

Success in an Age of Transition

Shelley Simon, RN, DC, MPH, EdD

Given the rapidly shifting world in which we live and the significant changes that are often imposed upon us - technological, economic, political, and pending health care reform, just to name a few - it's no surprise that many chiropractors are finding themselves in the midst of business, career and life transitions. The adage that "change is good" sounds fine when you're making a planned, proactive transition such as moving to a new community, hiring an associate, or investing in a new piece of equipment. It's when unwanted change is imposed upon you that your ability to effectively manage a situation is challenged. Because even the best-laid plans sometimes go awry, it's useful to develop skills that will not only help you cope with the unexpected, but also will allow you use unanticipated transitions as opportunities to grow and evolve.

Here are some examples of unplanned and unwanted changes. Perhaps you've experienced one or more of these at some point, or maybe you're in a similar transitional moment right now:

- The practice where you've been employed is downsizing and you find yourself looking for a new opportunity in a tough economic climate.
- The office manager you've relied on heavily for several years gives two weeks notice, out of the blue.
- Your spouse files for divorce.
- A parent's health abruptly declines and you need to step in to help.
- The retirement you've been planning is on hold because your investment portfolio has taken a hit during the down economy.

In times like these, the tendency is to become emotional and reactive. Slipping into denial about the reality of the situation is a common response, as is anger, blame, and feeling uncertain about what to do next. Procrastination and apathy sometimes take hold, making it difficult to make plans and achieve goals that would lead to a more successful future.

But there are effective techniques you can use to regain your equilibrium and get back on the path to success during times of transition. It's about adopting the stance that while you can't control or undo what's occurring, you can use the situation as an opportunity to evaluate and perhaps even reframe your definition of success. If you remain mindful during a challenging time and slow down for long enough to assess your purpose, values and priorities, you may very well find that what looked initially like a serious problem is actually a prompt for stepping into a new chapter in your life or business.

In a moment, you'll read about how to leverage uncertainty to make it work in your favor. But first, here are three examples of clients I've worked with who have used unplanned change to redefine what success meant to them.

Using Change to Your Advantage

One chiropractor, during a particularly challenging time in his practice, chose to reassess his definition of success and think about what he genuinely wanted for the remaining years of his career. During this discovery process, he found that what made him feel successful in years past no

longer completely applied. Success going forward would be as much about how he felt about his work - having confidence, satisfaction and a sense of ease - as it would be about how many new patients he saw each week and how much money he put away for retirement.

Because of the downturn in the economy and the fact that he was at a stage at which he no longer wanted to promote his practice as aggressively as he once did, some of his old goals were no longer applicable anyway. He used this transition time as an opportunity to adopt a new point of view about practice success and realign his strategies to match his expanded definition of success. Today, he continues to practice, has less stress than he had in the past, and is focused on what legacy he would like to leave, both personally and professionally.

Another chiropractor had enjoyed having his highly skilled daughter as his practice administrator for many years until, because of her husband's job, she needed to move to another state. As they anticipated this change, it became apparent that even if they hired an experienced manager, they were sorely lacking in their ability to train someone who didn't have historical knowledge of the practice; they had no written policies, procedures or training tools. The doctor used this transition as an opportunity to put systems in place that would make the practice less dependent on a single individual to keep things running smoothly. His daughter stayed on long enough to create documentation and manuals for the office and train a new manager, who is working out well.

A doctor I worked with was already on the brink of career burnout when she found out that the PPO that served patients who made up 50 percent of her practice was merging with another company and reimbursement was going to be reduced to the point that she could no longer serve the patients. After the initial shock wore off, she took on the challenge of building up the cash side of her practice - something she'd been considering for a while, but had not previously had the motivation to pursue. She set about developing a detailed action plan that would support her in achieving her goal over a one-year period.

So, as these examples illustrate, it is possible to make even unwanted change work for you. Here is a five-step process that you can use during any transition, particularly those that are visited upon on you when you least expect and want them.

Making a Successful Transition: Five Key Steps

Step #1: Assess the situation. In order to effectively work through a transition and create a new plan for the future, it's essential to get a clear view of the current reality. Sticking your head in the sand is not a good strategy for effectively managing, much less moving forward proactively toward a new level of success. Take the time to sit down and write out the facts as you know them. What events led up to the situation? What exactly is the current change or challenge you are facing? What aspects of the situation can you control and not control? What are some possible outcomes - best case, worst case, most likely case? What would a highly successful solution look like? What are the first few obvious steps you should take?

Step #2: Look inward for answers. With the information from step #1 in hand, take a look inside. New ideas (and even tried-and-true ones) about how to achieve success during challenging times are fine, but too often we seek information from "out there" as a way to avoid looking inward and applying what we already know about ourselves. When individuals fail to reach their most important goals, it's rarely because they are unmotivated, unwilling or lazy. More often, it's because they don't appreciate the degree to which achieving success is a unique and personal endeavor - particularly during times of unplanned change.

As you consider the transition you are in and what you most desire moving forward, it may be

useful to look at how you typically respond and behave when you're under pressure. Do you swing into action or slip into denial? Is it your habit to blame others for an unpleasant situation, or do you go in the other direction and assume you're a failure because of what's occurring? Do you try to hang onto the past or are you willing to let go of what's not working and look for new options and opportunities? Acknowledging your habitual responses is a useful step in successfully coping with change.

Looking inward can also help you determine if the transition you are in is one that necessitates a major overhaul in how you perceive and manage your practice, or if you are more in need of a minor tuneup. Look for patterns to make this determination. If your "I didn't ask for this" unintentional transition is that your third associate in two years just packed her bags and left the practice, the situation likely demands major review and repair action. You may need to take a deep breath and then take the necessary steps to assess and upgrade your skills as a leader, for example. Or you may want to weigh the costs and benefits of having associates versus working solo.

Step #3: Let go of what no longer serves you. Hanging on to old attitudes and methods of managing your practice and your life may not be the best approach when dealing with an unplanned transition. For example, If you've had difficulty attracting the best employees because of an unwillingness to pay slightly above the going rate and offer a nice benefit package, letting go of the attitude that "there isn't enough money" might be in order. Or if practice marketing activities that were effective in the past are simply no longer yielding results, letting go of old tactics and identifying more creative ones (perhaps specifically geared toward attracting new patients in a difficult economy) is the answer.

Step #4: Do more of what works. As you think about times during your career when you've felt especially successful, what do you recall about the actions you were taking, the attitudes you'd adopted or the behaviors you were exhibiting? Sometimes success is no more complicated than pinpointing what has consistently worked for you in the past and doing more of that.

I know what you're thinking: "Easier said than done!" But if you stop and think about it for a few minutes, I bet you can recall times when you were engaged in activities that made practice and life feel easier, less stressful, and that yielded good results. Are you still doing those things? If not, why not? How might your situation and your future be different if you discovered and consistently applied some of your tried and true strategies?

I once asked a client of mine to articulate some of the factors that he felt had helped him achieve some recent successes in his practice. Here's what he revealed to me.

- He became more effective at communicating, especially around using stories as part of his marketing efforts.
- He was listening and questioning more and "telling" less. He came to understand that there is a difference between knowing something conceptually or theoretically and absorbing knowledge in a way that makes acting on it possible.
- He created a concrete marketing campaign that he was implementing with consistent activities.
- He involved his staff in helping him achieve his practice goals. Part of this involved learning to delegate.
- He allowed himself to become more curious and creative. He began trusting himself more and took more risks in his marketing and communication endeavors.
- He took a more authentic, affirming stance toward marketing and saw the folly of trying to turn everyone he met into a "lifelong patient" during an initial conversation. He learned that marketing is mostly about building relationships.

- He managed himself better -- his attitude, his time and his responsibilities as a leader.

Another client, during a time of unplanned change, struggled with feeling a sense of accomplishment in her practice. I asked her to identify times in her life when she was achieving what she set out to do and felt both motivated and satisfied. Here's what she came up with.

- She had a clear goal about which she was genuinely enthusiastic.
- She felt she had the necessary skills and knowledge to reach the goal.
- The timing was right.
- She set herself up to achieve some early, small successes.
- She believed in herself and in her ability to continue along this path to success.
- She felt happy, upbeat, energized, and focused.
- Because she was on track with her own goals, she found it easier to speak with patients and others about their own goals.
- She felt empowered because she stayed in action.
- She managed her priorities well, became highly organized, and led by example.

Notice that while there is some overlap between their list of success factors, a key difference is that the first client was more focused on the actions associated with achieving the goal, while the second reflected more on the process and experience of a previous successful transition. Neither approach is good or bad, right or wrong; it's just a difference worth noting.

In both cases, everything they stated they did to achieve success - actions and attitudes - are learned behaviors. By doing more of what they knew worked for them, they were able to move to a new level of success.

Step #5: Mapping out a new plan for success. A positive side effect of having to navigate an unplanned transition is that it presents an opportunity to craft a new definition of success based on the current reality and map out an updated plan for the future. A trap that many successful chiropractors fall into is that they buy into the idea that more is always better and continual practice growth is the only model worth considering. As you move through the different stages of practice - launch, growth, maintenance, winding down toward retirement - your definition of success can and should change.

Perhaps it's time to stop thinking in terms of growth for the sake of growth, and begin moving toward creating a satisfying practice that has, as one element, sustainable growth supported by strategic planning. If you've worked through the first four steps of this process, you probably have a pretty good idea about what is important to you in terms of purpose, values and goals. If not, take more time to reflect.

When you are clear on what you want, it's time to set new goals and create a strategic plan to achieve those goals. Don't think in terms of weeks or even months. Map out a quarter-by-quarter plan for the next year or two. Come up with some action steps that will ensure a few early "wins" - perhaps making a long-needed staffing change or having a meeting with your financial planner would set you on the right track and motivate you to continue implementing your success plan.

Effectively Managing Continuous Change

Transitions throughout life are inevitable. If you can develop the habit of viewing them as opportunities to learn and grow by applying steps such as those discussed above, you'll be less likely to slip into denial or become frustrated when unanticipated change presents itself. Instead, you will become skilled in leveraging change and making it work in your favor. Effectively adapting to and managing continuous change will support you as you move through every stage of your

practice and your life. You'll have less struggle and more enjoyment. And you'll come to realize that fighting with reality is losing battle - one that you have no need or desire to engage in.

JANUARY 2010