to move on to the Scorecard. The Scorecard is about setting measurable success metrics, as opposed to the Role Description, which describes tasks and attributes. The Scorecard distills key elements of the role and then prescribes a way to measure them so that the employee has a black-and-white definition of what it is to be successful in the role.

Here is an example of a Scorecard, this time for a front desk role:

Goal	Points	Metric
Increase patient satisfaction	20	Ensure that patients fill out 5 positive feedback forms weekly.
Ensure timeliness of appointments	20	Achieve 95% on-time start for new patient appointments through effective coordination and scheduling efficiency.
Improve Insurance Verification	15	Achieve a 98% accuracy rate in verifying insurance details before appointments, ensuring patients are informed of their coverage and out-of-pocket costs before treatment.
Ensure Patients Walk Out with Financial Arrangements	15	Ensure that 95% of patients walk out having paid or with an accepted financial arrangement.
Patient Retention	20	Ensure 95% of patients leave appointed for their next visit

The key with the Scorecard is to consider what value the role brings to the practice and how to quantify that value into a measurable target. This does not dictate how they get there, only the standard. As you can see in this Scorecard, the front desk in this practice is the patient's first contact and last impression, and their role is to make sure the patient shows up to their appointments, is fully informed and satisfied with their visit. To achieve these metrics, the front desk team member must be a great communicator focused on the details that make a practice successful.

Beyond giving the employees clarity while working, the Role Description and Scorecard are a blueprint for the questions you ask during the interview process. Your goal in the interview is to assess how likely a candidate is to fulfill everything in the Scorecard. You will design your questions to ensure you unearth the candidate's key knowledge, skills, and abilities to determine if they align with what you have written in the Scorecard. In my next article, I will address what specifically to ask during an interview but remember that none of the questions will have meaning if they are not tied to what the role entails.

Ultimately, having a clear Role Description and Scorecard for each employee will help the office run more smoothly, as everyone will know their jobs and what success looks like. Once you have created your Role Descriptions and Scorecards, I encourage you to share them with the whole team. When everyone knows what they need to do and clearly understands what their teammates are doing, they can begin to see how their roles should intersect to achieve the practice's vision. The goal is that your office runs like a highway on a typical weekend. Cars move smoothly, and everyone gets to their destination quickly and in one piece.

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