



Mary H. Osborne, Resources

## PRACTICE RENEWAL

A Leadership Guide for Dentists

### Values, Vision, Vitality

There has been so much written about values and vision that sometimes it seems as though there can't be much more to say. However, when I look at the problems and concerns troubling dental practices around the country, I see that the key to their resolution can only come from an increased clarity about the practice's values and vision.

When the vision gets murky, problems seem insurmountable. When it is clear, everything seems simpler. It's not that problems don't come up when you have a clear vision, but that when they do, there is an ease, and a liveliness, about the process of working through them.

Most practices I work with have a vision, but there is often a "disconnect" or break between what the vision *says*, and what the vision *does*. Sometimes the vision seems clear to the dentist, but the team doesn't see how to consistently put it into practice. Sometimes the vision seems to change, and there is confusion about the direction of the practice. Often the vision is seen as a distant dream, rather than something that supports decision-making on an operational level.

Ideally, the vision is what gives life to the practice! Aristotle said, "A vivid imagination compels the whole body to obey it." If values are the molecules making up the organism that is your practice, the vision

is the air it breathes that gives it vitality. How lively is your vision? How does it live in your day-to-day decisions? I'd like to introduce you to a way of using your values and vision to set standards for how you develop your practice, how you work together, how you practice clinically, and how you relate to your patients.

### What Gives Your Practice Vitality?

Most organizations tend to operate out of a problem-solving model. This model starts by:

1. Identifying a problem.
2. Analyzing its causes and analyzing possible solutions.
3. Making an action plan.

But there is another method of developing an organization that does not begin with identifying what's wrong or what is lacking. This is known as *Appreciative Inquiry*, or AI. The Appreciative Inquiry model begins by:

1. Appreciating and valuing the best of what is.
2. Envisioning what might be.
3. Creating a dialogue about what should be.

Rather than asking what the problem is,

# PRACTICE RENEWAL



AI begins by asking what gives life to an organization.

The problem-solving model asks people to look backward, and rarely results in new vision. AI teaches that the “seeds of change are implicit in the very first questions we ask,” and that “human systems move toward what they persistently ask questions about.” *Instead of starting with what you do not want, it asks that you clearly identify what you do want.* But AI is not a process of unrealistic daydreaming about possibilities. It is based on the best of what already exists in an organization.

## Values Clarification

Inquiring about what gives life to your practice is a values clarification exercise. For example, if you begin by asking each person on the team to describe a high point experience in your practice, a time when he/she felt most alive and engaged, you will hear values. When you ask people to talk about what it was about an experience they most valued, you will hear then relate what is important to them in the context of their work.

Ask other team members to point out the values they hear in each story. As you identify individual values, you will create an understanding of the shared values of the group. The process is concrete, based on real situations, not theoretical. An added benefit of the process is that, through the stories everyone tells, you will build pride in

yourselves and in your practice. Those stories have power in them.

## Listening for Values

Write down the values you hear. Some examples may include:

- ♦ **Excellence:** When you hear pride in a successful case you did.
- ♦ **Integrity:** Because you stood behind your work when it wasn't as successful as you would have liked.
- ♦ **Appreciation:** When a patient cried tears of joy over his new smile.
- ♦ **Empowerment:** When a team member felt trusted to try something new.

As you work through the process, you will develop a list of values that have a specific meaning in the context of your stories, but that can also be applied in other situations. For instance, if we value appreciation from our patients, how does that apply to our interactions with each other? If we value empowerment in our work, how does that apply to empowering patients?

Asking practices to spend time on values clarification can be like pulling teeth. “We’ve done that before!” “We have other more important issues to spend our time on!” Talking about values seems too philosophical or too impractical for some people. But there is nothing more practical than values clarification. A value not put into action is not a value: by definition values must be

Mary H. Osborne’s *Practice Renewal* is published by Mary H. Osborne, *Resources*. This leadership guide is designed to challenge, inspire, and support dentists and their teams.

Mary H. Osborne, *Resources*.

Phone: (206) 937-5851 •

E-mail: [mary@maryosborne.com](mailto:mary@maryosborne.com)

Website: [www.maryosborne.com](http://www.maryosborne.com)

Address: 1564 Alki Avenue SW, Suite 303 • Seattle, WA 98116

© 2001, 2008 Mary H. Osborne, *Resources*. Please share what wisdom you gain with others. Attribution is appreciated.

# PRACTICE RENEWAL

exercised to be authentic. Unless the values of your practice are discussed in light of concrete issues, they have no life. They have no ability to influence your choices and shape your vision.

Values clarification is always a work in progress. It requires both dialogue and action. The purpose is to work the values, not put them on the wall in a frame. As you work your values over time they will be challenged. You will sometimes find your values are in conflict with each other, and you will have difficult choices to make. In order to be influenced by your values, you must put them to the test, over and over again. Only as you work the values can you really come to understand the fullness of the specific meaning they have *for you*.

## Shared Purpose

As you understand your shared values, you become clearer about your shared purpose. In order to work effectively together, it is important to understand *what you want from* your work and *what you want to accomplish in* your work. The more your shared purpose is framed in a positive context, the more power it has. For example, if you say that you want to lower stress in your practice, that is not as powerful as identifying that you want to have an environment in which communication flows easily from one person to another. The more clearly you can describe what that flow of communication looks like when it is working well, the better able you will be to create more of that in your practice.

When I am invited to visit practices and observe them as they work with patients, I do not observe from a critical perspective. Rather, my goal is to understand what they are doing that has contributed to their current level of success, so I can help them see opportunities for using their strengths in other ways. The gifts and talents of each team are unique, as are their values and their shared purposes. All of these attributes combine to define success for a given practice.

## Four Cornerstones of Success

There are four cornerstones that form the foundation for success in dentistry. Each practice will define success differently, and the standards you choose to set in each of these components make your practice distinctive. I will list them in a linear fashion, but they are not in order of importance. *Each one is essential*. They are dynamic in their interaction with each other. When any one of them is weak, the practice is out of balance. The four cornerstones are Clinical Services, Patient Care, Team Participation, and Practice Growth and Development.

- ♦ **Clinical Services:** Every practice is unique in the services you provide and the way in which you provide them. Only you can set the standards of care in your practice. You must decide what services you will offer and the standards to which you will hold yourselves accountable. One of the greatest gifts of dentistry is the opportunity you have to set standards of excellence and to declare your commitment to those standards.
- ♦ **Patient Care:** You have the opportunity to decide the way you will care for people. You can aspire to the highest standards of education, empowerment, and partnership with those you serve. You can offer your patients the opportunity to aspire to the highest levels of health. You can determine the level of trust you want to share with your patients and create relationships worthy of that trust.
- ♦ **Team Participation:** Unless a dentist has no employees, all practices have team participation. The individuals in each practice determine the level and quality of that participation. You can choose to surround yourselves with people who have passion and a strong desire to influence the direction of the practice. You can set a standard for working together that involves a healthy exchange of ideas and insights, and allows for differences

# PRACTICE RENEWAL



of opinion within a context of shared values. You can share risks, rewards, responsibility, and pride in working together for a shared purpose.

- ◆ **Practice Growth & Development:** Only you can set the standard for growth in your practice. You can choose financial goals, how large you want your patient base to be, how large a team to have, and the days and hours you will work. You can also decide on personal and professional growth opportunities for the dentist and the rest of the team. You can choose what you want and what price you are willing to pay for it. Comparisons with other practices are not useful because you can never know the price they are paying for what they have. You can only know the return you desire on the investment you make in your practice.

Notice that the first two components described have an external focus — your patients as a whole. How you are seen in the community, or your reputation, come out of these elements. The second two have an internal focus — you and your team. They shape the quality of life to which you aspire, or your internal direction. But they are clearly all interrelated. Choices you make about any one of them affect all the others.

These four cornerstones are the foundation on which your vision must be built. You can use them to identify:

- ◆ **Current Reality:** Where you are now.
- ◆ **Vision for the Future:** Where you are going.
- ◆ **Action Plan:** Systems that support your vision.

## Current Reality

If someone asked you today what your practice stands for in each of the four cornerstones we've identified, what would you say? Declaring what you stand for goes beyond what you believe or what you'd like. It's a strong statement that indicates accountability. From a perspective of Appreciative Inquiry, ask yourselves what your

current standards are. What is the current reality?

## Current Reality Exercise

- ◆ **Clinical Services:**
  - What can you say about the current level of the clinical services in your practice?
  - Of which services are you most proud?
  - What aspects of treatment represent your greatest skill?
  - What can you say about your diagnostic skills, your treatment planning skills, your technical delivery skills?
  - What are the current standards in your practice for the skills of non-dentist clinicians?
  - What does your practice stand for in regard to clinical services?
- ◆ **Patient Care:**
  - What can you say about your patient care?
  - What kind of relationships have you built and are you building?
  - How do you help your patients learn about their health?
  - How do you involve them in decision-making?
  - How do you challenge them to aspire to higher levels of health?
  - What does your practice stand for in regard to patient care?
- ◆ **Team Participation:**
  - What can you say about the current level of team participation in your practice?
  - What do you do to create a safe environment?
  - What systems do you have in place to support open and honest communication?
  - How do you involve team members in decision-making?
  - How do you help them understand their role and the part they play in the integrity of the whole practice?
  - How do you help them grow in understanding the business of dentistry?
  - What does your practice stand for in regard to *team*?

# PRACTICE RENEWAL

## ♦ *Growth & Development:*

- What can you say about your practice in regard to growth and development?
- What do you do to develop your practice in the direction you want it to grow?
- What practice goals have you identified?
- How do you measure your progress?
- How do you support personal and professional growth?
- How do you share the risks and rewards of ownership?
- What does your practice stand for in regard to growth?

## *Vision*

Once you have a vivid picture of where you are, you can focus on where you want to be. Sometimes when I hear dental teams discuss their vision, they seem to me to see it as a fixed point. They often paint some Utopian or unattainable picture of a perfect practice. I'd like to suggest a developmental model of vision.

In this model the vision flows from the individual and his or her shared values. It builds on your shared purpose, and the reality of where you are now. Ideally, it has life, and it gives life to your practice. If it has life, it must grow and evolve over time. The core values from which it flows remain the same, but your knowledge and your perspective influence the vision itself, and both change over time. Knowledge refers to what you understand to be true, in perspective to what you can "see."

I had an experience on vacation years ago that made me think about vision. We live in Seattle where we treasure our view of the Sound and the mountains. But over the Fourth of July weekend, we spent some time at Lake Chelan in Eastern Washington. We took a drive from there about thirty miles up into the forest on a winding dirt road to an old fire watchtower. The view from the top was well worth the ride. We could see for miles in every direction. The lake is fifty-five

miles long, and we could almost see to the end of it. We looked across at Pinnacle Peak. Off in the other direction, beyond the trees and the mountains, we could see acres and acres of farmland characteristic of the eastern part of the state. It was an incredible view.

A family who also lived in the western part of the state and had driven over the pass for the weekend arrived at the top just before we did. The oldest boy, age eight, stood beside us as we took in the view. With great authority, he pointed out to the farmland and said, "See that flat area over there? I'm thinking that's Nebraska."

My husband and I smiled at his geographical miscalculation. We knew that we could see a great distance but certainly not all the way to Nebraska. We realized that when you're eight years old and learn that Nebraska has flat land, it's easy to assume that the flat land you see off in the distance is Nebraska.

We all have limited views of the world. All vision is limited by what we know and what we can "see" at any given time. The vision for your dental practice will also change over time. Sometimes it will change dramatically, based on new information. Sometimes the change is more subtle, a deepening of your understanding of what is important to you or what is possible for your patients. As your perspective and your knowledge change, your vision changes. It can become clearer, broader, deeper, and more vibrant.

## *A Developmental Model*

When you graduate from dental school, your vision might be a practice in which you do good dentistry, make a comfortable living, enjoy your work, and treat people with respect. But as you practice and experience more with patients and team members, the vision is likely to change. As your knowledge and your perspective change, the vision will become more clearly defined, and some aspects of your practice that fit with the old vision will not fit with the new.



# PRACTICE RENEWAL



Your early vision is likely to be like the sketches an artist draws before doing a self-portrait, a likeness of the painting she will create, but not very detailed. As your knowledge grows and your perspective of what is possible is enhanced, the lines are drawn more clearly and the colors emerge. As you grow in understanding of yourself, the character emerges and becomes central to the purpose of the piece.

A vision is different from goals in that it is not quantifiable. It refers to a quality of life, rather than quantity. To have power it must transcend goals, and it must have a compelling purpose beyond financial reward. It involves others: what you want to provide for them, as well as what it will provide for you. A vision is not a strategy. It is not a means to an end. A changing vision does not have to do with identifying and targeting the next challenge or learning a new technique. *Vision has more to do with how you approach your work than how you do your work.*

## The Role of Leader

The leader's role in shaping the vision for a dental practice also changes over time. The dentist as leader fulfills the following roles:

- ◆ **Initiator of the Vision:** Only the dentist, owner of a practice, can shape the initial vision based on his or her personal and professional values. In the early years of a practice, the dentist engages in a process of learning, experiencing, and leading the charge toward the future direction of the practice.
- ◆ **Educator:** At some point, the dentist must become an educator, helping others learn the purpose and meaning of the vision as well as examples of the vision in action. He or she must develop the skills to articulate the vision in a way that allows team members and patients to understand it and identify with it.
- ◆ **Facilitator:** Eventually, the leader becomes a facilitator for the vision, shepherding it through challenges and conflicts. The dentist develops a team of people who share the core

values. Through team-building and hiring people with congruent values, the dentist can surround himself or herself with people who contribute to the emerging vision. They can be invited to add their own values to the mix, which may take the vision beyond what the dentist could have imagined alone.

- ◆ **Mentor:** Finally, the dentist can become a mentor, so that the vision will live beyond his or her leadership. The most powerful vision is one that is fueled by a philosophy rather than a personality. One of the most difficult phases of leadership is the one in which the dentist creates a legacy which allows the vision to live beyond the visionary. Another leader, or leaders, will see farther, know more, and continue to grow the vision, based on the principles developed through the original vision. The role of the mentor is to help the new dentist clarify values and hold the possibility of the new vision.

## Vision Exercise

Wherever you are in your process, you can use the four building blocks we identified earlier to shape the next phase of your vision. Do the following exercise on your own, with your team, or with a person you are mentoring. First, choose a time frame that is appropriate for your practice: it may be one year, five years, ten, or twenty years. Then, fast forward to the date you have selected in the future and respond to the list of questions, as if you are at that future date. Answer the questions in this exercise in the framework of future rather than current reality. Ask yourself how you would like to be able to respond.

For example, "It is five years from now, and I am \_\_\_\_ years old, and this is what I can say with great confidence and pride about our practice . . ." Picture yourselves five years older and answer the following questions as you would like to be able to answer them. Be specific. Write down your answers.

- ◆ **Clinical Services:**
  - What are the standards of care in your

# PRACTICE RENEWAL

practice for clinical services?

- What does your practice stand for in regard to how you do your work?
- What can you deliver consistently and with predictability in every phase of treatment by every practitioner?

## ♦ **Patient Care:**

- What is the standard for patient care to which you hold yourselves accountable?
- What does your practice stand for in regard to how you relate to patients?
- What do you expect of yourselves in regard to health education and facilitation?
- How high is the level of trust between you and your patients?
- How consistently do patients choose your best and finest care?
- How well do they learn to care for their mouths?

## ♦ **Team Participation:**

- What is the level of team participation?
- What are the standards to which you hold yourselves for how you work together?
- What have you learned about the different personalities on the team?
- How do you use what you know to value the differences?
- How freely and openly do people share ideas?
- How safe is the environment for resolving conflicts?
- What feedback systems are in place?
- How actively do team members participate in decision making?

## ♦ **Growth & Development:**

- What can you say about practice growth?
- What are your standards for how you grow and develop the practice?
- What do you measure?
- How committed are you to growth that allows you to deliver the level of care and service to which you aspire?
- How balanced is your life?
- How does the health of the practice relate to the health of the people who work in

the practice?

- How profitable are you? How do you share profitability?

## *Designing a Plan*

When you look at the difference between how you answered those questions the first and second time they were asked, you can develop a plan for how to move toward doing, consistently and predictably, what you do best.

Ask yourselves the following questions:

- ♦ How are our responses to the *Vision Exercise* questions different from our responses to the *Current Reality Exercise* questions?
- ♦ What attitudes currently present in our practice will help us close the gap between the two?
- ♦ What attitudes will prevent us from closing the gap?
- ♦ How will we support each other in remembering the importance of *attitude*?
- ♦ How will we bring each other back to our vision when our attitudes get in the way of our progress?
- ♦ What skills do we have that will help us close the gap?
- ♦ What skills will we need to learn or develop?
- ♦ How will we develop those skills?
- ♦ What resources for learning will serve us best in going to the next level?

Keep in mind that you are not so much solving problems as building on the good foundation you have laid. As you work through the process of re-visioning your practice, think of yourselves as proud parents of growing children. You can be proud of your accomplishments at the same time that you recognize there is more work to do. You can also take responsibility for any part you've played in the qualities you are not pleased with; however, blame has no usefulness.

# PRACTICE RENEWAL



Most likely, there are pieces of the vision already in place. You may be recognizing some of those pieces for the first time. Often practices are unaware of how much they have accomplished. Now you can use those accomplishments as evidence of what is possible and as monitors of your progress.

As you begin to design the model for the future of your practice, it is important to move in a way that encourages growth, rather than closes it down. It is appropriate for each person to identify areas in which he/she will grow to support the vision. But if the gap between where you are now and where you want to be is too great, it creates frustration and disillusionment.

Research has shown that the potential for enjoyment in work is optimal when the opportunity for growth is appropriate to the individual's capabilities. When you find yourself feeling letdown after a learning experience, the chances are that the gap between your abilities and the action you want to take is too great. If the task is too easy, it produces boredom; too difficult, and it produces anxiety.

Research for the book, *Flow: The Psychology of Optimal Experience*, found that enjoyment appears "at the boundary between boredom and anxiety, where the challenges are just balanced with the person's capability to act." This is true for organizations as well as individuals. Collectively and individually, it is important to identify the skills you will need to move forward. Vision has power only if it is seen as possible. That sense of possibility comes out of a combination of attitude, skills, and systems. Your action plan must have strategies for all these.

## *Putting It All Together: An Example*

Let's explore a hypothetical practice and see how to apply the concepts we've discussed. You begin with a values clarification process providing rich examples of what gives life to your work. You talk about patients, procedures, teamwork, and growth. You tell the stories and talk

about what the stories mean to you. You have a healthy dialogue about personal and professional values.

You identify values conflicts, places in which your lives sometimes get out of balance and in which you feel torn between all the things that are important to you. Through the process you develop a deeper understanding of your co-workers, what they want out of life and what they want to contribute. You gain a renewed appreciation for the service you provide and the difference you make in people's lives.

Next, you ask yourselves specific questions about what the practice stands for. As you describe your current reality and compare your answers, you observe similarities as well as differences in terms of how you see the practice. You begin to better understand some of the things that get in your way. Perhaps you have some conflicting opinions about what you stand for in certain areas. The conversation allows for those conflicts to come to light and for you to reach consensus on the standards as they currently exist. A sense of pride emerges out of the stand you take as a practice. You already begin to have a greater commitment to the standards you've set.

As you move into identifying your preferred future, you allow yourselves to dream your fondest dream. You begin to envision a practice in which values, more than personalities, influence decisions. You look for ways in which everyone can contribute at the highest level of service and fulfillment, and ways in which everyone can feel rewarded in the manner important to him/her. You come to understand that it is more productive to invest in each other's success, than to compete for "your share."

## *Action Plan*

As you look at the difference between where you are now and where you want to be, you realize that the gap is not as great as you thought it was. You begin to see ways in which your vision is already in place and ways in which you can move toward the vision. You identify the three



## PRACTICE RENEWAL

key elements of your action plan: Attitudes, Skills, Systems.

- ♦ **Attitudes:** You realize that your attitudes have already begun to shift. You understand things differently as a result of the process. You are more aware of possibilities. You learned some things you didn't know before, and there are other things you now know in a different way. You recognize that you will sometimes lose sight of the vision, and you may forget the experience that has shifted your attitude, so you ask others on your team for support. You develop strategies that enable them to call your attention to times when your attitude is counterproductive. You ask their help in getting you back on track.
- ♦ **Skills:** As a team, you identify the skills each person will develop and a reasonable time line for mastering them. Whether the skills are administrative, clinical, or behavioral, you consider the resources you have at your disposal. You may need computer training, clinical training for the dentist and other clinicians, or you may need to develop your communication skills. You may find you have all the resources you need in-house, such as knowledgeable employees, books, and tapes. Or you may need outside learning in the form of a workshop or consultant. Whatever your needs, you work together to make the best use of practice resources for training and development. You set priorities for training that can make the most significant difference, and set clear goals so that each person can monitor their progress toward the goal. You also set parameters for marking your progress.
- ♦ **Systems:** Systems that support the vision are essential to your success. Instead of trying to "fix" problems with your systems, you can now evaluate each system in light of the vision. You may be surprised at how clearly you see the ways in which your systems are not serving you and the need to change them. You can identify the systems that work in opposition to the vision, and develop a long-range plan for implementing change. They

were not created overnight and will not change overnight. For example, the effects of your current scheduling system, recall system, and new patient process, will be experienced for some time after you begin to change the system. But that does not mean you delay the process of changing the systems. As you clarify what you want the systems to accomplish, you can begin a process of changing them sooner rather than later.

I hope that you will not see this process as either oversimplified or too complicated. I hope instead that you will allow yourself the luxury of tapping into some of the greatest resources your practice has: your values and your vision. Use all or parts of the exercises I've suggested in any way that seems useful to you.

Focusing on what gives life to your practice is a worthy endeavor. In my personal consulting work with practices, I am continually in awe of the power of a shared vision. Over the years I have experienced breakthroughs in practice growth that are often attributed to my work with a team. I like getting the credit, but what I always remind the team is that they *do* the work. It's their vision and their values that have the power to move them forward. I urge you to experience the power of your values and your vision to bring vitality to your practice.

### Classic & Current Resources

My work is influenced and informed by the wisdom of past as well as emerging new thinking. The following is a list of some of the sources I referred to while writing this issue of *Practice Renewal*:

***Appreciative Inquiry: A Positive Revolution in Change***

by David L. Cooperrider and Diana Whitney

***Flow: The Psychology of Optimal Experience***

by Mihaly Csikszentmihalyi

***The Change Handbook: Group Methods for Shaping the Future***

Editors Peggy Holman & Tom Devane



Mary H. Osborne, Resources

## PRACTICE RENEWAL

Meeting Planner

Phone: (206) 937-5851 • Website: [www.maryosborne.com](http://www.maryosborne.com)

### Values, Vision, Vitality

1. **Values Clarification Exercise:** Ask each person on the team to describe a high point experience in your practice, a time when he/she felt most alive and engaged. Ask each person to talk about what it was about that experience he/she most valued. Ask other team members to point out the values they hear in each story. Write down the values you hear. Now think about how those values can be applied to other situations. For example, if we value appreciation from our patients, how does that apply to our interactions with each other? If we value empowerment in our work, how does that apply to empowering patients?
2. **Current Reality Exercise:** Answer the questions on pages 4-5 to clarify your current reality in terms of Clinical Services, Patient Care, Team Participation, and Practice Growth. Be specific. Write down your answers.
3. **Vision Exercise:** Answer the questions on page 7 to clarify your vision in terms of Clinical Services, Patient Care, Team Participation, and Practice Growth. Be specific. Write down your answers.
4. **Action Plan:** Create an action plan to move from your current reality to your vision. Be specific. Ask yourself:
  - How are our responses to the *Vision Exercise* questions different from our responses to the *Current Reality Exercise* questions?
  - What attitudes currently present in our practice will help us close the gap between the two? What attitudes will prevent us from closing the gap?
  - How will we support each other in remembering the importance of attitude? How will we bring each other back to our vision when our attitudes get in the way of our progress?
  - What skills do we have that will help us close the gap? What skills will we need to learn or develop? How will we develop those skills?
  - What resources for learning will serve us best in going to the next level?