


# The Ultimate Practice

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<https://hs.utah.gov/>

The entire plan of operations must be considered to make an office efficient



## Corporate Discipline

- Where we are going is determined by what we do
- How consistent we are will determine how fast we get there
- How is steering the ship will be monitoring if we are on track




## UTAH Employment Laws




<https://www.employmentlawhandbook.com/wage-and-hour-laws/state-wage-and-hour-laws/utah/>

## Leaders #1 Mistake

Attempting to **manage people**  
 Good people need to be led  
 Good people **don't need** managing



## The "BOSS" Quote

The boss is not always right, but none the less, he/she is the boss

Movie: A Bridge of Spies

**If serving is below you, leadership is beyond you.**

pablovillatoro

If you cannot remember anything else, remember this

Document, Document, Document  
 Keep an accurate log  
 Self-policing policies  
**Perform incident reports**  
 Identify witnesses, time, dates, everything  
 Law vs Justice

**YOU MAY SEE ME STRUGGLE BUT YOU WILL NEVER SEE ME QUIT...**

Effective Leadership... molds the environment

Effective Leadership... creates the culture

Leadership: Provides direction and guidance... art of influencing people to accomplish goals

Must lead by example  
 Provide clear guidelines  
 Be clear on expectations

- Inspire effective communication... upward, downward, and laterally
  - Developing a vision is one thing, but getting others to buy in is another task
  - Being decisive is a must ...leaders make decisions
- Provides Feedback

**Culture setting:** Managing staff: evaluation, hiring, dismissing, motivating staff, stress management in the office

- **Delegation of authority:** prioritization, accountability
- **Timeline management:** staff scheduling, patient scheduling
- **Meeting management:** agenda setting, delegation of reporting responsibilities
- **Day to day operations:** accounting, budgets, managing expenditures (payroll management)
- **Office organization and systems structure**

The Shuler Group

**Culture setting ... continued**  
**This is what leaders do!**

- **Legal and ethical aspects of management**
- **Improving financial performance:** fees, credits and collections
- **Goal setting**
- **Handling difficult people**
- **Handling difficult staff**
- **Handling difficult situations**

The Shuler Group

Words

- Right word, right time to get desired results out of people
  - No - Actually
  - I need you to – I'm counting on you
  - What? – Tell me more

Favorite Discipline Starters

- "In the future..."
- "I'd like to hear your thoughts about..."
- "Can you help me understand..."
- "Let's take some time to discuss..."

## Rules for Leaders

- Three positives are needed to balance out one negative statement
- Important that you believe in staff and trust that change/improvement can happen.

## Team building

- Professional work attitudes
- Accountability
- Responsibility
- Task completion
- Communication
- Rescuing each other
- Looking for signs of burnout
- Neutralizing toxic employees



## Pre-Employment Assessment

- 4 dimensions of Behavior
- How you respond to problems and challenges
  - How you influence others to your point of view
  - How you respond to the pace of the environment
  - How you respond to rules and procedures set by others.
  - Communication skills
  - Interpersonal skills
  - Time management skills

From the internet

## Attributes of Every Good Team

- Trust... linked to the behavior of team
- Ethical Behavior... doing what is right
- Sharing... actively listening and speaking
- Critical Judgment... sincere/factful criticism
- Synergy... the ability to work with harmony /smoothly
- Cooperation... breeds ownership
- Integrity... the bridge between character and conduct

## Individual Contributions

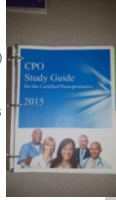


- Your **contributions** to the team depends on you
- Your **attitude** depends on you
- What you **accept as negative** depends on you
- **Being positive** depends on you



## Technician and Staff Training

- OJT - 6 mos minimum for competency
- Techs training Techs (same for other positions)
- Well trained techs set bar for new hires
- Wide array of procedures within reach of techs
- It takes a village to train a "super tech"
- AOA, ABO, and other Certification programs



## Technicians Own Their Work

- Techs stay with patient as much as possible
- Techs may have assigned exam rooms and doctors
- Responsibility for maintaining and stocking their exam room
- Coordinate care, eg referrals and patient follow-up
- Technician staying with patient start to finish creates a bond
- Perform audits on their own work



## 10 Characteristics of Effective Leaders\*

- Cultivating a high standard of personal ethics
- High energy
- Not just setting priorities, but good at working priorities.
- Having courage
- Working hard with commitment and dedication
- Going with the urge to create
- Getting goal oriented
- Maintaining a constant enthusiasm
- Staying level headed
- **Helping others to grow**

*\*Leadership When the Heat is On - by Danny Cox*

## Referral Sources

A cultivated network of Providers:

- Optometrist
- Ophthalmologist
- Primary care physicians
- Pediatricians
- Emergency rooms



## The Value of Time



How much per minute to engage a patient?  
**Staff vs Provider**

- How much is it worth?
- How much do you make on the patient in your chair?
- You will never get back the time you lost
- Pay others for their time if you expect to get paid for yours

## Schedule Management

- Patient flow
- Staff availability
- Re-work
- Staff utilization
- Resource management



### Staff Development/ Training

- **The staff will make or break practice**
- Staff leadership important
- An experienced staff helps to create an efficient environment
- staff focuses on the process
- Monitor staff behavior and process
- **Personal plans**



### Collaborative Team Case Study

- Retinal photos: how to utilize efficiently?
- New protocols put in place with staff input
- Screening photos standard procedure
- Increases efficiency and patient flow
- *If staff participate in decisions, buy-in is built-in*



### Training Benefits

A larger, well-trained staff recruits, refers, and trains new staff, creating a cycle that grows the practice and promotes a high standard of patient care



### Refraction



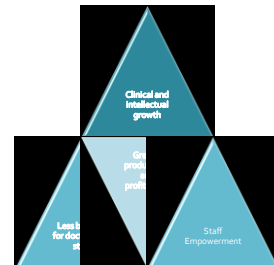
- Refraction presents unique training challenges
- Need critical mass of tech support to undertake
- More technicians per doctor required
- Need critical mass of exam rooms
- Benefits: speeds up exam tremendously, elevates stature of technicians and builds their patient relationship, allows doctor to focus on eye health and patient management, minimizes patient time in office
- Self-perpetuating once there is a core number of technicians refracting (techs training techs)
- Patience acceptance is very high (tech and patient bond)
- **State laws must be adhered to (Arkansas License state)**

### Optical Handoff

- Critical juncture in the exam process
- Staff communication and messaging vital
- Seamless transfer important, formal introductions best
- Methods: doctor walks, doctor pages, tech walks, optical comes to exam room
- Paging systems



### Benefits of Higher Staff Utilization



### Business Goals

| Category                           | Practice Goals |
|------------------------------------|----------------|
| Cost of Goods <b>25%-33%</b>       | 26%            |
| Salaries & Benefits <b>15%-22%</b> | 18%            |
| Occupancy Expenses <b>4%-8%</b>    | 6%             |
| Marketing <b>2%-5%</b>             | 3%             |
| General Office <b>6%-9%</b>        | 7%             |
| Total expenses (58-60)             | 60%            |
| Net earnings (38-40%)              | 40%            |

Business and Social Marketing plans... social marketing is very low cost high impact



### The Business Plan

- Strategic plan
- Tactical plan
- Capable leadership
- Effective resource management
- Established patients
- Referral sources
- Experienced staff



“ Leadership is not about being in charge. Leadership is about taking care of those in your charge.

- Simon Sinek

### Developing Roles for ODs

- Expanding clinical roles for doctors
- Patient care and medical management
- Establishing the proper environment
- The importance of authority
- Lasers in three states (KY, LA, OK)

Demonstrate How To Create an Effective Cross Training Program

Everyone Trains

- Admin
- Front Desk
- Screening
- Testing
- Optical
- Checkout
- Billing



Doing the right thing in the right way, all the time



Who's In-charge



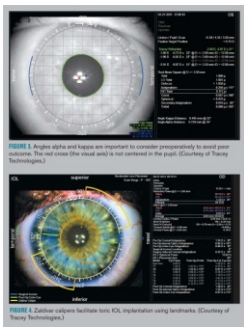
- Why Leadership Is Important
- What Happens When Leadership Fails
- How Do You Know Leadership is Working
- The Alexander Haig Syndrome
- Effective Leaders reduce workplace stress
- Owners of the culture

What the Staff Needs from Leadership

- Sincere appreciation
- Predictable, pleasant work environment
- To be included in the full journey

Proper clinic protocols

- Key tasks
- Written guidelines
- Standards
- Proper process reviews
- Peer reviews
- Clinical practice guidelines
- Flowcharts



Proper Product use

- New technology
- Most effective way to use it
- Vendor agreement for coming back
- Proper training
- Process owner
- Reporting: are we getting our monies worth?



Develop An Attitude of Ownership

- Team Building Tools
- Office Meeting Opportunities
- Reporting on Specific Areas
- Additional Duties



Show How These Efficiencies Can Help the Practice

Go After The Entire Family



Caution with change: The SIP Test



- 1972 Soft Drink industry
- Coke owned 18% of the industry
- Pepsi owned 4% of the industry
- Pepsi wanted more so they came out with the Pepsi challenge and gained in the market and made coke nervous
- Coke changed and loss loyal customers
- Careful with your changes

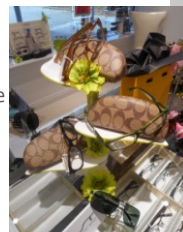
A THRIVING Optical

- A trained and experienced staff
- Staff who thirst for knowledge
- One who avoids the kool-aid
- Seeks what is best for the practice/patients
- Understands the value of the customer



Establishing Targets and Goals

- Establishing Correct Goals
- Monitoring Systems
- Each Patient Contact
- Validate Patient Care
- The Patient's Experience
- Patient Returns





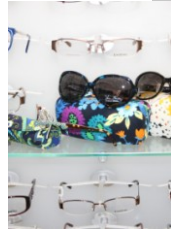
## Appearance

- Clean and Bright
- No Clutter
- Current Point of Interest From Frame Reps
- Updated Décor, Not "Dated Décor"
- All Frames On a Frame Board or On Risers
- Frame Board Management



## Know Your Products

- Offer Latest Technology In Products
- Each Staff Must Have Good Product Knowledge
- Know How To Explain Product Benefits To Patients
- Know and Offer All Warranties On All Products



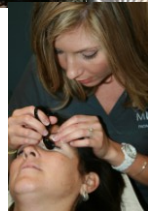
## The patient experience

- Timely and informed encounters
- The desire to return should be desired
- From Check-in to check-out
- Premium customer service
- Competent staff handling
- Medical knowledge
- Patient education



## Patient Care Occurs

- Check-in to Check-out
- Hand-offs
- Know patient's expectations
- Address the patient's lifestyle
- Verify customer satisfaction
- Quality products



## Performance

- Build a strong foundation.
- Establish boundaries.
- Create a communicative environment.
- Don't be a "second guesser."
- Help people be successful.
- Set the example.
- Develop self-discipline



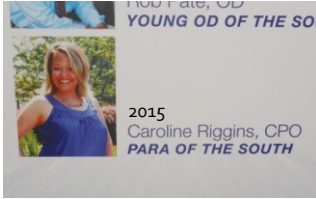
## Performance Feedback

- Staff development tool
- Accountability
- Responsibility
- Specific areas for improvement
- Achievable personal goals



### Provide Regular Performance Feedback

- Mission of the organization
- Job performance
- Specific areas of responsibility



### Swift

Discipline in private  
As close to error as possible

### Consistent

Should be able to anticipate  
Even keel every time

### Fair

Punishment matches crime  
Each staff treated the same

## Clear Boundaries



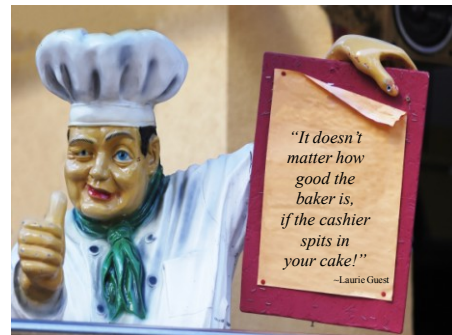
## Facebook

- Public
- Permanent
- Embarrassing
- Employment based
- Not a place for assaults
- Increasingly used
- Corporate
- HR profiled



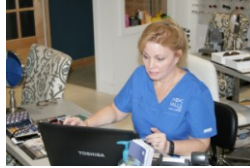
## Demonstrate How Creating an Effective Cross Training Program

Often times success in connecting with patients is less about behavior and more about perception.



### Position Descriptions

- **Everyone** knows and understands their role
- Something used during performance evaluations
- Reference tool



### Develop Checklist



- Key Task
- Flow Charts/ Decision Tree
- Operational Checklist
- Emergency Checklist
- Compliance Checklist
- Following processes and predictability



### The Role Patient Education and Community Outreach Plays

### Crazy

Defined as: doing the same things and expecting a different result

### Change Management

- Historical ways of doing things
- EMRs
- HIPAA other compliance programs
- Turnover is a killer
- New procedures



### Building The Team

- This is a negative indicator for leadership when turnover is high
- Turnover means start over
- Must have a solid hiring process
- Must maintain a culture that improves its members

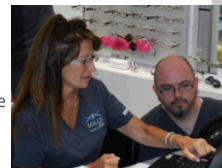


Compliance programs and enforcement  
 HIPAA  
 OSHA  
 Workplace violence  
 Infection control  
 Medical Fraud



### Current Industry Trends

- The medical model
- Use of lasers
- Diagnostic equipment
- Blue Light
- Ocular Surface Disease management
- Staff development
- Political arena
- Scribes



### Target Areas

- Professional organizations
- Rotary Clubs
- Lion Clubs <http://www.lionsclubs.org/EN/index.php>
- Automotive Associations
- Hospitals (emergency room personnel)
- Fire Department
- Parent and Teachers Associations
- School Nurse Associations



Success occurs when opportunity meets preparation.

-Zig Ziglar



Slogan:  
 What defines us

•United We Stand,  
 Divided We Fall



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Thank you so much