Managing performance in your practice

Delegates at the BDPMAs spring management development seminars discovered tools for undertaking effective appraisals, but here, we take it one step further and look at why no practice should be without the process of performance management.

Which manager are you?
You live and breathe performance management and in conjunction with an annual appraisal your team members have regular reviews.
You undertake an annual appraisal to some extent or with some people.
You want to introduce performance management but you don’t know where to start.
You can’t see the benefits of performance management to either the employees or the practice.
According to research, most folk fall into categories B and C. The point of this article is to explain how a well-run appraisal system in conjunction with a performance management approach can help you and the practice.

What is appraisal?
An appraisal system is a management process for maximising the performance and contribution of employees in an organisation. The outputs are an agreed set of future work objectives for each individual together with a plan that addresses personal development needs.

An effective appraisal system helps to engage and motivate employees. According to recent and extensive research by the Chartered Institute of Personnel and Development and the Institute of Employment Studies, the three things that are most likely to get employees really engaged in helping your business to be successful are:
• Good communication (for example, opportunities to feed views upwards / share opinions / be involved in decisions)
• Being enabled to develop in the right way. Your most costly resource is your people so you must ensure you are getting maximum return from your investment.
• Perceiving that the boss cares about the well-being of staff
A well-run appraisal system and a constructive appraisal discussion tick all three of these boxes.

Performance management vs appraisal
The term performance management is the generic name given to various techniques that ensure the practice delivers on all fronts against set expectations, for example, objectives.
Don’t confuse an appraisal with performance management. An appraisal is only one part of a performance management system. The appraisal is undertaken every six to twelve months and therefore is not frequent enough to enable the management of business performance. For instance, you cannot imagine waiting twelve months to inform a member of your team that he/she was not meeting his/her objectives!
If those objectives are truly critical to the achievement of the overall practice objectives – as they should be - then the practice could be in dire straits.
A more frequent mechanism is therefore required and should take the form of monthly reviews. The normal reaction to this statement is horror because managers worry about where they will find the time to undertake monthly staff reviews.
The answer is this – as a manager there is nothing more fundamental than ensuring your team are doing the right things, and that you have a system for knowing they are doing these things right. It needn’t take a long time, often ten to fifteen minutes each month is all that’s required to ensure everyone remains on track.

Struggling with implementation?
Many practices set budgets, undertake appraisals and agree objectives with team members but fail to understand that these are pieces of a jigsaw that ultimately belong together. Treating these activities as discrete processes rather than trying to achieve congruence, for example, all objectives and activities are pulling in the same direction, is exactly why many managers feel unconfident to undertake appraisals and why they feel performance management is just a huge time waster.
It is almost impossible to undertake appraisals or manage performance without having a business plan for the practice. If you don’t know where you are heading and if you haven’t mapped out what success looks like in terms of key business objectives then how can you possibly give direction to any member of your team?

Performance management benefits
The advantages of running an effective performance management system are huge. Here are just some of the key benefits:
• It enables you to tackle underperformance immediately and therefore keeps morale high throughout the team because standards are maintained.
• It ensures that every member of your team is doing the right things in the right way. Your most costly resource is your people so you must ensure you are getting maximum return from your investment.
• It is a motivational tool that facilitates development of the right people and ensures your performance is tackled.
• It increases the likelihood that the practice achieves its overall objectives.
• It improves staff retention.
It provides a formal route for constructive two-way feedback that ensures you are fully aware of what’s going on in the practice.

A team effort
Principals and managers should work together to clarify the annual practice objectives and to determine how these overall goals should be broken down among individual members of the team. Through a formal appraisal, these SMART objectives should be agreed with individuals and then the relevant reporting systems put in place, along with regular reviews, to monitor performance. Like anything new, it might be scary and it may take time and effort to set up, but once in place you will wonder how you ever managed any other way.
The British Dental Practice Managers Association (BDPMA) is growing quickly because it fulfils the needs of managers to become an organisation and if you haven’t mapped out what success looks like in terms of key business objectives then how can you possibly give direction to any member of your team?

No-one working in the practice should be undertaking any activity that does not support the achievement of the practice’s goals and the most fundamental role of any manager is to identify how the needs of managers to become an organisation and if you haven’t mapped out what success looks like in terms of key business objectives then how can you possibly give direction to any member of your team?

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