



MARKETING / OFFICE / STAFF

## 5 Secrets for Developing the Best-Ever Front-Desk CA

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I stood at the front desk counting end-of-day numbers: eight new, 136 regular for three chiropractors; half that again for physical and massage therapies. A good (busy) day – and every visit handled by my front-desk CA (FDCA).

I looked up as Claudine, my FDCA for over 18 months, handed me all the stats as she dashed for the door.

"Gotta go. Mostly good today. I'll give feedback at the huddle. See you then, good night," she said with a sincere smile. It was 6:12 p.m. and Claudine was rushing to get her son Philip from daycare – just minutes after the last patient left.

I looked at her workstation: nearly perfect except for Claudine's "work pile" that she would coordinate with the biller in the morning. But still, it was neat.



Everyone liked Claudine, but I was crazy about her. She ran my office at 600-720 visits a week, just like a Swiss watch - primarily because I planned it that way. Let's reveal my secrets for empowering a FDCA to be your best team member ... and in the best way ever.

### Set the Stage for Success

First, let's take a look at FDCA job duties: scheduling, greeting, routing and taking payments. Your FDCA controls the flow in the clinic. From their vantage point, they can see the schedule, the reception area and frequently, patient care areas.

Now tell me, who's the best person to give the orders concerning who goes where and when? Is it the DC - who may be behind closed doors and struggling to keep track of time? No; it's your FDCA. They're in the perfect position to quarterback the team, cut your stress in half and take real ownership of their position.

*Lloyd's law:* Train a strong FDCA on exactly how you want the office run. Then give them the whip and you'll learn phrases like, "Yes, Ma'am!" and "Where do you need me next?"

Here's my thinking: I work for the goals of the practice. I know I get to set those goals, but I also work as a treating doc for those goals.

My strategy is to share my vision for the practice and my goals with my FDCA. Then I tell them exactly how each [team member](#) needs to function, and give her responsibility and authority to direct the process to reach those goals. Then it's my job to bust my tail to be the best team member under the

FDCA's direction.

In essence, I go to work for my FDCA – and Claudine was a demanding boss. One of my associates, who hated being told what to do by anyone, said, "Dr. Lloyd, you let her boss you around!"

My response: "I don't mind being 'bossed around' by someone who bosses as well as she does. By the way, her boss (me) trained her and is thrilled with how she runs this place."

Just to be clear, Claudine was direct in her communication, but never rude or disrespectful to anyone, especially me, and the results were amazing.

Do you want your FDCA engaged and excited about the job? Do you want them to take ownership of their position? Do you want your FDCA to take care of your practice like it was theirs? Here's the secret: Outline the game, explain the rules, give them authority and responsibility to run the practice, and play your position like it's the Super Bowl and they're the coach. The synergy is exciting and the work is a fraction of what it might be now.

### Secret #1: Share Your Vision of the Practice

*Share your practice vision and patient care goals.* Not all people can do this position well, so pick someone with a strong work ethic who cares about the job. Share your vision and goals, train them well and train them often.

*Hot Tip:* This process of recruiting their heart to your vision requires an ongoing dialogue about what you're trying to build as part of their training. Ask for and listen to their feedback.

### Secret #2: Learn to Play by Your Own Rules

*Agree to play by the rules you set up, and require their enforcement.* This won't work if your ego is too fragile to take strong direction. For best results, lead by example, and insist your associates and other team members comply and get feedback from your FDCA. For example: "How did we do today, Claudine?"

*Hot Tip:* Playing by your own rules is very motivating for your FDCA. They can also become your cheerleader (not baby sitter) and help you stay focused throughout the day.

### Secret #3: Establish a Position of Authority

*Set up the authority and responsibility of the FDCA for the entire team.* To do this, gather everyone in an office meeting where the FDCA explains your shared practice vision, shared goals and each task in her job description. After that, have each staff person ask the FDCA this scripted question: "What do you need from me for you to run the team at peak performance? Tell me *everything* you need from me and I promise I'll do my best."

Everyone asks the question, takes notes on what the FDCA says, and repeats back to her for clarity. Yes, you do this, too. Remember, follow your own rules and lead by example.

*Hot Tip:* Instruct the FDCA to publicly recognize exceptional service from teammates at the next day's morning huddle.

#### Secret #4: Power of the Morning Huddle

*Call a morning huddle 15 minutes before patients arrive.* The whole crew gathers around the scheduler as you announce, "Claudine is going to tell us what she needs from us today." The FDCA might run her huddle like this:

"First, everyone functioned extremely well yesterday. A special thanks to Katie for her help during power hours, and Dr. Kane's overflow coverage was right on time. We rocked it!"

"Now, today's fairly busy, but normal morning flow until 10 a.m., when I've booked three new patients, followed by four ROFs; and then a busy late morning. I'll need Dr. Lloyd finished with all adjustments and ready to take the Smiths back for health histories at 10 a.m. sharp. Dr. Sanders, you'll start your new patient at the same time in Exam #2."

*Hot Tip:* It takes time for an FDCA to grow into the job the way you want it done. Be patient and strengthen their skills by telling them what to look for, and complimenting good insight and decisions. When the day has run smoothly, thank them.

#### Secret #5: Streamline

*Keep the FDCA job streamlined.* Resist the temptation to pile on tasks that require your FDCA to leave the front desk. If they're dashing back to take someone off therapy every 10 minutes, a simple job can become chaotic. And when the FDCA is pressured, they don't produce or handle flow well. Let's keep them at the front desk with as few distractions as possible.

*Hot Tip:* Instead of the FDCA helping with therapy or other back-office tasks, how much better would it be if they stayed at the command station involved in flow-related tasks to increase volume, such as inactive recalls to fill the gaps in the doctor's schedule?

Then, when the doctor needs help, how much better to have an associate who can not only be the doctor's clinical assistant, but adjust overflow, produce their own [new patients](#) and generate income for the clinic.

To have a successful practice that purrs like a kitten, even at high volume, we need more than tasks checked off on a checklist. We need motivated, engaged and empowered CAs and staff in every position of the clinic. Use this five-point plan to empower not only your front-desk CA with responsibility and authority, but also other positions. Before you know it, you'll have an entire team of super-star performers trained and eager to create your vision and reach your practice goals.