

# PRACTICE PERFECT

HUMAN RESOURCES

## How to Build a More Productive Relationship With Your Practice Manager

BY CHRIS MCDONAGH, SENIOR EDITOR

**F**rom cordial to curt, from efficient to uncoordinated—the relationships that exist between physicians and practice managers vary widely, but they all have one thing in common: There is always room for improvement. What can you, the physician, do to effect that improvement?

In 17 years at Thomas Eye Group in Atlanta, Jeffrey A. Carlisle, MD, has observed the relationship between lead physician and practice manager from the perspective of an employee-physician, then as an owner-physician and, lately, as president. During that time, the practice manager was Walter Underwood, MBA, FACMPE, who recently chose to retire as the practice's chief executive and now works part-time as a practice management consultant for the Corcoran Consulting Group.

"When we began the search to replace Walt, which after 17 years was no easy task, we used two consultants," said Dr. Carlisle. "One to assist with screening and interviewing the candidates. The other to help us take a look at ourselves, in terms of identifying the core skill-set we desired and identifying the personality traits that would best complement our group."

**Do you help or hinder your manager?** In the experience of Dr. Carlisle and Mr. Underwood, there is a set of key issues and values—which can be loosely grouped under expectations, communication, trust and support—that can either be the foundation of a relationship's success or else set the stage for its failure.

### Expectations

It is hard for you and your manager to work in tandem unless the two of you share the same expectations.

**What do you want from a practice manager?** You should give this question a lot of thought because the answer will inform your approach in both hiring an appropriate manager and establishing the right relationship, said Mr. Underwood. Perhaps you hate dealing with HR-related issues; or you want to delegate more decisions so you can spend more time with patients. Perhaps you simply want to give somebody a to-do list each morning, in which case the job you're offering is more of a gofer than a manager. Whatever the reasons, identifying them and sharing them with your practice manager (or job applicant) are critical first steps.

**Define job roles and your practice's core traits.** What decisions will you allow your manager to make? What responsibilities and level of authority will he or she have? "Having

defined roles, written job descriptions and core practice traits—such as a mission, vision and values—are key elements of success," said Dr. Carlisle.

**Clarify practice goals and priorities.** You should be clear about your goals for the practice and make sure your manager agrees with them and will support them, said Mr. Underwood. If, for example, your goal is to double the size of the practice in the next two years, your manager might argue that this isn't feasible without additional staff and a marketing budget. "If you are unwilling to commit the resources to achieve your goal, you will both be frustrated with the results," he said. "It is best to have these discussions early on."

**Ask the manager to help write the job description.** You should write the

### Learn More in Chicago

Dr. Carlisle and Mr. Underwood will present a 60-minute session—Optimizing Physician-Administrator Relationships for Maximum Success—at this year's Joint Meeting (Sunday Oct. 17, from 3:15 to 4:15 p.m.). For an abstract, see the online Program Search, which will go live on June 1 at [www.aaopt.org/2010](http://www.aaopt.org/2010).



first draft of the job description, and you might ask a consultant to help you with that, or perhaps ask another practice to share the job description that they use. Next, ask your manager to review the job description and propose changes, said Mr. Underwood. “Most of the time, the revised document will be an improvement on your first draft. After all, your manager is a smart person who hopefully knows even more than you do about the business aspects of practice. Furthermore, by creating the job description together, you are creating and documenting a set of expectations about the job that you can both agree upon.”

**Review the manager’s performance regularly.** This shouldn’t be just an annual event. You should be giving a manager frequent feedback, particularly when he or she first starts.

### Communication

It is very important that you can be honest with one another, even when you disagree, said Dr. Carlisle.

**Meet regularly.** As the lead physician, you should schedule regular meetings with your practice manager, and these should be more than casual chats. “Set a structure for the meetings,” said Dr. Carlisle. “Identify key areas that will be updated and key activities that will be completed every time you meet. And make sure you schedule enough time to discuss any unexpected developments.”

**Send a follow-up e-mail.** When you and your manager have discussed an important issue, it is wise for one of you to follow up with an e-mail. This creates a written record of the discussion, and it also can elicit any afterthoughts. “Often I’m driving home and I think of some aspect of an issue that wasn’t covered in the meeting,” said Dr. Carlisle. “When I return to the office and see the follow-up e-mail, I have an opportunity to express my concern and put it in writing.”

**Become a skillful listener.** In leadership, the art of skillful listening is frequently more important than skillful speaking, said Dr. Carlisle.

**Know when to delay a discussion.**

A few careless words can cause a lot of harm. If somebody is “pushing your buttons,” it may be better to have a cooling-off period before responding. Hear them out, but then agree to set the discussion aside and continue it some other day, said Dr. Carlisle.

### Trust

“Trust is the foundation on which everything else is built,” said Dr. Carlisle.

**What is trust?** It encompasses more than the belief that your manager is honest. It also involves the belief that your manager not only has the *capability* of managing successfully, but—because of shared expectations about the practice’s priorities and values—he or she also has the *intention* of working toward the goals that you want to fulfill. “This trust allows you to focus on practicing medicine, without worrying what your practice manager is up to or whether he or she is up to the task,” said Dr. Carlisle.

**Allow your manager freedom to grow.** Unless all you want is a glorified gofer, don’t insist that the manager always needs your go-ahead before taking action. “If you let your manager make decisions and—for some things—take risks, he or she will really step up to the plate,” said Mr. Underwood. “Trust instills confidence and responsibility. Mistakes may get made, but your manager will learn from those mistakes and ultimately you will have a stronger manager.”

**Delegate authority.** If, for example, you want your manager to be responsible for meeting the budget, he or she must have the authority to control costs. Similarly, when it comes to expenditures, you need to give your manager realistic decision-making authority, said Mr. Underwood. “Initially, you might cap that authority at a lower dollar amount, and then increase that limit over time as you develop trust in his or her decision-making.”

**Don’t micromanage.** You may find it difficult to relinquish aspects of your managerial role, said Mr. Underwood. “But remember that many practices have lost great managers because the doctors didn’t let them do their job.”

**“Trust, but verify!”** Reassure your manager that there is no problem of mistrust, but insist that you still want to see the practice’s reports, said Mr. Underwood. If you relinquish all oversight of the practice to your manager, the results could be disastrous.

### Support

Consider time and money spent supporting your manager as an investment in your practice.

**Hire the best manager you can afford.** Recognize that A-managers will hire A-employees, but B- and C-managers would feel challenged by A-employees and can be expected to hire B- and C-employees, said Mr. Underwood. “Don’t be short-sighted and hire a B- or C-manager to save money. The B/C-grade you’ll get in your staff will end up costing you more.”

**Provide the necessary resources.** Make sure your manager has what he or she needs when it comes to resources such as staff, computers and, when needed, consultancy services. You should also provide funds for professional development to ensure that your manager grows with the practice.

**Support your manager’s authority (even when he or she is wrong).** If you air disagreements with your practice manager in public, staff will start to feel that they can get between the two of you, said Mr. Underwood. Instead, discuss it in private, figure out what needs to be done and let the manager go out and resolve it.

**Benefit from one another’s perspectives.** “When you’re focused as a doctor on seeing patients, you can’t know everything that is going on at the front desk or elsewhere in your practice. You have to trust your manager to be your eyes and ears out there,” said Mr. Underwood. Similarly, your physician’s perspective will give you insights that you should share with the manager. You may, for instance, anticipate that a proposed change in policy will be a hot-button issue for one of your colleagues. Supporting one another in this way is partly a matter of being considerate, said Dr. Carlisle, “but it is also good business.”