

*"The purpose of life is a life of purpose."*

-Robert Byrne

*"Many people are like a wheelbarrow – they go no further than they are pushed."*

-Unknown

*"We are told never to cross a bridge until we come to it, but this world is owned by men who have 'crossed bridges' in their imagination far ahead of the crowd."*

-Unknown

*"Nearly all men can stand adversity, but if you want to test a man's character, give him power."*

-Abraham Lincoln

*"Being busy does not always mean real work. The object of all work is production or accomplishment and to either of these ends there must be forethought, system, planning, intelligence, and honest purpose, as well as perspiration. Seeming to do is not doing."*

-Thomas A. Edison

*"It is only as we develop others that we permanently succeed."*

-Harvey S. Firestone

## *Do You Need An Office Manager?*

This is a big question facing many orthodontists today, and unfortunately there is no easy "yes" or "no" for anyone. Your need for an office manager is dependent on many criteria, and the manager's role in the practice varies among offices. Some practice management forms advocate "self management" and are totally against having a person on the staff with the title "Office Manager" or "Office Administrator." I do not agree with this because every practice is unique, and let's face reality, not every office is staffed with a group of self-motivated people. If you eliminate management in this situation, chaos results.

Many management consultants recommend always appointing an office manager, and I disagree with this philosophy also because I have consulted with offices that were running beautifully without a manager. These offices were either very small or staffed with a group of self-motivated people that practiced excellent team work.

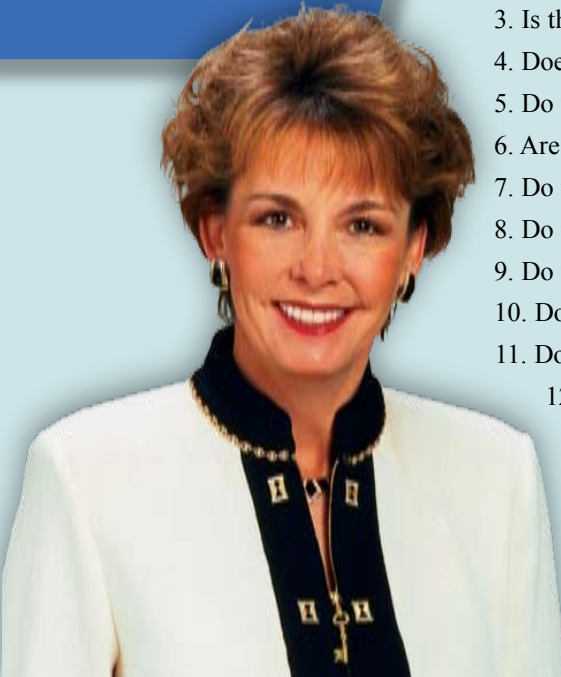
If you are unsure about whether or not to appoint an office manager, there are several questions you should consider:

1. Do you feel a need for someone to help you with the administrative aspects of your practice?
2. Are you experiencing stress due to lack of staff motivation?
3. Is there a lack of organization in your practice?
4. Does the teamwork need improvement?
5. Do you feel the need to check up on your staff to make sure the job has been done?
6. Are you troubled by inner office conflicts?
7. Do you feel there is a lack of communication between you and your staff?
8. Do you have cliques in your office?
9. Do you feel stress due to lack of office policies being carried through?
10. Do you ever feel like it's you against the staff?
11. Do you want a person to help you lead your team?
12. Are you a multi-doctor practice?

If the answers to these questions are YES, it indicates a need for an office manager in your practice.

Many of my clients have experienced a tremendous decrease in their amount of stress

*article continued inside issue...*



and an increase in their professional enjoyment after appointing a qualified person to help them lead their team.

## WHAT IS THE ROLE OF AN OFFICE MANAGER?

This is an area that I know many doctors are uncertain about because 50% of the managers attending our “Office Manager Workshops” are in the role of “sort-of-office manager.” This type of situation creates frustration for the doctor, the manager, and the staff. The office manager needs the title and the authority to be effective, and only the doctor can make that a reality

Let’s look at some of the situations that create the “sort-of-office manager” role:

1. If something goes wrong, the doctor gets frightened and takes some authority away from the sort-of-office manager. On the other hand, if the doctor is feeling stressed, it becomes convenient to re-delegate to this person. The doctor/office manager relationship must be cultivated over a period of time. The doctor must place his/her trust and confidence in the manager to prevent diminished morale.
2. Many doctors are unwilling to make a commitment by announcing a staff member’s appointment to the position of office manager. Often one person has taken the responsibility of office manager on their shoulders to fulfill the doctor’s requests and to meet the leadership needs of the practice. The doctor may be reluctant to announce the appointment fearing the other staff members will object. This creates a frustrating situation for all. The doctor must make a decision based on what is best for the practice.
3. Many doctors have been reluctant to give their “sort-of-office manager” authority because the person has risen up through the ranks and the practice, but does not possess the necessary skills to manage people. That is exactly why we developed our leadership workshop for orthodontic office managers. There is a tremendous need for advanced management training for the women who are going to be leading the orthodontic staff of the future. Continuing management education and self study are essential to developing the management and people skills necessary to effectively lead an orthodontic team.

To prevent the sort-of-office manager role from holding back your practice, I recommend the following:

1. Find the right person that you respect and trust.
2. Outline this person’s job description for the team.

3. Make an announcement to the staff regarding the appointment, and the manager’s role in the practice.
4. Make a commitment to support this person 100% by not doing her/his job.
5. If you want to take an interim step, appoint a “Communications Coordinator”. This is a person who assists the doctor with staff communication, events, and procedures but does not have supervisory responsibilities.

Many managers undermine their authority by being message carriers for the doctor. For example: “Dr. Smith wants all of you to clean the sinks better starting Monday”. This is not the role of a good office manager. An effective office manager would say, “We all have a responsibility to keep our office clean for our patients. The sinks were not cleaned yesterday. Let’s talk about setting up a system to prevent this from happening in the future”.

## JOB DESCRIPTION OF AN OFFICE MANAGER

The staff needs to be fully aware of the responsibilities of the office manager. The following is a sample job description of an office manager. Each practice must design their own to meet the needs of their office.

- Responsible for all personnel issues in the practice. To include the following:
  - Recruiting, hiring and training of all staff (clinical and administrative)
  - Management of all staff compensation (i.e., insurance, retirement, etc.)
  - Daily staff management
  - Annual performance and salary reviews of all staff
  - Any necessary probation or dismissal action against staff
- Coordinate all staff meetings (i.e., daily morning huddles, weekly staff meetings, and retreats)
- Coordinate any staff functions (i.e., staff picnics, holiday parties, etc.)
- Act as a liaison for the staff on issues that demand the doctor’s attention.
- Maintain all personnel records.
- Maintain the annual staff empowerment calendar and make sure that all birthdays, anniversary dates, etc., are recognized.
- Act as a liaison between the financial coordinator and the accountant to verify that the financial systems are working properly.
- Frequently review the scheduling coordinator’s template to be sure that the appointments being scheduled adhere to office requirements.
- Oversee staff schedules.

- ~ Stay abreast of new developments in training (i.e., home study courses, seminars, etc.) that may be of value to the staff and doctor(s).
- ~ Supervise all marketing strategies of the practice.
- ~ Be properly trained to act in the role of New Patient Coordinator, Appointment Coordinator, or Financial Coordinator when necessary.
- ~ Handle any customer service concerns of parents or patients.
- ~ Oversees all business systems monthly in the practice.
- ~ Must constantly look for ways to streamline office systems.
- ~ Responsible for keeping the practice's policy and procedure manual updated and making sure these policies are followed.
- ~ Insure that the office facilities are well maintained.
- ~ Oversee any major projects for the practice (i.e., computer purchases, facility renovation, etc.)

## QUALITIES OF AN EFFECTIVE OFFICE MANAGER

The following qualities are highly desirable in this position:

- ~ Energetic person who works the hours needed to get the job done.
- ~ Understands the big picture of the practice and shares the same values of the doctor.
- ~ Honest and direct with their communication. Can tell people the truth in a caring yet direct way.
- ~ Unwavering support of the office manual protocol.
- ~ Keeps confidence of the doctor and staff. The staff learns they can trust the manager.
- ~ Sees both sides and works to find win/win solutions.
- ~ Does not show favoritism.
- ~ Motivates and empowers the staff with their actions and communication.
- ~ Frequently solicits feedback from the staff regarding their thoughts and feelings.
- ~ Develops healthy communication lines with the doctor and is not afraid to be assertive when needed.
- ~ Is viewed by the staff as a hard worker and totally committed to the purpose of the practice.
- ~ Is professional in their look and their actions.
- ~ Proactively takes action and gets things done.
- ~ Knows how to have fun with the staff and still remain effective as a manager.
- ~ Creates a zero fear level. The staff members feel safe in discussing their feelings with the manager.

## EVALUATIONS OF THE MANAGER

Once every 6-12 months, the staff should have an opportunity to evaluate the manager. Confidential forms should be given to the staff. The forms should be returned to the doctor to review. The doctor should discuss the positives and any constructive feedback gleaned from the evaluations with the manager. A synopsis of the evaluations from the leader is more effective than reading them individually. A good manager desires feedback on how they can better serve the team.

## PERCENTAGE SPENT ON STAFF SALARIES

I have reported in many previous publications that the total of staff salaries (not including lab technicians) range from 18%-23% with the average being 20%. This is the total amount of the W-2 forms. If a doctor decides to add an office manager who does not also function as a financial coordinator, new patient coordinator or appointment coordinator, it will increase the percentage by approximately 2%.

Many doctors tell me that the additional investment in the budget is well worth it because of their reduced stress level. They gladly give up the extra percentage. An effective office manager also helps keep the production moving up therefore balancing out the addition to the salary percentage.

Whether you hire this person from within the practice or hire someone new, it makes no difference. The key is hiring a person with leadership qualities that base their decisions on what is best for the practice. When you initiate the position of office manager, some resistance from the staff is to be expected. Any change takes time to get used to, but if hire the right person, that feeling is temporary. The benefits of having an effective office manager soon outweigh the negatives.

*We would like to take this opportunity to thank all of the office manager's that have attended our workshops in the past, and for their kind words of praise about their experience.*

***Our next Office Manager Workshop  
will be October 20 & 21, 2005  
Orlando, Florida***

## Recent News

Our first **“Marketing Your Orthodontic Practice”** workshop which was held on October 7 & 8, 2004 in Norfolk, VA was a great success! We had a great group of attendees who not only left with a lot of great marketing ideas and an annual plan, but also came with some great ideas. The sharing and interaction between everyone was just great. Mark your calendars for our next **“Marketing Your Orthodontic Practice”** workshop on March 3 & 4, 2005 In Las Vegas, NV and October 6 & 7, 2005 in Virginia Beach, VA



**“It is always fun to come to your seminars, meet new friends, gain new ideas, and share, share, share!! Thanks!”**

Karen Barrett  
Office of Dr. Rick Herrmann  
Mansfield, TX

**“Your seminar has re-invigorated us to attack marketing and track results. Thanks!”**

Karen Barrett  
Office of Dr. Rick Herrmann  
Mansfield, TX

## Where in the World is Charlene White

Date	Event	Location
January 13-15, 2005	The Damon Forum	Palm Springs, CA
February 25, 2005	Peak Performance for Doctors & Spouses	Miami, FL
March 3-4, 2005	Marketing Your Orthodontic Practice Workshop	Las Vegas, NV
March 11-14, 2005	Practice Work’s User’s Meeting	Atlanta, GA
March 17-19, 2005	5-Star Orthodontic Practice for Entire Staff	Cancun, Mexico
	Peak Performance for Doctors & Spouses	
March 31-April 1, 2005	New Patient Coordinator Workshop	Atlanta, GA
May 20-24, 2005	AAO National Meeting	San Francisco, CA
August 3-6, 2005	Australian Study Club	Townsville, Australia
August 26-27, 2005	Annual East Coast Convention	Virginia Beach, VA
	Dr. Dwight Damon – Guest Speaker	
October 6-7, 2005	Marketing Your Orthodontic Practice Workshop	Virginia Beach, VA
October 20-21, 2005	Office Manager Workshop	Orlando, FL
November 3-4, 2005	New Patient Coordinator Workshop	West Coast
		Location to be Announced
November 10-11, 2005	Northeastern Society of Orthodontists (NESO)	New York, NY
November 18, 2005	Western Pennsylvania Society Meeting	Pittsburg, PA





# How To Create Enthusiasm

**E**nergizing yourself  
**N**o negative thoughts  
**T**hank people a lot!  
**H**i! How are you today?  
**U**nderstand 1st  
**S**mile a lot!  
**I**nterest yourself in others  
**A**llow time to sharpen your ax  
**S**elect your friends carefully  
**M**ake things happen – in your life  
 & in your job. Take pride.

## Schedule Forecaster for 2005

The purpose of forecasting the schedule is to create smooth flowing days. Light days and heavy days create stress in the office. It also creates front to back tension. It is important to put a structure in place to prevent this from occurring. The instructions for using this are as follows:  
 \*Mark off all weeks and days the office will be closed for seeing patients. \*Record the number of patients seen on the patient days on the line next to the date. \*Post this by the scheduling computers. \*Project where patients will be scheduled at your morning huddle.

Dec 27 ___	Feb 7 ___	Mar 21 ___	May 2 ___	Jun 13 ___	Jul 25 ___	Sep 5 ___	Oct 17 ___	Nov 28 ___
Dec 28 ___	Feb 8 ___	Mar 22 ___	May 3 ___	Jun 14 ___	Jul 26 ___	Sep 6 ___	Oct 18 ___	Nov 29 ___
Dec 29 ___	Feb 9 ___	Mar 23 ___	May 4 ___	Jun 15 ___	Jul 27 ___	Sep 7 ___	Oct 19 ___	Nov 30 ___
Dec 30 ___	Feb 10 ___	Mar 24 ___	May 5 ___	Jun 16 ___	Jul 28 ___	Sep 8 ___	Oct 20 ___	Dec 1 ___
Dec 31 ___	Feb 11 ___	Mar 25 ___	May 6 ___	Jun 17 ___	Jul 29 ___	Sep 9 ___	Oct 21 ___	Dec 2 ___
Jan 3 ___	Feb 14 ___	Mar 28 ___	May 9 ___	Jun 20 ___	Aug 1 ___	Sep 12 ___	Oct 24 ___	Dec 5 ___
Jan 4 ___	Feb 15 ___	Mar 29 ___	May 10 ___	Jun 21 ___	Aug 2 ___	Sep 13 ___	Oct 25 ___	Dec 6 ___
Jan 5 ___	Feb 16 ___	Mar 30 ___	May 11 ___	Jun 22 ___	Aug 3 ___	Sep 14 ___	Oct 26 ___	Dec 7 ___
Jan 6 ___	Feb 17 ___	Mar 31 ___	May 12 ___	Jun 23 ___	Aug 4 ___	Sep 15 ___	Oct 27 ___	Dec 8 ___
Jan 7 ___	Feb 18 ___	Apr 1 ___	May 13 ___	Jun 24 ___	Aug 5 ___	Sep 16 ___	Oct 28 ___	Dec 9 ___
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# Marketing Calendar

Month	Patients & Parents	Your Team	Referring Offices
<b>FEBRUARY</b>	Promote National Dental Health month in your office. Hand out free toothbrushes and referral cards encouraging patients to refer their friends for a complimentary ortho exam.	Register your team for our <i>“Creating a 5-Star Orthodontic Team”</i> seminar in <b>Cancun, Mexico March 18, 2005</b> – For more info go to <a href="http://www.charlenewhite.com">www.charlenewhite.com</a>	Send an attractive invitation to your top 10 referring doctors and spouses for a Valentine dinner for two at a restaurant of their choice.
<b>MARCH</b>	Decorate your office in St. Patrick green for the month. Serve green drinks and cookies. Contest – guess the # of shamrocks in the jar.	Review a customer service video/DVD together as a team. Vote on a “Star Performer” at the end of the month and give a prize.	Fax or e-mail a list of all patients from each referring doctor currently in your practice. Ask them to let you know which patients have missed their recall appointment.
<b>APRIL</b>	Order umbrellas with the office logo and quote, “We shower our patients with care.”	On a non-patient day, plant flowers together at the office(s) to create a more beautiful place for your patients to visit. Surprise each team member with a plant to take home.	Deliver daffodils or crocus to your top 20 referring offices to celebrate spring!



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