

Assessment for Personal and Professional Success

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Abstract

This article provides two assessment strategies to help dental professionals determine how close they are to achieving total success in their personal life and dental practice. Total success is defined as achieving and balancing success in three categories: physical health, financial health, and emotional health. By rating answers to questions on a scale from 1 to 5, the reader can determine the level of success they have attained in the various areas of their personal life and in their dental practice. This information may be useful in identifying those areas that need improvement to achieve total and balanced success. Interpretation of the scores and strategies to develop those areas requiring improvement are discussed.

Keywords: Assessments, personal success, practice success, balanced success

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Introduction

In his best seller book, "The Success Journey" (Thomas Nelson Publishers, 1997), author John Maxwell writes, "True success is not a thing you acquire or achieve. Rather it is a journey you take your whole life long."

If indeed the quest for success is a journey, then the steps for achieving success should be the same as planning a trip that include:

- Deciding on your destination
- Discovering your starting point
- Determining the best way to reach your destination

Accomplishing these steps enables us to determine the best route (most direct or scenic), mode of transportation, and timetable. The same is true when embarking on our "success journey" in life. Whether we are seeking success in our profession or in our personal life, our journey begins by asking ourselves three questions:



- What do I want?
- What is happening now?
- What is the difference?

Once we know the answers to those questions, we can determine our strategies and timetable for achieving success. This article is devoted to answering the second question, "What is happening now?" This is accomplished discussing two assessments, a Personal Success Assessment and a Practice Success Assessment.

Personal and Practice Assessments

Why two different assessments? One would think that since this article is written for the *Journal of Contemporary Dental Practice*, the Practice Success Assessment would be most appropriate. However, as a professional practice coach, I have discovered about 80% of the decisions my clients make with regards to their practice are determined by what they want in their personal life. The direction of the practice is based on their personal lifestyle and financial needs. Therefore, to develop

an accurate picture of where you are professionally and personally both assessments should be completed.

The Personal and Practice Assessments are divided into three sections enabling us to measure total success. What is total success? Total success is achieving success in three areas or cornerstones of your life.



- Financial Health
– Create and accumulate sufficient financial resources to allow you the independence to do the things you really want to do.



- Physical Health
– Have the physical ability to create and enjoy your financial resources.



- Emotional Health
– Eliminate the things in your personal or practice life that create stress and unhappiness and intensify the things that make you feel great.

To achieve total success all three cornerstones must be satisfied to the extent they are in balance with each other. Like a table; if all the legs are equal in length and the floor is level, the table is stable. If one leg is shorter than the others and the floor isn't level, the table is unstable and wobbles. The table can look magnificent, made of the most expensive wood, with intricate carvings, but until all the legs are in balance to each other the table is unusable.

The same is true of your personal and professional life. Until the three cornerstones are in balance with each other you cannot achieve total success. For example, in your personal life you may have accumulated a great amount of wealth. However, if your physical health is poor, you are unable to enjoy the activities and objects your wealth provides. Similarly, your practice can be very

lucrative, but if you hate going to work each day because of the stressful environment, then that can affect the emotional health in your personal life. The essence of achieving total success is your life is in total balance; personally, professionally, and with each other.

Completing the Personal and Practice Assessments enables you to evaluate where you are in your life and what you need to do to improve it. After completing these assessments, you will have an indication of your present status and in which areas in your life you need to work on to achieve more personal satisfaction, health, and happiness.

There are no right or wrong answers. Your goal is to rate yourself or your practice with complete honesty. The assessments will delve into many

areas of your personal and professional life but are not all-inclusive. As you complete the assessments, you may become aware of areas that are not listed. Feel free to make adjustments to the assessments to fit your needs.

Directions: Rate each statement on a scale of 1 to 5; 1 being virtually not at all and 5 being absolutely true. Place your number on the line provided and total your score at the end of each section. Interpretation of the scores will be discussed at the end of the article. Remember, the goal of the assessments is to give you a starting point for your journey to success. Don't be disappointed if you fall short of perfect scores at this point in time. Your scores will increase as you make progress on your journey to Total Success.

Personal Assessment

Physical Health Assessment

The Physical Health Assessment measures more than just your physical health. It also measures your attitude about health and the influence of your environment on your health. It indicates to you which areas of your physical life are contributing to a healthy lifestyle and those that need improvement. By achieving optimum health you have the energy and strength to effortlessly accomplish whatever you choose as well as having the backup energy to handle whatever emergencies may arise in your life.

1. _____ I have undergone appropriate physical check ups within the last year. (Eyes, ears, general, blood tests, dental, etc.)
2. _____ I am at the ideal weight for my size/body type.
3. _____ I exercise regularly (3 times/week).
4. _____ I am physically fit for my age.
5. _____ I have no neglected medical problems.
6. _____ I get enough sleep and sleep well with no reoccurring problems. (i.e., insomnia, sleep apnea, etc.)
7. _____ I regularly have "quiet/down time."
8. _____ I eat foods that provide optimum nutrition/supplementation.
9. _____ I drink adequate amounts of water (minimum 32 ounces/day)
10. _____ I avoid foods and habits that are deleterious to my health or reduce my energy (excessive caffeine, sugar, high fat, alcohol, tobacco, drugs, etc.)
11. _____ I recognize my illnesses and injuries and seek treatment in a timely manner.
12. _____ I have healthy ways of relieving my stress (exercise, therapy, talking, meditation).
13. _____ My physical environment contains minimal toxic substances, (asbestos, lead, pollutants, noise, etc.) that can harm my body or reduce my energy.
14. _____ I experience adequate light, fresh air, and comfortable temperatures.
15. _____ I surround myself with a neat, clean, and pleasant environment.
16. _____ My life is well organized.
17. _____ I regularly indulge my body in ways that make it feel and look great (massages, haircuts, manicures, saunas, etc.).
18. _____ I wear clothes that are comfortable, enjoyable, and make me look great.
19. _____ I participate in physical activities regularly that are enjoyable, stimulating, and energizing.
20. _____ I am satisfied with the quantity and quality of my sexual life.

Total Score: _____

Financial Life Assessment

Money, money, money . . . most people feel they don't have enough of it. They may feel it is a measurement of success. They may feel insecure or a sense of failure by the lack of it. By completing the Financial Life Assessment you will get an idea of how much money you truly need to be financially independent and how close or far you are from achieving it.

1. _____ I currently save at least 10% of my income.
2. _____ I have an idea of how much I need to be financially independent.
3. _____ I have a written plan to achieve financial independence.
4. _____ I have readily accessible savings available to support me for three months in case of an emergency or illness.
5. _____ I live well but within my means.
6. _____ I have a weekly budget that allows me to do the things I enjoy.
7. _____ I have a written one-year financial plan in place.
8. _____ I know how much I am worth at this time.
9. _____ I pay my utility and rent/mortgage bills on time.
10. _____ I pay my credit card balances within thirty days of receipt.
11. _____ I consult with financial planners on a regular basis (accountants, investment advisors, estate planners).
12. _____ I have the proper vehicles in place for transferring wealth to my loved ones and survivors (wills, trusts, and estate plans).
13. _____ I have established the vehicles for long-term savings (house, college).
14. _____ I have a retirement plan in place (IRA, Keogh, and pension).
15. _____ I have adequate health, disability, long-term care, life, home, and property insurance.
16. _____ My source of income is stable.
17. _____ I have a financially rewarding business/career commensurate with my skill, talents, and education.
18. _____ I have the opportunity to advance in my business/career.
19. _____ My financial vision is in sync with those around me.
20. _____ I control my money rather than my money controlling me.

Total Score: _____

Emotional Health Assessment

We are all engaged in activities and situations that cause us stress: work, school, relationships, financial situations, and life events. Stress can't be eliminated completely nor do we want to eliminate it completely. Some stress is healthy and propels us toward achievement of goals. It's when stress becomes excessive in our lives or when we are unable to manage stress that it causes emotional instability and problems. The first step in controlling stress is to assess our emotional makeup and ability to react to stress. It's only then we can take steps to create emotional stability and tranquility.

1. _____ I get along well with the people in my life (family, friends, coworkers, and bosses).
2. _____ I surround myself with people who want to be with me because of the type of person I am, and not for what I can do for them.
3. _____ I can control my rage though I feel justified for feeling it.
4. _____ I have the ability to let go of people who make me feel uncomfortable or take advantage of me.
5. _____ I'm comfortable seeking the help and advice of others, in times of need, rather than go it alone.
6. _____ I readily say, "I'm sorry" when I know I am at fault.
7. _____ I can accept the fact I am not perfect.
8. _____ I believe out of every negative situation, there is something to be learned or gained.
9. _____ I recognize my emotional needs and know how to take care of them.

10. _____ I live my life on my terms and not others.
11. _____ I have the ability to say “no” without guilt.
12. _____ I have the ability to forgive others and not hold a grudge.
13. _____ I maintain a positive attitude and always see the glass as “half full.”
14. _____ I don’t let the small things bother me obsessively.
15. _____ I confront and deal with uncomfortable situations rather than hide from them.
16. _____ I have the ability to distinguish between inconveniences and problems.
17. _____ I don’t obsess over events and situations that have occurred and I can no longer change the outcome.
18. _____ I spend ten minutes a day doing absolutely nothing.
19. _____ I feel there are enough hours in the day to accomplish everything that I need to do.
20. _____ I have a best friend or soul mate in which I can confide truthfully.

Total Score: _____

Practice Assessment

Completing the Practice Assessment enables you to evaluate the current state of your practice and those areas in your practice you need to work on to achieve Total Success.

Physical Health Assessment

The Physical Health Assessment measures more than just the physical layout of your office. It also measures the effect the practice’s physical characteristics has on staff productivity and attitude. It indicates to you how the physical layout of the office contributes to patient satisfaction with your practice. By designing and creating a facility in optimum physical layout you and your staff have the means to create an enjoyable working environment to provide great customer service to your patients.

1. _____ The dentist or staff conducts a visual inspection of the entire office (inside and outside areas) twice daily.
2. _____ Outside areas are attractive and appealing to patients and passersbys (landscaping, signs, etc.)
3. _____ The outside areas provide for adequate parking, lighting, and easy access to office.
4. _____ The physical plant provides adequate light, fresh air, and comfortable temperatures.
5. _____ The physical size (square footage) of the office adequately accommodates patient volume.
6. _____ The design layout contributes to efficient patient flow.
7. _____ The design layout allows for total patient confidentiality.
8. _____ The staff has adequate space to work without interfering with co-workers.
9. _____ Daily attention is given to office cleanliness, especially areas accessible to patients (reception area, treatment areas, and bathrooms).
10. _____ A protocol and delegation of responsibility for emergency cleanups are in place.
11. _____ Seating, floor and wall coverings, and fixtures are replaced or repaired in a timely manner when necessary.
12. _____ The physical plant has undergone a major face lifting and redecoration in the last 5 years.
13. _____ Clinical and clerical equipment is maintained according to manufacturer’s recommendations.
14. _____ Proper repairs to malfunctioning equipment are made in a timely manner.
15. _____ Protocols for storing, handling, and disposing of hazardous and non hazardous waste are followed in accordance with governmental regulations.
16. _____ Provisions for the safety and health for the dentist and staff are provided through the use of personal protection equipment and ergonomically safe equipment.
17. _____ Supplies are organized and labeled so they are readily available and easily located when needed.
18. _____ Hazardous materials and gases are stored, handled, and removed from the environment in compliance with government regulations.

19. _____ The office environment contains minimal toxic substances, (asbestos, lead, mercury, gases, pollutants, noise, etc.) that can harm staff and patients.
20. _____ Storage of patient records is well organized and easily accessible.
21. _____ Records of inactive patients are reviewed and purged on an annual basis.

Total Score: _____

Financial Health Assessment

Money, money, money . . . most dentists feel they don't have enough of it after all the expenses are paid. They may feel "net income" is a measurement of success. They may feel insecure or a sense of failure by the lack of it. By completing the Practice Financial Assessment you will get an idea of how successful your practice is meeting your financial needs and those area that need improvement.

1. _____ I have an accurate idea of what my personal financial needs are.
2. _____ The practice generates enough net income to meet my personal financial needs.
3. _____ I am aware the monthly practice gross production and the areas that contribute to it (dentist and hygiene production).
4. _____ I am aware of the precise amount of monthly receipts from my practice.
5. _____ I am aware of the monthly collection/production ratio.
6. _____ I am aware the amount of monthly practice overhead and the factors that contribute to it (salaries, supplies, utilities, etc.).
7. _____ I am satisfied with the amount of practice production.
8. _____ I am satisfied with the amount of office collection.
9. _____ I have a written one-year financial plan in place (number of new patients, number of returning patients, production, collection, net profit).
10. _____ I have easily accessible savings or a credit line to cover expenses for an emergency or economic slowdown.
11. _____ I have adequate cash flow to pay myself before I pay office expenses.
12. _____ Practice fees are evaluated and adjusted annually.
13. _____ I set aside monies to invest in service facilities (new equipment, decoration).
14. _____ My finances are such that I can take four weeks time off for vacation and continuing education.
15. _____ I pay bills with high interest rates (credit cards) within thirty days.
16. _____ I pay my utility and rent/mortgage bills on time.
17. _____ I consult with financial planners on a regular basis (accountants, investment advisors, estate planners).
18. _____ I have a retirement plan in place (IRA, Keogh, and pension).
19. _____ I have adequate health, disability, life, malpractice, overhead, office, and property insurance.
20. _____ I control practice finances rather than have practice finances control me.

Total Score: _____

Emotional Health Assessment

There are many situations we encounter in the dental practice that cause us stress: difficult relationships with co-workers and patients, financial situations, and unexpected daily events and mishaps. Stress can't be eliminated completely nor do we want to eliminate it completely. Some stress is healthy and propels us toward greater productivity. It's when stress becomes too excessive in our practice for us to manage, that it causes emotional instability and personal problems. The first step in controlling stress in the office is to assess the emotional makeup of the practice and our ability to react to stress provoking situations. It's only then we can take steps to create emotional stability and tranquility in the office setting.

1. _____ Team members (dentist and staff) enjoy rather than dread going to the office.
2. _____ Team members get along well with each other.

3. _____ Team members describe the practice as a “fun place to work.”
4. _____ As the team leader, I create a positive spirit for the practice.
5. _____ Team members are satisfied with their total compensation package (salary, benefits, and vacation).
6. _____ The staff understands their responsibilities and is provided with detailed job descriptions.
7. _____ Team members are empowered to be able to make decisions regarding how to perform their job without fear of consequences for mistakes.
8. _____ Team members can express themselves without repercussions.
9. _____ Team members are constantly provided with constructive feedback (praise and criticism) on their job performance.
10. _____ Team members are encouraged to confront and deal with uncomfortable situations rather than hide from them.
11. _____ Team members are aware of the philosophy and goals of the practice and how it relates to customer (patient) service.
12. _____ The slogan “service with a smile” is a practice philosophy.
13. _____ Team members are sensitive to patient fears as related to dental treatment (pain, financial, time commitment).
14. _____ Patients are invited to critique and provide suggestions to the practice via surveys.
15. _____ A service recovery strategy is in place to correct a situation when things go wrong with patient relationships.
16. _____ I feel my schedule is arranged so I can accomplish everything I need to do and not feel stressed.
17. _____ I don’t obsess over events and situations that have occurred in the office and the outcome can no longer be changed.
18. _____ I am satisfied with the extent of every team member’s contribution to the success of the practice.
19. _____ The demands of the practice does not place excessive demands on my personal life.
20. _____ I would encourage others to follow in my footsteps.

Total Score: _____

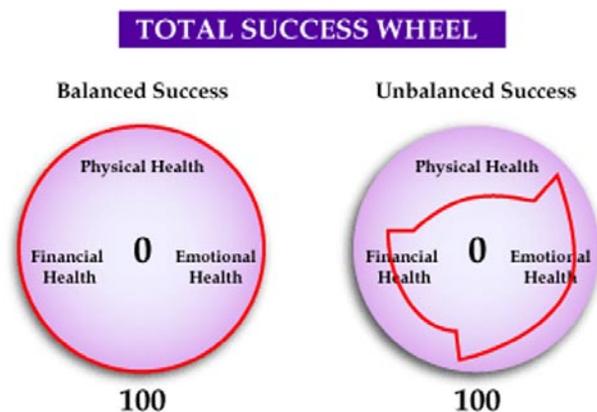
Assessment Evaluations

There are various ways to evaluate your assessment scores. One way is to look at the individual statements and notice where you gave yourself scores of 1 or 2. These are specific areas that need improvement and steps should be taken immediately to correct these deficits.

The second way is to take the total scores in each section and compare how balanced they are in relation to each other. Are your scores in the Financial Health Assessments much higher than in the Emotional Health Assessments? Such a discrepancy would indicate that while you are earning plenty of money, you’re dissatisfied with how you’re doing it. If your Emotional Health Assessment scores in both the Personal and Professional assessments are low, then assistance should be sought to investigate whether your personal life is affecting your practice life or vice versa.

For a graphic representation of how scores in the various categories contribute to the overall balance and satisfaction in your life, plot the total scores attained in each area on the Total Success Wheel. (Figure 1) With the center of the wheel as zero and the outermost circumference one hundred, draw an arc that corresponds to your score in each category. The variance or imbalance of the category scores will determine how regular or

Figure 1



irregular the wheel appears. If one was to imagine the wheel to be a tire on a bike, then the more irregular the tire wheel the bumpier the ride. If we take this representation one step further and imagine one wheel on the bike is our Personal Success wheel and the other the Practice Success wheel, we can visualize the concept that Total Success is based on both wheels being balanced and in alignment with each other.

Conclusion

Balancing and aligning the wheel by improving those areas in an individual's life that are deficient creates a smoother ride to a successful and fulfilling life. The Success Assessments are intended to give

you answers as to how balanced or bumpy your life is now. Unfortunately it raises many questions on how to achieve Total Success. To discover the answers it may be necessary to turn to professionals for help whether they are financial, health, psychological, spiritual, or even colleagues you admire. Consider turning to a professional, personal, or business coach for assistance on taking action.



Readers are invited to contact the author, Dr. Steven Schwartz, at DrSteve@Wowseminars.com with questions regarding their Assessment results. Appropriate questions will be used as the basis for future articles.

References

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About the Author

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Dr. Schwartz has maintained a private pediatric dentistry practice for over 25 years. He is a Diplomate of the American Board of Pediatric Dentistry and Director of Pediatric Dentistry at Staten Island University Hospital. He received his training in personal and business coaching from the Coaches Certification Institute in New York and is an executive coach with Right Management. As president of WOW! Enterprises, his seminars and coaching have inspired countless people to achieve their goals, be the best in their chosen profession, and fulfill their wildest dreams. Excerpts from his book "It's Your Choice! - Creating a Blueprint for Total Professional and Personal Success" can be found at www.wowseminars.com. He can be contacted at 800-618-8819 or e-mail at DrSteve@wowseminars.com.