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104

Leading Staff to Excellence

Mark Wright, OD, FCOVD

Room: Santa Barbara

Please no cameras or recorders during the class presentation. You will be asked to leave the room if request is not followed.

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- ✓ If you must leave the class for any amount of time keep in mind if you are out of the room for more than 10 minutes, you will not receive any CE credit.
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This course material and information was developed independently of any assistance.

I do have the following financial arrangements to disclose:

Essilor - Honorarium/ Speaker
Alcon - Honorarium/ Speaker
Review of Optometric Business - Salary/Professional Editor
Pathways to Success - Salary, Bonuses, Profit/Owner
Progressive Publishing Co. - Salary, Bonuses, Profit/Owner

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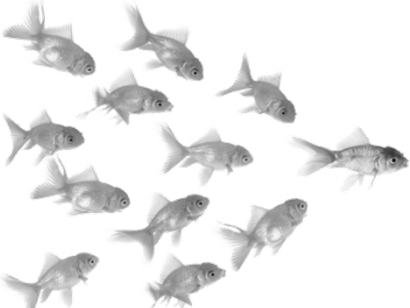
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Leading Staff to Excellence

Mark R. Wright, OD, FCOVD



Mark Wright, OD, FCOVD



- President: *Pathways to Success*
- Editor: *Review of Optometric Business*
- Author: *Coding, Reimbursement and Contracting for Optometry*
- Director: The OSU College of Optometry Business Management Program
- 2006 Benedict Professor: University of Houston
- 1980 – 2007 Founder: Professional VisionCare, Westerville, Ohio


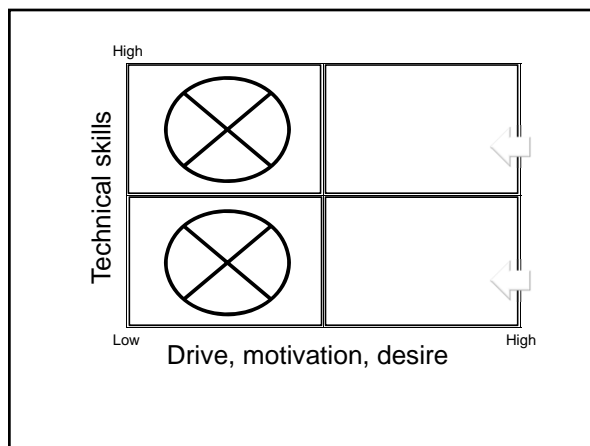
SPEAKER FINANCIAL DISCLOSURE STATEMENT

- Mark R. Wright, OD, FCOVD is a paid speaker for the following companies:
 - *Alcon*
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 - *OEXcellence*
 - *Jobson*
 - *Vision Source*
 - *Vistakon*
 - *VSP*
- He is an officer of:
 - *Pathways to Success*
 - *Progressive Publishing Company*
- He is the professional editor of:
 - *Review of Optometric Business*

Outline

- **Know your team**
 - The key role of personalities
- **Adding new team members**
 - When to hire
 - Where to find
 - Interviewing
 - Orientation
 - Common Mission Statement
- **Managing new team members**
 - Proficiency test
 - Role of relationships
 - Understand behavior
 - When to meet

Know yourself, your staff and your patients

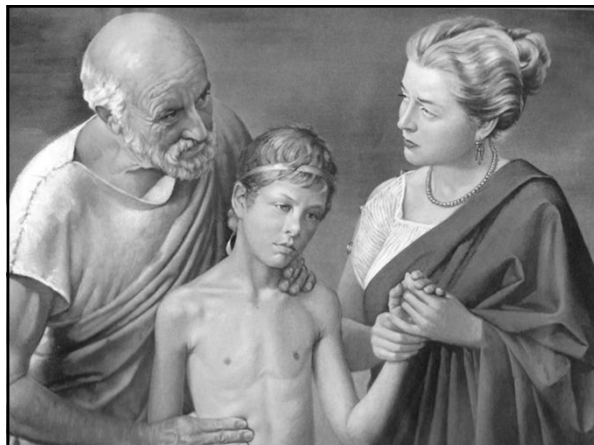
The Myers-Briggs™ Type Indicator

(The Keirsey Temperament Sorter)

E Extroverted (Expressive)	S Sensing (Observant)	T Thinking (Tough-Minded)	J Judging (Scheduling)
I Introverted (Reserved)	N Intuitive (Introspective)	F Feeling (Friendly)	P Perceiving (Probing)

Myers-Briggs

ISTJ Doing what should be done	ISFJ A high sense of duty	INFJ An inspiration to others	INTJ Everything has room for improvement
ISTP Ready to try anything once	ISFP Sees much but shares little	INFP Performing noble service to aid society	INTP A love of problem solving
ESTP The ultimate realists	ESFP You only go around once in life	ENFP Giving life an extra squeeze	ENTP One exciting challenge after another
ESTJ Life's administrators	ESFJ Hosts and hostesses of the world	ENFJ Smooth talking persuader	ENTJ Life's natural leaders

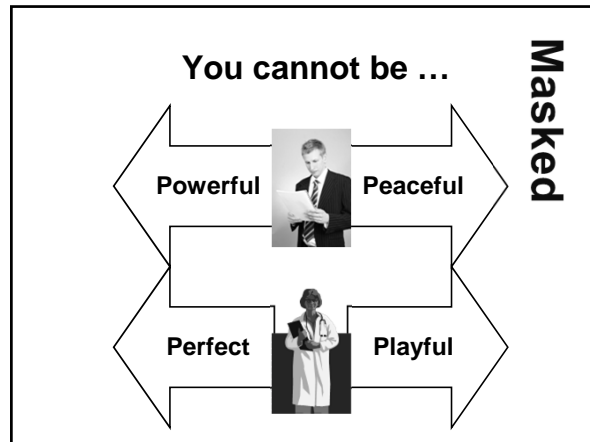


Hippocrates	Sanguine	Choleric	Melancholy	Phlegmatic
Schwartz (DISC)	Influence	Dominance	Compliance	Supportive
Smalley & Trent	Otter	Lion	Beaver	Golden retriever
Richard	Pepper	Garlic	Ginger	Parsley
Littauer	Playful	Powerful	Perfect	Peaceful
Williams	Talkative	Impulsive	Deliberative	Timid
Senn-Delaney	Promoters	Controllers	Analyzers	Supporters
Kostis (golf)	Fuzzy Zoeller	Tom Kite	David Graham	Ben Crenshaw
Shyne	Friendly	Aggressive	Prudent	Reserved
McCarthy	Colleague	Manager	Analyzer	Watcher
Douglass	Talkers	Achievers	Thinkers	Affiliators

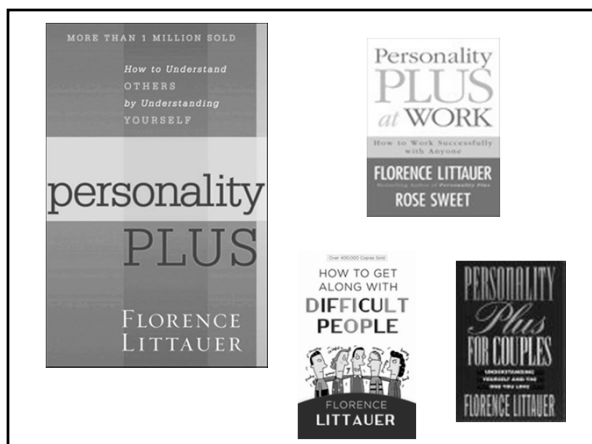
1	2	3	4
Animated	Adventurous	Analytical	Adaptable
Playful	Persuasive	Persistent	Peaceful
Sociable	Strong-willed	Self-sacrificing	Submissive
Convincing	Competitive	Considerate	Controlled
Refreshing	Resourceful	Respectful	Reserved
Spirited	Self-reliant	Sensitive	Satisfied
Promoter	Positive	Planner	Patient
Spontaneous	Sure	Scheduled	Shy
Optimistic	Outspoken	Orderly	Obliging
Funny	Forceful	Faithful	Friendly
Brassy	Bossy	Bashful	Blank
Undisciplined	Unsympathetic	Unforgiving	Unenthusiastic
Forgetful	Frank	Fussy	Fearful
Interrupts	Impatient	Insecure	Indecisive

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Interrupts	Impatient	Insecure	Indecisive
WHAT DOES EACH GROUP WANT			
To have fun	Control	Done perfectly	No conflict
WHAT DOES EACH GROUP NEED			
Attention	Achievement	Order	Respect
Approval	Appreciation	Sensitivity	Feeling of worth

Personality	Strengths	Weaknesses
Playfuls	- Fun to be around - The life of the party	- Don't always get work done - Procrastinate
Powerfuls	- Take control - Achieves more in a short period of time than others - Usually right	- Do not care about people's feelings - Ignore rules - Not detail oriented
Perfects	- Detail oriented - Gets things done - Great analysis	- Analysis paralysis - Believe they are right even when they are wrong - Super-sensitive - Hold a grudge forever
Peacefuls	- Loyal - Easy to be around - Tend to please	- Achievement is not a priority - Avoids conflict - Work on their own time frame



	Powerful	Perfect	Peaceful	Playful
+	Office manager Optician	Office manager Optician Bookkeeper	Bookkeeper (Optician) Bookkeeper	Receptionist Optician
	Chairside Pre-testing Auxiliary testing	Chairside Pre-testing Auxiliary testing	Chairside Pre-testing Auxiliary testing	Chairside Pre-testing Auxiliary testing
-	Bookkeeper (Office manager)	Receptionist (Office manager)	Office manager	Bookkeeper



- **HIRE PERSONALITY, TRAIN SKILLS**
 - It is difficult to teach compassion, caring or kindness.
 - Different positions in the office require different personalities and skills
 - If a person has intelligence, they often can be taught skills
-

Personality tests do not measure

- Stress
- Emotions
- Maturity
- Intelligence
- Mental disturbance
- Trauma
- Skill level

Personality tests do

- Help you understand your preferred way to think and behave, therefore, how to ...
 - Deal with people
 - Contribute more to the team
 - Reduce stress
 - Enjoy work more
 - Enjoy life more

Outline

- Know your team
 - The key role of personalities
- Adding new team members
 - When to hire
 - Where to find
 - Interviewing
 - Orientation
 - Common Mission Statement
- Managing new team members
 - Proficiency test
 - Role of relationships
 - Understand behavior
 - When to meet

When to hire

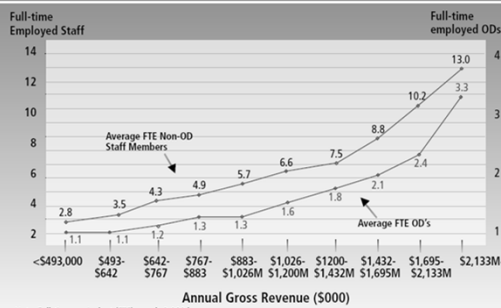


Benchmarks when considering hiring

- Payroll as an average % of gross
 - Under \$500,000 15-18%
 - Over 1,000,000 20-22%

Includes all benefits, insurance, vacation, continuing education benefit

Staffing Levels by Practice Size



\$ collected / FTE staff
Ratio has not changed much over 5 years

\$2,133,000+	\$175,000
\$1.7M-2.1M	\$145,714
\$1.4M-1.7M	\$142,306
\$1.2M-1.4M	\$138,703
\$1M-1.2M	\$135,127
Median	\$135,104
\$883K-1M	\$128,107
\$767K-883K	\$130,507
\$642K-767K	\$122,262
\$493K-642K	\$127,288
<\$493K	\$113,871

\$686,000
divided by
\$135,104
= **5.08**
FTE staff

Source:
MBA
Practice Profile

When to hire

Smaller practices pay 10% lower
Numbers increase by 1.9% yearly

POSITION	Hourly Ave	Hourly Median	Annual Median
Office Manager	\$ 23.60	\$ 21.65	\$ 45,026
Optometric Assistant	\$ 13.96	\$ 13.43	\$ 27,944
CL Technician	\$ 15.57	\$ 15.22	\$ 31,659
Optician	\$ 17.76	\$ 17.22	\$ 35,814
Lab Manager/Tech	\$ 18.74	\$ 18.23	\$ 37,925
Receptionist	\$ 13.88	\$ 13.36	\$ 27,790
Bookkeeper	\$ 18.17	\$ 17.04	\$ 35,251
3rd Party/Ins Biller	\$ 16.01	\$ 15.86	\$ 32,978

Where to find a future employee

- Referral from current staff
- Current patient
- Lab representative
- Craig's List (other internet postings)
 - Newspaper listing
 - Employment agencies



Looking for experience not personality

Patient Services and Intake

Busy multiple doctor office looking for a detailed and caring individual to assist our patients with appointment scheduling, insurance verification, and recall. Candidate must be basic computer proficient and willing to learn a multiple line phone system. Position also includes reception responsibilities such as greeting patients and chart preparation. Candidates need to be available for some evening hours and Saturdays.

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Playful	Persuasive	Persistent	Peaceful
Sociable	Strong-willed	Self-sacrificing	Submissive
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Optometric Assistant Ad

Are you calm yet strive for perfection?
 Are you patient and detail oriented?
 Are you a quick learner who can adapt easily?
 Are you looking for a career in the medical field?

If yes, then send resume to ...

Bookkeeper ad

Do you gain satisfaction from a job well done?
 Would your friends describe you as:

- Detail Oriented?
- Dependable?
- Organized?
- Someone who strives to exceed expectations?
- Customer Service Oriented?

If you answered yes to these questions, send resume to ...

Now I've posted my ad and received responses

APPLICATION FOR EMPLOYMENT

PERSONAL INFORMATION DATE OF APPLICATION: _____

Name: Last _____ First _____ Middle _____

Address: Street _____ Apt. _____ City/State _____ Zip _____

Alternate Address: Street _____ City/State _____ Zip _____

Contact Information: () _____ Home Telephone () _____ Mobile _____ Email _____

How did you learn about our company? _____

POSITION SOUGHT: _____ Available Start Date: _____

Desired Pay Range: _____ Are you currently employed? _____
By year or date

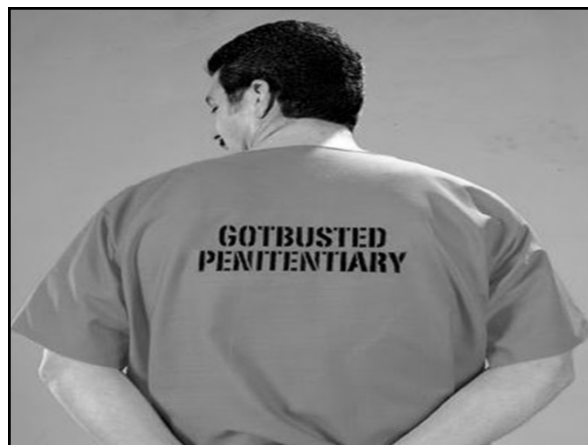
EDUCATION

Name and location	Graduated - Degree	Major Subjects of Study
High School		
College or University		
Specialized Training Trade School, etc.		
Other Education		

Please list your areas of highest proficiency, special skills or other items that may contribute to your ability in performing the above mentioned position.

The interview process

- **Screen the resumes**
 - Look for **obvious** problems
 - Wrong practice listed in cover letter
 - Inappropriate grammar, wording
 - Job hopping
 - Inadequate qualifications
 - **Less obvious**
 - Return address



Recruiting: Interview process



- An opportunity to tell your story
- An opportunity to find the right person

G. Neil Skills Ability



Personnel Ability Test

- Unscramble the following letters to form a word whose meaning is "to feel". What is the last letter of this word?
H O C U T
- Look at the row of numbers below. What number should come next?
28 25 22 19 16 13 10 ____

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Service Ability Test

- How much do you agree with the following statement? "On the whole, people tend to complain about matters that are insignificant."
 - Strongly agree
 - Agree
 - Disagree
 - Strongly disagree

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Service Ability Test

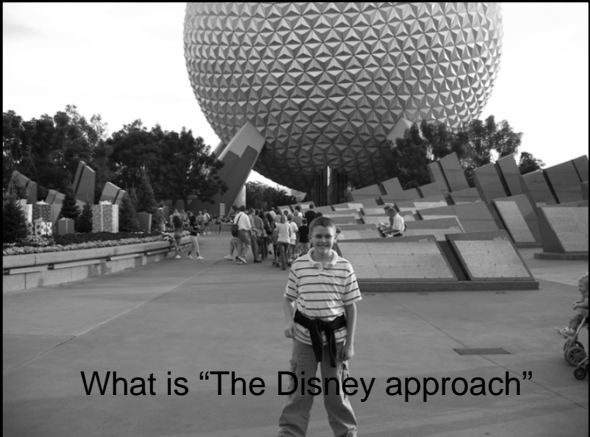
- You are a customer service representative. A customer calls with a problem. It will take you 5 to 10 minutes to research the problem and respond to her needs. What would you do?
 - Politely place the customer on hold while you research her problem.
 - Ask the customer to call you back in 15 minutes.
 - Ask for the customer's telephone number and say you will call her back as soon as you resolve her problem.
 - Place the customer on hold for 5 minutes. If you see it will take you longer than that to solve the problem, ask if you can call her back.

Welcome to our practice, now fill out all these forms first OR

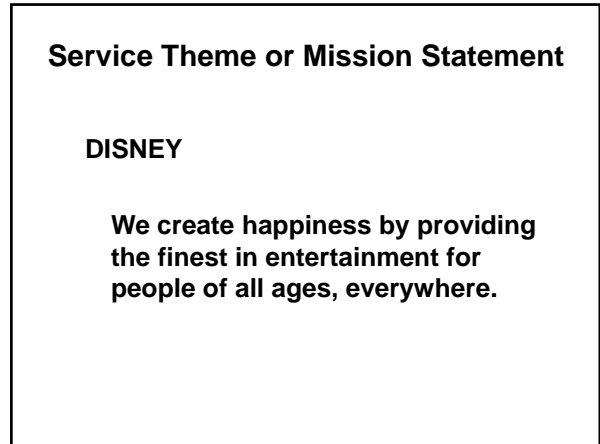


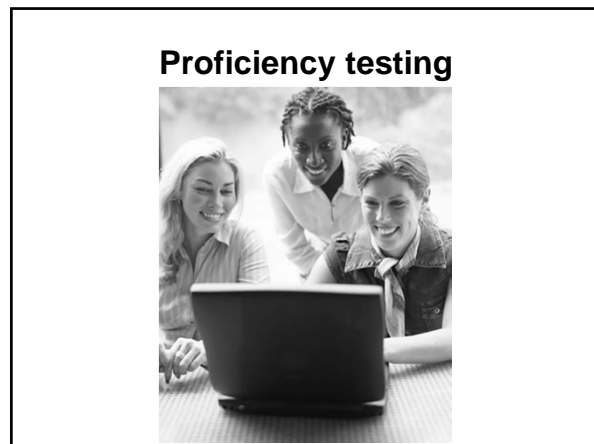

Orientation

Tell them you care



What is "The Disney approach"





Outline

- **Know your team**
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People don't always do what you expect, they will do what you inspect

- **Proficiency test at the end of training**
- **Proficiency test randomly throughout the year**
- **Retrain and proficiency test anyone who develops a problem**



How Much Can Your Employees Get Away With?

Josh Davis
Oct 15, 2012
Web

The "if-then" logic of your behavior

What are you really going to do?

Contingency maps

Everyone knows what they can get away with and what they have to do.

This is independent of motivation, rewards and punishment.

Everyone tends to not do what they can get away with not doing.

Pattern Recognizer

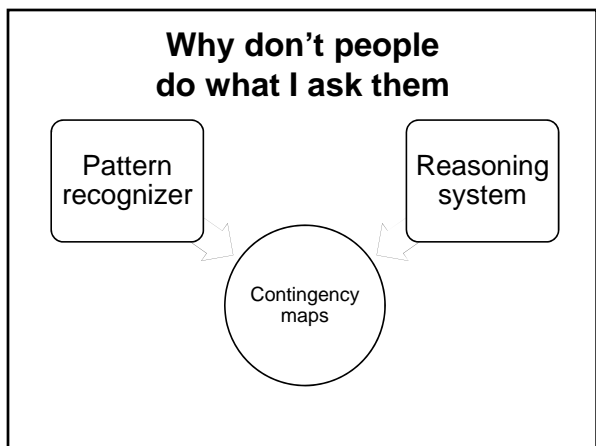
- We know ...
 - Who says there is a penalty but doesn't follow through
 - Who's always late for work or coming back from lunch
 - What situations will make our co-workers angry
 - Which paperwork will have little effect
 - How long it really takes to get a response from a boss
- The default mode of the brain is to rely on this pattern recognizer and follow the contingencies it has picked up

5 - 10 mph HIGHER?

SPEED LIMIT 45

SPEED LIMIT 25

YOUR SPEED 32



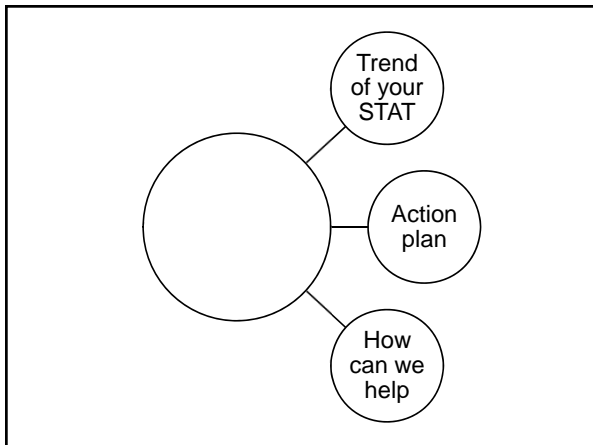
Reasoning System

- When the PATTERN RECOGNIZER isn't able to handle the situation the REASONING SYSTEM kicks in.
- It is responsible for deliberate self-conscious decisions about how we behave.
- But, with a higher cost in metabolic activity and quick fatigue

- Managers most often ask the REASONING SYSTEM (RS) for compliance, but most of the time it's the PATTERN RECOGNIZER (PR) that drives behavior
 - **“Let’s start our meetings at 9 am.”**
 - Without a trigger to grab the attention of the RS each time and override the PR, the PR will figure out when meetings really start and people will arrive accordingly

- ### What’s the answer?
- STOP GIVING MIXED MESSAGES
 - Show the PR system by your behavior exactly what the rules are
 - Once the PR system comes to expect the safe bet is to do what you ask when you ask it, then you’ll watch compliance improve

- ### How can I fix this?
- What are your contingency maps
 - What are the unwritten rules you are communicating about how things really operate (and how they will operate after a change)
 - What is consistent in your employees behavior
 - They are following your contingency maps



January	February	March
April	May	June
July	August	September
October	November	December

How often

- Daily
- Weekly
- Monthly
- Quarterly
- Yearly

- ### Action plan
- 1
 - 2
 - 3
 - 4
 - 5
 - 6
 - 7

The joy of a well-run clinic



We are here to help!

Thank you !

