

DELEGATING CAN IMPROVE BUSINESS OPERATIONS

September 2022

Last month's newsletter discussed putting a practice manager in place. This month, we're discussing delegation. What if it isn't the time for a practice manager? What if the practice manager is overloaded? Although these two questions seem to be worlds apart, the solution is the same – delegate.

What if it isn't the right time for a practice manager, but the practice owner has too much on their plate? Delegate some duties. What if the practice manager has too many tasks to handle and risks dropping the ball? Delegate some duties. Delegating doesn't signal failure; it signals strategic decision-making. As Jessica Jackley, CEO and co-founder at ProFounder, said, "As all entrepreneurs know, you live and die by your ability to prioritize. You must focus on the most important, mission-critical tasks each day and night, and then share, delegate, delay or skip the rest." Delegating specific tasks is a strategic decision to ensure the business's operational success.

Delegation is not a way to "let you off the hook" for a responsibility, nor is it a complete abdication of control. It also does not mean doling out tasks you don't like to others. Delegation is a leadership skill, and it involves a calculated, strategic move to assign tasks to those more skilled in the task or those with a desire to develop and improve a different skill set. As the leader who is delegating, you now have a new responsibility - directing and coaching. You will guide the person in analyzing, designing, developing, implementing, and evaluating their process to achieve the desired outcome. As the person moves forward in the role, your level of coaching/leadership will change from one where you have a high level of involvement to one that only needs minimal involvement (aka, successful delegation).

Whether you are the practice owner or the practice manager, the need to delegate will occur throughout business operations. Sometimes, it may be a short-term project or a specific task; other times, it's a full-fledged leadership role. For example, the practice manager handles client accounts receivables. Is A/R a mission-critical task that only the practice manager can perform? In many situations, that task can be delegated to someone else to allow the practice manager to focus on higher-value tasks such as tracking KPIs or training team members. Perhaps the business is growing, and the practice owner no longer has time to properly oversee the training and performance of the technician team. A lead tech/nurse may be just what the doctor orders to keep business operations efficient and productive. Are you starting to look at your "to-do" list differently?

The following is a list of potential areas you might delegate to others:

- Accounts receivables
- Inventory
- Social media
- OSHA / Safety oversight
- IT support
- Laboratory
- Liaison for outside specialists
- Outpatient flow
- Hospitalized patient care
- Bookkeeping
- Onboarding and training
- Pet wearable data processing
- Lead tech/nurse, CSR, or kennel
- Advocate (such as Fear Free or Cat Friendly)

With this many areas (and more!) that need attention, a single person (practice owner or practice manager) may need a support team to keep things efficient, productive, and profitable. Now, for the "Yeah, but...."

Sure, it's helpful to delegate, but how is performance managed? You need a protocol or process, such as a checklist or job description that outlines expectations. Absent a process, the person taking on the task is at risk of failing. Let's say the A/R person is responsible for sending monthly invoices to clients. When do they turn over an account to a collection service? What is the timeline for taking different actions on a past-due account? Do they merely mail out bills, or do they have the knowledge and authority to work with clients to make payment arrangements? Details matter.

Without details, the scope of the job is unclear. Here's another example: a person was assigned to perform inventory cycle counts and fix computer discrepancies. While it may appear that the process of what to count and when is straightforward at first, the rest of the job responsibility is not. Long story short – because the person only focused on counting and correcting numbers, they didn't notice that theft was occurring. The key to delegating is to start with the end goal in mind and get all the ducks (aka duties) in a row. In this situation, simply counting was not the end goal. Monitoring use, ensuring correct data entry for invoicing purchases, and evaluating discrepancies were also duties.

Looking over the above list, most can be a specific title with a job description including duties to maintain, rectify, work with, oversee, conduct, provide, etc. For example, a laboratory coordinator performs routine maintenance on the equipment and maintains appropriate lab supplies. A Fear Free Advocate coordinates certification processes for the team and trains the team on new techniques. Refer to a list of action verbs to help create appropriate duties. Avoid acronyms and clichés, as not everyone understands industry acronyms, and clichés can be vague or misunderstood.

In addition to duties, the job description should specify the number of hours allocated for the role. An inventory coordinator may need 10 hours a week, while the A/R coordinator may get a few hours at the end of the month. The outside specialist liaison may need an hour every day to review communications with referral specialists, while the onboarding and training coordinator is on an as-needed basis. Consider if any of these roles are eligible for remote work, especially considering the problems created by interruptions during the workday.

One of the biggest issues facing anyone in the hospital is the high probability of interruptions. For someone such as the inventory coordinator, with only a set number of hours to complete their task, being pulled into an exam room or asked to restrain a patient on the treatment table can be disastrous for efficiency and accuracy. For some roles, working when the office is closed is beneficial (e.g., inventory cycle counts, payroll processing, equipment maintenance), while other duties are ripe for remote work with proper and secure connections (placing orders, payroll processing, following up on client or specialist communications). Consider the "benefits" when some of the work can be performed at home – good for attracting and retaining team members and reducing the threat of disruptions.

Finally, address compensation. How do you pay someone who has agreed to take on an additional role? Is working remotely enough? Should they receive an hourly increase or a monthly bonus? Should compensation be based on specific performance metrics? What happens if they decide to quit the role but continue as a tech/nurse or CSR?

First, do the math and make sure you can afford to compensate for the additional duties. Next, discuss wages with your accountant or consultant, and map out a plan for the growth of the business and expansion of roles for the team. Make time every year to:

- Review and update the organizational chart
- Identify high-value and low-value tasks, delegating where appropriate
- Have job descriptions even for delegated roles
- Update compensation plans

Delegating is a way to "stretch" a team member, helping them to develop leadership skills and play a more significant role in business operations. Additionally, it allows the practice owner to create a "pipeline" for future managers, especially if you follow the advice of former president Ronald Reagan who said, "Surround yourself with the best people you can find, delegate authority, and don't interfere as long as the policy you've decided upon is being carried out." The statement contains a critical clue - "as long as the policy you've decided upon." Be strategic before you delegate and reap the rewards of efficiency, productivity, and a healthier work-life balance.