

## SEF National Business Aptitude Award Case Study

### Scenario:

A new graduate, Dr. Newbie, takes a job in a practice that is expanding from a one DVM to a two DVM practice. The practice was established by its current owner, Dr. Goodheart, 10 years ago, and he has had the same lead technician during this time. The lead technician, Ms. Aree, is in charge of personnel and is very knowledgeable when it comes to business and medicine. Dr. G gives Ms. A the responsibility of running the clinic and has complete trust in her. As Dr. N begins her career, Ms. A double checks everything she does and often tells her how certain cases should be treated stating, "This is how we do things around here." Often these "suggestions" are in direct contradiction to how Dr. N wants to proceed with the case. Also, Ms. A is not very well respected by the staff and they now have bonded with Dr. N, coming to her complaining about Ms. A.

### Opening Notes:

I would first like to thank those at Simmons & Associates for considering me for this award. I have learned that medical knowledge is only half of what you need in order to be a successful veterinarian. The other half of the picture is made up of personal and business skills that are crucial to becoming both successful and happy in life. I feel truly honored to have been recognized within my school for some of these skills, and enjoyed rising to the challenge of this case study. It forces veterinary students to recognize the real life situations that will be encountering in a few short months when entering the work place. Many new graduates have long term goals of practice ownership, but for most individuals the path to that goal will begin as an associate. When difficult situations arise amongst the team members in a practice, being an associate and not the owner limits your possible actions. For this case study I will outline my plan for how an associate should approach the problems within this practice.

## **Problem Diagnosis:**

1. Ms. Aree may feel that her position and duties are threatened by the arrival of a new doctor.
  - With the staff siding with the new associate, Ms. Aree may feel that her position at the clinic is jeopardized. She may be trying to compensate by being overly vocal about her opinions to ensure that the new associate is aware of Ms. Aree's roles around the clinic. She has been developing her own way of operating the clinic for the past ten years, and may have a difficult time with change.
2. The doctors are not practicing the same medicine.
  - One of the advantages of being in a multi doctor practice is that there are varying levels of experience and opinions. In difficult cases one doctor can easily consult with another. However, the staff gets caught in the middle when the doctors practice basic medicine differently.
3. All of the staff members are not on the same team.
  - When the new doctor arrived in the clinic, it allowed a division to occur, and the majority of the staff joined the new associate's team. As a new associate, it may seem great to be liked by so much of the staff. However, it is crucial that everyone in the clinic is on the same team, not just the majority.

The result of all these issues will be decreased efficiency and productivity of the clinic. It is important to approach these problems with an attitude that each staff member and doctor is part of the clinic team, and each person has something to contribute to the team.

## **Problem Solutions:**

Being a recent graduate, Dr. Newbie is just beginning to establish medical and clinical confidence. This confidence is currently being challenged in a disrespectful way from someone who should not be determining treatment plans. Being challenged by Ms. Aree is difficult for the new doctor because as a new addition to the team, Dr. Newbie wants to be accepted and treated with respect by the current staff. It appears that Ms. Aree is not liked by the majority of the staff, and this was most likely the situation before the new doctor arrived. The new associate should recognize that the owner may not have seen the problem, and should bring up the issues with Dr. Goodheart.

As an associate, Dr. Newbie should first sit down with the owner, Dr. Goodheart, and discuss the problems at hand. It would not be appropriate for the associate to try and intervene on this complex of a situation without being on the same page as the owner. Also, consulting with Dr. Goodheart about the issues will help him realize that Dr. Newbie is observant and truly cares about the happiness and efficiency of the team. The first step of this meeting should result in both doctors realizing and understanding the issues that need to be addressed. Then, together they outline a plan.

Problem 1: Due to there being multiple issues to address, a prioritized plan must be put into place in order to bring things back into alignment within the clinic. Even though all of the issues need to be addressed, certain ones hold higher priority and must be addressed first. Despite the current situation in the clinic, it appears that Ms. Aree is a valuable team player. She has been with the clinic for a long period of time, and it would be a shame to lose her. It is impossible to predict people's actions, and it is unknown how long Ms. Aree will continue being unhappy and working in an unfriendly environment before quitting. Therefore, quick action should be taken to try and maintain her as a team member.

## Agenda for Meeting between Doctors and Ms. Aree

- Inform her that the doctors have identified some issues that they plan to address within the clinic (Ms. Aree does not need to help figure out how to fix these issues. By simply acknowledging them to her will make her feel like a team player, and will hopefully reassure her that the environment within the clinic will be turning around in the near future.)
  - Issues:
    - Doctors are not practicing the same medicine
    - All of the staff is not on the same team
    - Concern over the clinic's efficiency and productivity
- Mention that she shouldn't have to feel threatened by a new associate coming into the clinic, and apologize if she has felt this way. Everyone has their set roles in the team, and it should not lead to a competitive or confrontational environment.
  - Review redefined job position descriptions for all positions within the clinic, including the doctors.
    - This will help to solidify in Ms. Aree's mind what her responsibilities and duties are. This will also identify the duties that are not within her job description, such as determining treatment plans which falls under the doctor's duties.
  - Re-emphasize her importance to the clinic, and what she has to offer. Mention her strengths and how she has helped the clinic become what it is today.
- Mention that the doctors understand it is difficult to undergo a change after doing things a particular way for 10 years. It is important to try and keep Ms. Aree open minded about what a new associate can bring to the clinic.
  - Dr. Newbie can learn from the way things have previously been done at the clinic.
  - There are many things for both Ms. Aree and Dr. Goodheart to learn from Dr. Newbie. Being a new graduate, Dr. Newbie will have experiences and new ideas that may help to improve the clinic.
- Allow her to express what she is feeling (being active listeners and not interrupting).
  - Ask her if she has any questions pertaining to what has been talked about or anything else.
  - Being part of the team for so long, she may have additional issues that may be hidden from the view of the doctors.

**Problem 1 Cont:** The two doctors should then have a follow up meeting to discuss the overall outcome of the meeting with Ms. Aree. Hopefully she was receptive to what the doctors had to say, feels less threatened and more on board with the plan to turn things around. However, if she is not willing to listen and is argumentative the entire time, it may not be possible to retain her as a part of the team. The experience she has is very valuable. In an office setting, technical skills can be taught a lot easier than communication and teamwork skills, and it may be necessary to find someone with a different skill set to fill her position.

**Problem 2:** It can be unhealthy for a clinic to have doctors with different opinions on how basic medicine should be practiced. The staff starts carrying out tasks in ways that are particular to each doctor, which eventually leads to frustrated staff members. These individuals are crucial to the success of the clinic, and it can be detrimental for them to be frustrated since they have a tremendous amount of direct communication with the clients.

It is the responsibility of the doctors to determine the medical protocols. The protocols should be printed so that all new doctors and staff members can be providing the same medicine. There is a possibility that the doctors may have different opinions on particular protocols. If this occurs then a clear explanation needs to be outlined for the staff of why there are a couple different medical opinions. Some of the protocols may include topics such as:

- Surgical protocols
  - Pre-surgery diagnostics
  - Anesthetic monitoring during surgical procedures
  - Post-operative pain management
- General Wellness
  - Puppy and kitten visits
  - Adult care
  - Geriatric care
  - Dental care
  - Weight loss program
- Treatment Protocols
  - Heartworm treatment
  - I-131 treatment for hyperthyroid cats
- Isolation for infectious diseases
- Boarding animals

**Problem 3:** The other issue that has to be addressed is getting the entire staff back on the same team. There is a division within the clinic now that Dr. Newbie has arrived. However, the staff had a lack of respect for Ms. Aree even before the new doctor joined the team. In a larger clinic the environment of a meeting may not feel intimate enough for people to open up. For those situations smaller group meetings would work, such as reception staff, surgery and laboratory technicians, and boarding/grooming staff. Since this is a smaller clinic, an open environment should be attainable with a meeting including the entire staff.

The meeting would be in the form of a workshop with the facilitator being a practice management consultant. To accomplish this, the clinic would be closed for the morning and provide a fun lunch afterwards. As a result, the benefit that would be gained by having a strong team would far outweigh the lost income during the meeting time. A healthy team of staff members will be more efficient and committed to their job, and will end up making more profit for the clinic in the long run.

## Agenda for Staff Workshop

- Lay out guidelines for meeting etiquette
  - Due to the current conflicts within the clinic, it is easy for people to not be active listeners and more focused on getting their own opinions vocalized. In order to have a successful meeting that encourages sharing of ideas, the staff members need to be open minded to the thoughts and feelings of others. No offensive or accusatory statements should be made.
- Mission statement
  - Re-evaluate the mission statement of the clinic. Allowing team members to give input on additions or changes will help them embrace the statement as part of their own, and will redirect the team in the same direction.
- Job satisfaction
  - Silently each staff member can brainstorm and prioritize a list of what they need from their job. Examples can be given, such as: job security, social interaction, financial, or career advancement. This will help them identify if they are being fulfilled by the current situation in the clinic. Then people can volunteer their ideas to the group to help the staff understand and identify with each other. The staff members hand in their responses so that after the meeting the owner, or an office manager, should have individual meetings with each individual to plan how to meet that employee's needs.
- Setting goals for the clinic
  - Aside from the routine daily responsibilities, various side tasks also need completing. The first major project for the clinic should be creating a hospital manual. Going forward, it is important to identify the way the clinic will be operated. Each person can help outline a part of a hospital manual. Ask for volunteers, they can work in teams, to take the task of a particular section. By volunteering the staff can identify with a particular section, and give back to the clinic based on their own skills and knowledge.
    - Example sections
      - Receptionist Manual
      - Technician Manual
      - Exam Room Assistant Manual
      - Laboratory Manual
      - Safety Manual
  - Once the sections are divided out, ask each individual or team what deadline they can complete the task by. It is important to allow them to set their own deadlines because it will be a self-set goal. Imposing a deadline mentally affects the staff member by increasing the demands placed upon them. Regular staff meetings will allow follow up with clinic projects. A reward can also be outlined in order to further motivate the staff. An example would be that if all sections are completed by the self-set deadlines, then the clinic will sponsor a catered lunch from any restaurant the staff chooses.
- Weekly team meetings
  - Inform all of the staff that there will be weekly meetings that will allow follow up with individual projects, and will also be a time to discuss new ideas or concerns. Continuing to strengthen the communication will help create a team approach to running the clinic.

**Conclusions:**

This clinic had staff members who disrespected their lead technician. Dr. Newbie entered the clinic with the desire to build confidence and establish a respectful relationship between the staff members. Instead, Dr. Newbie was faced with a challenging environment, and observed issues that had to be brought to the attention of the owner, Dr. Goodheart. Through open communication and active listening, hopefully the environment in the clinic will be turned around. Problems exist in the workplace. If this wasn't a fact then there would be no need for human resource managers or practice management consultants. In many practices the lead technician gets promoted to being an office manager, or is attempting to perform the responsibilities of both a technician and a manager at the same time. In some cases this may work, but for this clinic it may be recommended that an office manager is hired to take care of human resource responsibilities. A healthy and happy team leads to an efficient and successful clinic.