



ORTHO2

One on One Annual Review

Regardless of how you name it:

by **Rosemary Bray**

Performance evaluation

Job review

One on one

this extremely important sit down time between doctor and staff member is not only advisable for improved job performance, but it is also critical to ensure communication within an optimum employer/employee relationship. Whether the staff member is brand new on the team, or is the practice's most seasoned veteran, a regular "One On One" meeting should occur each and every year, without fail. The actual details or format of the meeting can be determined by the personality type and the management style of the doctor, however, 3 Basic Principles should apply:

1) Consistency- by scheduling this 30 to 60 minute conversation on or near the anniversary of employment, you will find it easier to remember to do it and it's a good way for both parties to realize and to acknowledge the increasing tenure of dedicated, long-term staff.

2) Have It In Writing - the written format to be used can be obtained from various management companies, or better, developed to suit your own practice personality, your style and your goals. The one I like asks both doctor and staff to complete the same form and then compare their responses. It is interesting to see how varied the opinions can be between doctor's perception and the staff member's own personal beliefs. This can make for some good conversation! Both parties should retain a copy of each other's evaluation form as well as their own. Examples of areas discussed can be...

a. What I like most about my job description or duties, and why

b. What I like least about my job, and why

c. Areas I feel I excel or perform well

d. Areas I feel weak, untrained or less skillful

e. Steps WE can take to improve my performance level and knowledge in these areas and a date to meet again to re-evaluate my progress.

f. Short and long term goals and expectations (wishes and dreams)

g. Then list about 20 specific traits and rate the employee from 1 to 10 for performance in each category (e.g., promptness, dependability, technical skills, communication, grooming, leadership, teamwork, etc.)

3) Confidentiality - The entire content of this One On One communication should always stay totally private and not be shared amongst other team members. Doctor, do not mention to Linda what you said to Sharon, positive or negative.

Staff members, do not share with coworkers your forms, your grades, or the doctor's comments. I believe the sharing of this confidential information, as with salary/benefit details, is grounds for termination. "One On One" says it all! It's not a "One On Two, or Three, or Four". Let's keep it that way. Both parties will be reluctant to sit down again next year, or to confide again at ANY time, knowing that promised confidentiality cannot be guaranteed.

One last thought about this most valuable practice communication. Because the staff member has worked another year, the One on One time does not necessarily mean "Raise Time". Salary increases really should be based on merit, growth, value and overall contribution to the practice. Employers should bar the raises until employees raise the bar.

A raise can and should be awarded at any time the doctor feels a team member warrants and deserves it. Certainly salaries and benefits should be discussed during the One On One, but let the increase be based on 1) the discretion of the doctor and 2) the performance of the staff member, not merely the date on the calendar.

COMMUNICATION remains the most critical aspect of good orthodontic business and, unfortunately, the most difficult to master. Incorporating this annual, open, honest, safe communication opportunity into your office will keep your team on the Road To Ortho Success. ♡

About the Author



Rosemary Bray has more than 30 years experience in the dental profession, including 16 years as an Office Manager and Treatment Coordinator in an orthodontic practice. As an orthodontic consultant and professional speaker since 1998, Rosemary has lectured nationally and internationally on a variety of topics, specializing in new patient exams, marketing, customer service, communication skills, and team building. She can be reached at (760) 268-0760 or via www.rosemarybray.com.