

## IN THIS ISSUE

**FEATURE: THE END OF THE DREADED YEARLY PERFORMANCE REVIEW, PT. 2**

**ASK THE CONSULTANT: BILL 2 SURFACE FILLING**

**SERVICE SAVVY: MAKE YOUR TROJAN UPDATES A ROUTINE**

## The End of the Dreaded Yearly Performance Review, pt. 2 Proactively Managing Performance with Goal Setting

by *Rebecca Boartfield*

Did you read our last article titled The End of the Dreaded Yearly Performance Review (Part 1)? Did it make you feel good and nervous all at once? The article indicated you might be able to give up your current performance evaluation system (that's the feel-good part) and then put goal setting at the forefront of your performance management going forward (that's the nervous part). While the shift to focusing on goals may seem daunting, it is worth it and easier than you may think.

Managing performance with goal setting can be, at first, challenging. Why? Because it is not a one-size-fits-all approach. Unlike standard performance evaluation forms, nobody can give you the goals for your employees. Only you (or the employee) can, and you know what you need from your employees to support your success.



That being said, it will get easier and this article will shed some light on the goal setting process and get you going in the right direction.



### Why Goals?

The simple answer is: employee engagement. You can't be a manager of a business and not be concerned about employee engagement. In your business, it's likely you see a mix of employee engagement occurring regularly— some are engaged, some aren't, and some are in between. Isn't it likely true that an improvement in engagement would mean an improvement across the board? Employees motivated to make your

business, their positions, better, will positively impact things like customer service, productivity, and morale.

In groundbreaking research, the Gallup group created the Q12 Survey. Gallup “conducted decades of research - writing, testing, and refining thousands of question items to find the ones that would best measure employee engagement. In 1996, Gallup finalized the 12 question items that consistently and powerfully link to business outcomes, including profitability, employee retention, productivity, safety records, and customer engagement.” Among these 12 core elements are:

- ▶ I know what is expected of me at work.
- ▶ There is someone at work who encourages my development.
- ▶ In the last six months, someone at work has talked to me about my progress.

(CONTINUED ON PAGE 3)



Goals, among other methods of communication about expectations, can be a significant source for creating these experiences for employees, thereby enhancing engagement.

### **Creating goals**

As the manager/owner/employer, creating goals begins with you. You must know where you want your business to go in order to determine the best way to get there. Therefore, you need to carefully analyze your business to determine what needs to be improved.

Once that's accomplished, you have to tie your overall business goals to your individual employee goals, at each level of the organization. This is commonly referred to as "cascading goals" – a process that integrates goal-setting activities at all



organizational levels, pointing to the goals outlined at the highest level. As goals cascade downward, they become more narrowly focused allowing for specific objectives to be defined.

You want everyone, in their own way, working towards the achievement of the goals you established at the executive level. For example, if your goal is to increase business by 10%, what does each employee need to do, or achieve, in order to help you accomplish your goal?

(CONTINUED ON PAGE 5)

# Ask the Consultant

Answer by Dayna Johnson



**Q:** How do you bill a two surface (D2392) filling that does not involve the Occlusal or Incisal surface? We had billed a single surface (D2391) B and then an additional single surface D filling on the same tooth that was down-graded to a BD but paid as a single surface (D2391). We are Premier Providers for Delta Dental only, this is what their note indicates: "Multi-surface restorations not involving the Occlusal/incisal surface, are considered single surface restorations"

**A:** If two or more restorations are performed on the same tooth, on the same day report the restorations separately which is what you did. Unfortunately, some insurance carriers, may restrict coverage for more than one restoration on the same surface on the same day.

"Classic" Trojan Today articles, coming soon to  
[trojanonline.com](http://trojanonline.com)

6/15/24

*Employee Performance Review Preparation*

*by Shurli Wilkinson*

6/25/24

*Lessons From Moving*

*by Ingrid Kidd Goldfarb*



Things to keep in mind:

- ▶ The employee needs to be able to do the work; people can't achieve a goal that is not within their scope of influence or current capability.
- ▶ The employee must have the tools, resources, and access required to get the work done.
- ▶ Expectations must be well-defined, and the employee must have sufficient time and bandwidth to meet milestones.
- ▶ Goals must be reasonable. The challenge of a stretch goal can be invigorating; an impossible target will certainly be frustrating and can be demoralizing.
- ▶ Managers must be prepared to offer guidance and coaching.

### Writing Goals

Writing goals can be critical to whether or not they will be achieved. A misunderstood goal will be ineffectual; an overly ambitious goal will hinder motivation. It's important that the goals be S.M.A.R.T. – an acronym you've probably heard before, but it's worth discussing again. S.M.A.R.T. stands for Specific, Measurable, Attainable, Relevant, and Time Bound.

- ▶ **Specific:** Exact, accurate, clear, unambiguous, and without the use of generalities. You must specifically define what you expect the employee to do. Use action verbs when possible. You should take into consideration the employee's personality and experience level. For example, a highly autonomous and more experienced employee will likely need fewer details than a less confident or seasoned employee.
- ▶ **Measurable:** You will need to identify how success will be measured. What is the concrete criterion? This is usually stated in terms of quantity, quality, timeliness, or cost. This is how you will be able to objectively assess whether or not the employee is achieving the goals established. For example, a goal could be for the employee to increase productions by 25%

(CONTINUED ON PAGE 6)

- ▶▶ **Attainable:** Is the goal within the employee's capabilities? Is the goal part of the employee's overall authority? Goals need to be realistic – not out of reach and not extreme. If you can't answer this question: "How can the goal be accomplished?" the employee won't be able to either. Ensure that the employee has the resources and time, as well as access to necessary information (i.e. data, people) in order to be successful at reaching the goal.
- ▶▶ **Relevant:** The goals should matter to the employee and align with goals for the team, department/division, and organization. In doing so, be sure the employee understands how his/her individual goals contribute to the success and/or failure of the goals at higher levels. In this sense, you are giving the employee context for the work they do.
- ▶▶ **Time Bound:** Specify a delivery date and/or schedule. When does the goal need to be completed? For example, "by the end of the 4th quarter of this year" or "every month." Goals should be grounded in specific time frame or target date. This helps create a sense of urgency and can prevent day-to-day activities from getting in the way unnecessarily.

(CONTINUED ON PAGE 7)

### Check out these online courses and training opportunities:

<https://www.dentalpracticecareers.com/dental-insurance>

<https://dentalpracticeenhancement.com/practice-and-team-empowerment-through-training/>

<https://www.dentalpracticecareers.com/>

### “ QUOTE-WORTHY

Always treat your employees exactly as you want them to treat your best customers.

-Stephen Covey

”



Getting comfortable with establishing goals in this way will take some practice. For simplification, think of the aim of S.M.A.R.T. goals as specifying who, what, where, when, and why of the goal and creating shared understanding and expectations. Ultimately, the purpose is to help the employee, the team, the department, and the organization succeed.



Pitfalls to avoid:

- ▶▶ Consider the employee's total set of goals. While each individual goal may be achievable, you may be assigning the employee more goals than they could reasonably be expected to successfully complete. Generally, 3-5 should suffice.
- ▶▶ Don't create a situation in which safety, ethics, or morals will need to be compromised in order to achieve the goal. Be sure employees know you don't want short cuts (cheating), which can be dangerous, to become the manner in which a goal is accomplished.
- ▶▶ Don't create goals that are so narrowly defined that employees miss the bigger picture. You don't want employees to focus myopically on short-term gains and lose sight of the long-term effects on the organization.
- ▶▶ While goals should be time-bound, don't make the timeline inappropriately short. Too short of a timeframe can result in long-term problems - short-term goals encourage short-term thinking.
- ▶▶ Think about whether or not the goal will influence risk-taking. Define acceptable levels of risk. You don't want your employees to take too much risk and put the organization in any kind of harm.

(CONTINUED ON PAGE 8)

## Conclusion

The process of creating and writing goals as a means of increasing performance management is a shift worth making. Yet, poorly written goals will not help your organization or employees get better, they will hinder total performance on all levels, not to mention be potentially damaging along the way. Start slow in this process, maybe write one to start, and see how that goes. Get feedback from your employees, learn from mistakes, and further enhance your process before going too far.

Once you're on your way with that part of goal setting, you can work on monitoring and feedback. Goals will not be successful without it. That's Part 3 of our series – stay tuned!

*Rebecca Boartfield is a Human Resources and Employment Compliance Consultant with Bent Ericksen & Associates, a national Human Resources and Employment Compliance Consulting firm.*

FMI: [rebecca@bentericksen.com](mailto:rebecca@bentericksen.com) or [www.bentericksen.com](http://www.bentericksen.com)

**[Trojan Today | Rebecca Boartfield | The End of the Dreaded Yearly Performance Review Pt 1 \(trojanonline.com\)](#)**

**[Trojan Today: "The Value of Job Descriptions" by Rebecca Boartfield | Trojan Professional Services \(trojanonline.com\)](#)**



Share your Trojan Today with members of your office. Anyone can subscribe.

**SIGN UP**



*Trojan Today provides a forum for industry professionals to offer diverse information and provide ideas and suggestions in dental practice management. These articles are meant to be information and do not necessarily represent the opinions of Trojan Professional Services, Inc.*



To ensure you have the latest plan research, update at least once a week. Frequent updates keep the update process as quick as possible.

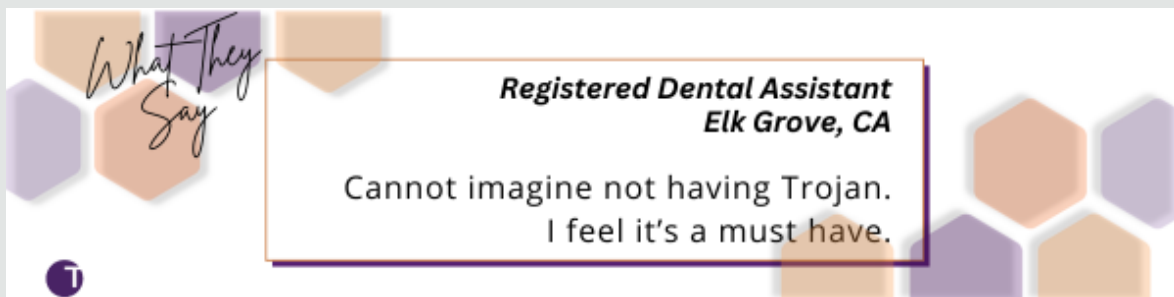
We have a few suggestions to help you remember to *download* and *process* your updates.



1. Make sure the Trojan Communicator is always running. It can be set to remind you each week to run an update.
2. Assign a particular employee to perform the task on a weekly basis.
3. Use tools like Microsoft's Post-it Notes on your desktop to set a reminder.
4. Add updating Trojan to the checklist for another routine or office procedure.
5. Do you have a morning huddle? Run the update while you talk.
6. Do you have time set aside to catch up on messages? Run the update during this time.

Make frequent updates part of your routine. Remember, the more often you update, the less time it will take.

If you have any questions or need assistance with the updates, please feel free to contact our Software Support Department at **800-451-9723 ext. 1**



**TROJAN PROFESSIONAL SERVICES**

Accelerating dental practices to excellence  
by providing services that increase case  
acceptance, production,  
collections, and profit.

**TROJAN TODAY** PHONE: 1-800-451-9723 • E-MAIL: [nikkim@trojanonline.com](mailto:nikkim@trojanonline.com) • [www.trojanonline.com](http://www.trojanonline.com) • Published monthly by Trojan Professional Services, Inc., P.O. Box 1270, Los Alamitos, CA 90720 and distributed to members of the dental profession. Statements of opinion in TROJAN TODAY do not necessarily reflect the opinions of Trojan Professional Services, Inc. or the Editor. Neither Trojan Professional Services, Inc., Trojan Today, its Editor or staff assume any liability in connection with the use or implementation of any policies or procedures discussed in this newsletter. Trojan Today is distributed as a newsletter and with the understanding that neither the publisher, the Editor or the staff is rendering professional or legal services of any kind. If legal or professional advice of any other kind is required in connection with topics discussed in this newsletter, competent advice should be sought.

• PRESIDENT: Ingrid Kidd Goldfarb • EDITOR: Nikki Myers •

Copyright ©2021, Trojan Professional Services, Inc. All rights reserved.

No part of this publication may be reproduced or transmitted in any form without permission.