

Defining a Mission Statement and Setting Goals

When I began my career in dentistry twenty-five years ago, the "fee-for-service" practice was by far the most common approach for delivery of care. Time was not taken to define individuality and purpose, and outside factors such as insurance did not attempt to dictate the direction we took toward a treatment plan. Marketing was not mentioned and practice management as we know it was just beginning to surface. And yet, we were so busy on a daily basis, it was a relief when a patient missed an appointment.

The dental practice today is very different. Although they present a challenge, most of the many changes are very positive. With marketing and management skills, we have worked to balance service to the patient and maintenance of a well structured business in a world with myriad approaches to the delivery of care. Working with clients experiencing these changes, I have found that developing a mission statement and setting specific goals adds to this balance and therefore enhances the dental practice.

One of the greatest changes and challenges has been the transition of moving between the roles of technician, manager and entrepreneur. This is not to say that one is forfeited for the other, but it has been necessary for the dentist to build on his or her skills over the years to meet ever-changing consumer and business needs.

The role of the technician is one that most dentists expect and continue to be challenged by as they grow through the ongoing education available. The role of manager catches a few by surprise and yet they continue to recognize the importance of managerial skills for their practice. The third transition, however, has, in my opinion, gone unclarified. This is the role of entrepreneur. The management role has been so overwhelming that to include the entrepreneurial model seems an additional burden.

I have found, however, that when the dentist begins to take steps to learn about the entrepreneurial role and implement this visionary approach, management becomes easier. It is necessary for the practitioner to hold a vision and look toward the future. This is the big picture and, if balanced with a mission, will give the business a clear and concise declaration of the goals and values of the practice. The "Mission Statement," therefore, is the first step to identifying how you will uniquely and individually accomplish the values and beliefs of your philosophy. It is the first step to becoming an entrepreneur.

There appears to be some confusion as to what a mission statement is and how it makes a difference. As I travel across the country, I continually see mission statements beautifully framed in the reception area. Yet when I ask individuals to comment on the statement, they aren't even aware that it is on display. Dentists often send me the words as they have articulated them in private in their office, but when I arrive and observe the approach to the overall care of the patient, I do not see any evidence of implementation. This is disturbing to me, as I know the dentist believes in what is stated, but isn't sure how to communicate it and keep it alive.

It is important for the team to understand first, the purpose and benefits of writing a mission statement; second, how to begin the process; and third, how to begin executing it with further clarification.

Benefits

One of the major benefits of a mission statement is the exercise the team goes through in writing it. It forces everyone to clarify their values and beliefs and, through the discussion, learn about other team members. It is only when you understand your own values and the direction you are headed that you can begin to assist patients with values clarification. When I am working with a dental team, one of our goals is to continue to learn about individual patients and thereby meet their needs and expectations. We must first know who we are to accomplish this.

Another benefit from the mission statement is that it allows individuals on the team to act independently when faced with a problem or situation with a patient. If they understand their main objective or purpose, they may take a unique approach to solving the problem, but they stay focused on the main objective while doing so. This has been referred to as empowering the mindful and or self-management.

Having an established, understood mission statement assists the dentist by relieving him or her from making all of the decisions. Stephen Covey, author of "The Seven Habits of Highly Effective People" and "Principle-Centered Leadership" states, "When everyone is working from the same frame of reference, you don't need as much control." I believe this is certainly worth taking the time to develop: I see so many of my clients struggling with the time needed to manage. If their team members know what is expected and have agreed to the objective, time in management will be more productive.

Beginning the Process

To begin the process, the dentist must think about and define his or her philosophy. There are many different approaches to dentistry today, resulting in staff that have come to use with many different beliefs. It is the responsibility of the dentist to communicate his or her beliefs and values. It cannot be assumed that new employees will recognize the philosophy simply by spending time in the office. I have consulted in offices which a staff member has been with the practice for ten to fifteen years and has no clear understanding of the doctor's philosophy. This is especially true in a combined fee-for-service and PPO or capitation practice. Individuals on the team will share with me that they don't understand why patients are treated differently, especially when it comes to a diagnosis or when the patient is to return. When these feelings arise, it can create stress for everyone, including the dentist. There is an absence of harmony within the team.

In some cases, I have found that the dentist has difficulty in clarifying his or her philosophy; some are not even sure what they believe in. They almost feel it isn't something they have the luxury of deciding due to the many outside factors that have attempted to dictate what they should be doing. Practitioners today do have a choice, and if they can get back to their original beliefs and articulate them, they have accomplished the most important step to creating a practice that matches their vision.

Once the dentist has focused in on a vision of where the practice is going, and clarified a philosophy that can be discussed with the team, it is then appropriate to build on the philosophy with a mission statement. The philosophy is what you believe in, your mission statement is the teams' approach to getting there. Consider the following ideas in beginning this process:

- Brainstorm words that are meaningful to the team when thinking about their purpose in enhancing dental health. These words will later be incorporated in your statement.
- Discuss how each person on the team will execute the mission statement. Their roles are different, therefore they must know how it affects them.
- Discuss the team characteristics that you feel are necessary to carry out the mission statement: professionalism, integrity, responsibility, credibility, sincerity, etc.
- Take time to discuss the values and beliefs of individuals on the team; they will inevitably be the same values you will hold as a group.
- Be sure that the words in the statement hold meaning to you as a group. Don't just demonstrate values that you think will be impressive to others.
- State your purpose in doing your job.
- Finally, it is important to review your mission statement each year as a group. You may find that you will add, delete or simply change it because, as times change, your purpose will be effected.

Goal Setting

Goal setting is often thought of as a separate entity in a business. However, I would like you to think of it as an extension of your mission statement. Goal setting is further clarification for the team. Many practices do set goals, but one of the biggest problems I see is that after the goal is set, there is no specific direction given as to how to attain it. Dentists become discouraged, feeling they have done their part, and staff members are discouraged because they keep hearing hopeful ideas but aren't sure what to do differently to implement them. In addition, progress sometimes is not recognized. The team has reached a new goal, possible in production, and just as it is reached, the dentist is already moving on to a higher number. To do this without bringing the first endeavor to a point of closure is to risk a drop in morale.

When thinking about setting goals, first identify all areas requiring goals. It is very important to set goals relating to all the practice numbers. This takes into account production, collection, accounts receivable, overhead, etc. It is also important to set goals for all areas discussed in your philosophy. This might include service to the patients, your continuing care program, financial arrangements, internal marketing, comprehensive treatment planning, communication and so on. The list can seem endless, but I recommend taking segments of time during monthly meetings to discuss these areas in detail. Most offices can accomplish this within one year, if they have a one or two hour meeting each month.

When discussing numbers, you must first identify where you are now. Be sure all team members are part of this discussion. Then set realistic goals for the next 90 days. Follow-up discussions must occur each 30 days to monitor your progress. Hopefully, you will reach your new goal within the 90-day period; I highly recommend stabilizing the numbers for a least 90 more days before setting higher goals.

It is important to reach for a modest improvement. For example, if you want to increase production, discuss a \$5,000 a month increase only. In reference to decreasing accounts receivable, identify the amount you want to decrease by and divide it over a period of months to allow a portion of money to be collected over what you are producing each month. This does not put an unreasonable burden on the patient or the financial coordinator.

When developing other areas of goal setting, I recommend taking four steps with each area. First, discuss your objective, then the system, the communication and the follow-up.

For example, the objective for your continuing care program might be, in part, "To protect the investment a patient has made in their restorative dentistry." The system will state exactly how you go about this on a daily basis, such as making the patient's future appointment as they leave the office. The communication will be outlined for each staff member as they will play a role in supporting this system. Finally, the follow-up will be specific and will hold one team member accountable for results.

This discussion, on each aspect of the practice, can prove very valuable; not only does it clarify the subject at hand for the staff members responsible, but it gives the entire team an appreciation of what it takes to meet the ultimate objective. The dentist is the supporter in these discussions and must keep a clear perspective of the mission statement. At the conclusion of the discussion, the mission statement should be totally applicable.

Completing your mission statement and setting goals in a comprehensive manner takes time and dedication. The outcome, however, is one that will ensure reaching your vision and assisting those around you in reaching theirs.

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