

TAKING CHARGE

When managing your own business, **Hanya Oversby** says setting Key Performance Indicators for staff is essential for workplace harmony.

Dr Greenwood walks into his practice and senses the tension but manages to avoid any discussions with his staff as he rushes into his office and closes the door. “Let it wait until my busy day is over,” he grumbles to himself. He checks his email and phone messages then wades through the pile of paperwork awaiting him. His receptionist buzzes through to say his first patient has arrived and the day begins.

Each time Dr Greenwood approaches the reception area, he senses the negative energy wafting around his staff. “Whatever the issue is it will resolve itself soon,” he thinks to himself as he keeps on marching through the day. The situation worsens – of course – as he endeavors to keep up with expertly managing his patients and asks himself, “Who has the energy to deal with this stuff when I’m plugging away just to get through the day making sure my patients are receiving the best possible treatment?”

STRATEGIC THINKING

We all start out with the best intentions of creating a harmonious and well-organised workplace, but sometimes things just seem to slip out of our control. The good news is that by implementing some effective systems for your staff to adopt and follow, it’s possible to avoid the above scenario.

As a medical specialist business consultant, I have had the opportunity to

work with many practices. Through this experience, it has become apparent that there are some common strategies used that consistently assist a business in developing effective and efficient systems. Among these many strategies, a key tool is the management of staff via the setting and monitoring of Key Performance Indicators (KPIs).

Issues often occur in a practice when staff are unclear with regards to the following:

- **The Business Plan** – i.e. the vision, plans and goals of the practice.
- **Leadership** – when the organisational structure and parameters of authority are not clearly established.
- **Job Descriptions** – when staff are unclear of the jobs they are required to perform within their role at the practice.

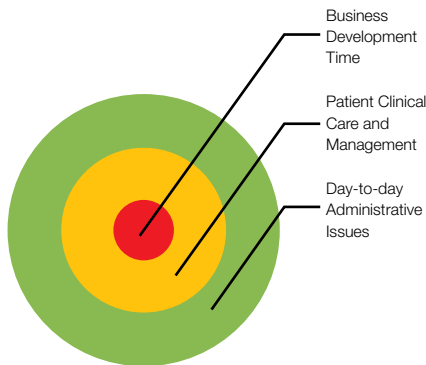
The first step in managing your staff would be to clearly outline these parameters. Ideally, a practitioner should be able to find time in each week to work on business development (as shown as the inner circle in Figure 1). Unfortunately this usually doesn’t happen, as busy doctors are often trapped in the outer circles of administrative tasks and seeing patients. The key to achieving time to develop the business is to implement effective systems that allow doctors to delegate jobs to their staff and keep a finger on the pulse by regularly monitoring the established KPI for each staff member.



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Figure 1

The elusive inner circle of business development time



MEASURING UP

KPIs should be developed in relation to the identified tasks that add value to the practice. Using a receptionist as an example, the KPI could be as simple as:

Quantative KPI – measurable by producing evidence of performance:

- Ensuring all tasks on the opening and closing procedures checklist are performed daily and signed off. These checklists can be checked on a weekly basis.
- All patients are billed and payment is received on the day. Any delayed payments must be followed up as soon as possible. Daily or weekly monitoring of financial transactions can be a measure of this KPI.

Qualitative KPI – measurable by observation and feedback of staff performance:

- Phone calls into the practice are answered within four rings and the enquiry is dealt with effectively and efficiently. The receptionist must also be personable, as he or she is the frontline marketing to your practice.
- The staff member is working as a team member and takes on an equal share of the workload.

TIME WISE

Again, the challenge of being able to consistently monitor these KPIs is time. Ideally the appointment of a manager or position of responsibility within the practice is beneficial to ensuring the expected standards of the practitioner are met. As business thinker Michael E. Gerber points out in *The E Myth Physician*, “People allow you to be everywhere you want to be simultaneously, without actually having to be there physically!”

Whether you have appointed a manager or are managing the business yourself, your time is best invested in identifying the key KPIs that are important in demonstrating the health of your practice. Once identified, the reporting of these KPIs should be in a template form and reviewed regularly. An effective method is to use a color-coded dashboard reporting tool, which uses information exported from your practice software and your accounting software (as shown in Figure 2).

Managing your business and staff is no different to observing the condition of your patient – you look for the telltale signs that may cause greater health problems. By monitoring the KPI you have established for your staff and your business, you are able to identify those elements that are causing damaging trends and poor performances within your practice. This will give you the ability to deal with any issues before they become critical, thus keeping your business on a healthy path. ☺

Figure 2

