A GUIDE TO EXPERT STAFF MANAGEMENT IN EYECARE

AN EXPERT MANAGER

Deciding which management style is right for your practice is an important responsibility that falls on the shoulders of optical office managers, optometrists, and practice owners. How do you strike the balance between being supportive and approachable for your staff while also prioritizing patient care and practice growth? We believe the secret to a strong staff management strategy lies in communicating change proactively, empowering staff to make expert decisions, and collaborating on creative projects. If office managers invest in and motivate their staff, they are already pioneering a positive office culture.

In this ebook, we'll cover hiring and training, skillfully addressing conflicts or difficult situations, creating actionable SMART goals for the growth of your practice and team, and smoothly navigating big changes in your practice. With the best leadership and structure, your staff will feel connected to the peaks and troughs of your practice.

HIRING & TRAINING

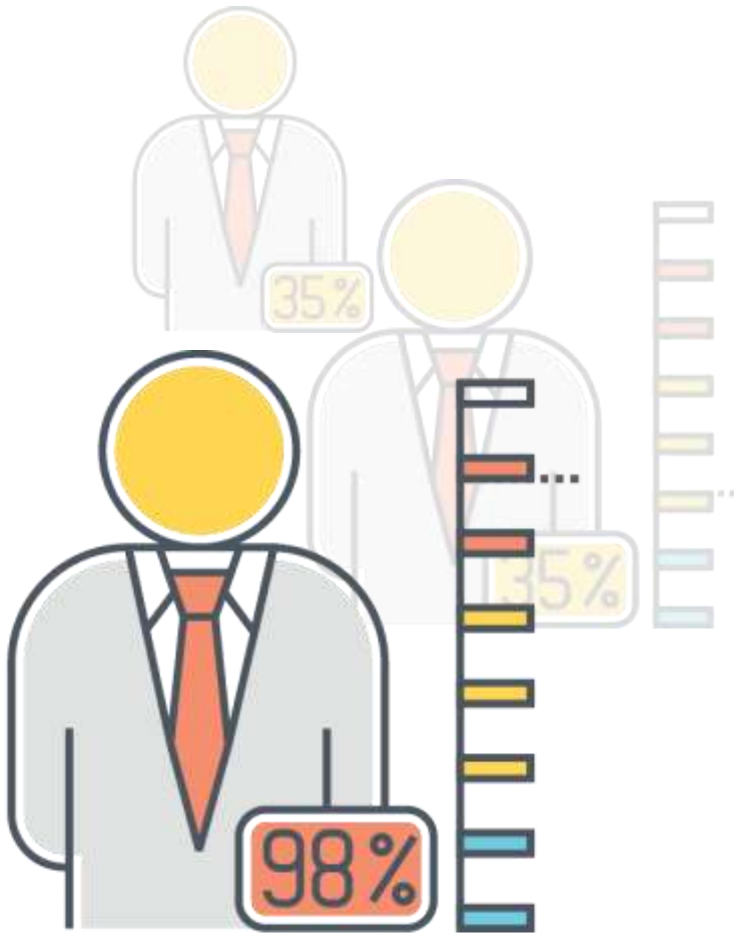
Interviewing is a high-pressure situation not just for the candidate, but also for the interviewer. In a short span of time, you need to evaluate a candidate's interpersonal skills, growth potential, technical prowess, and cultural fit with your optometry practice.

Keeping in mind that a thorough interview process can lead to fewer complications after you've hired the best candidate, we've applied the best hiring and training practices to eyecare professionals in this chapter.

BEFORE THE INTERVIEW

Create a list of skills required for the role as well as a list of preferred skills. From there, you can put the deal-breakers into a matrix where you can score the candidates' attributes. Each role in your practice will require a different set of strengths, but we think these are the top things to look for in each position:

- **Optician:** Proven sales experience will set good candidates apart from the rest.
- **Technician:** Delivers sound advice to patients without crossing boundaries.
- **Office Manager:** Project management and people management experience.
- **Optometrist:** Long-term goals that align with the practice.



BEFORE THE INTERVIEW

This is a good time to freshen up your practice's online presence, because candidates will be evaluating your business based on what they see online. After combing through the resumes and cover letters you receive, you can probably set aside about 10% of applicants for further review.

Prepare your questions based on how you want the candidate to structure their answer. Through behavioral or situational questions, you'll be able to understand how candidates react, organize, and make sense of different types of obstacles. For example, you'll want to ask questions that can be answered in a STAR method by detailing the **situation**, outlining the **task**, explaining what **action** they took, and reviewing the **results**. Here are a few STAR-based questions to start with:

- Describe a time you had to deal with a difficult patient. What did you do?
- In your role as (insert), could you tell me more about a process your streamlined?
- How do you handle unexpected situations or last-minute work?

You might also be interested in administering a personality test. These tests become increasingly relevant when you're hiring a manager, new OD, or if you're overwhelmed with qualified applicants. The **DISC Assessment** and **Myers Briggs Type Indicator** will help you see if candidates are a good fit with your daily routines, office pace, and the personal dynamic of your team.

AFTER THE INTERVIEW

Once you've gathered all the information you can on your top few candidates and there's no clear winner, it's time to consult the entire team. Your team will appreciate that you value their opinion on important hiring matters. The candidate is also likely to work well with the team if they've given a seal of approval. This is also the best time to call any references if they've been provided.

STAFF PERSONAS

When you're making hiring decisions, you should consider what your team is currently missing and how the candidate will fill that void. We believe that treating your staff like the experts they are is the first step in growing loyalty, enthusiasm, and mutual trust. Here are a few expert personas that you need in your practice in order to diversify your skills:

THE TECHIE

Techies are experts at identifying the best use cases for modern technology. They are up to date with IT trends and would help the staff adopt the latest technology, such as cloud-based software. You go to them for questions about the latest practice management system technologies and integrations as well as marketing your office online.

THE WATCHMAN

Watchmen are experts at understanding customers and providing the correct solutions. From answering the phone and scheduling appointments to greeting patients as they arrive and getting paperwork filed, they play an essential role in maintaining an efficient practice. Provide them a robust scheduling and administrative tool in a seamlessly interconnected PM solution.

THE TRENDSETTER

Your staff should have someone who is enthusiastically keeping up with eyecare retail trends in order to manage inventory and sales. They are experts when it comes to analyzing trends that suit your patient base. Provide them with reporting tools that can help them gain insights about your patients, such as best selling products for each persona, and they will be able to drive sales with product recommendations.

SALARIES

Setting salary requirements for staff positions involves a mixture of fair compensation, market value, and how much your practice can actually afford. We first recommend that you use the simple formula below to calculate gross revenue per staff hour.

$$\text{GROSS REVENUE PER STAFF HOUR} = \frac{\text{GROSS REVENUE}}{\text{TOTAL NUMBER OF HOURS WORKED}}$$

Based on this revenue, you can divide up the profits for each of your staff members. We've done the research on the national average salaries for each position to give you a good range to work from. However, these salary ranges don't take into account your local cost of living or corporate requirements. Check websites like Glassdoor, Payscale, and Review of Optometric Business to see what your competition is providing.

- Optometrist: $105-143k (varies based on employees vs partners/owners)
- Optometric Assistant: $21-36k
- Optician: $27-50k (dispensing vs licensed)
- Office Manager: $34-57k
- Billing Specialist: $30-48k
- Technician: $27-50k

TRAINING

ONBOARDING

Firstly, every optometry practice should have a clear onboarding process in place. Although this could mean the existing team member trains the new team member before leaving, this is not always an option. Therefore, you should carry documentation of all major responsibilities for each position on your team. Each task should have step-by-step instructions on what needs to be done, where all the materials can be found, the existing process, and any necessary login information.

The onboarding process might involve a walk-through, meet-and-greet with every staff member, crash course in the EHR and practice management platform, team lunch, and a fun exercise to wind down. Although it can take more than a few days, it's worth it to have the new hire shadow every staff member to know what their day-to-day looks like and help streamline any processes.

TRAINING

CROSS-TRAINING

Now that you've assembled and onboarded the dream team, it's beneficial that they understand a bit of each other's roles during emergencies or busy season. Cross training impresses patients, promotes collaboration and bonding, and adds variety to your work while reinforcing quality standards.

A Few Tips to Start Cross Training:

- Review your processes and identify which tasks can be taken on by others
- Identify who on your team has the skills and desire to take on new tasks
- Create a cross training plan and realistic expectations for the team
- Set training schedules during times with slower workloads
- Test your training by role playing patient encounters with team members once they have learned a new role or task
- Get feedback from your team to determine what's working and what you should change in the future
- Create a supportive practice environment so your team knows everyone is responsible for successes and failures

CONFLICT MANAGEMENT

Disagreements in the workplace can slow down your office workflow and add stress to your entire optometric practice. Even in the most efficient and collaborative practices, conflict is bound to arise. When conflicts occur among your staff, you have to resolve them quickly before they impact your entire team, your workflow, and your profits.

INTERPERSONAL CONFLICT

If you have employees who dismiss others, make snide remarks, and are generally difficult to work with, your entire staff may not feel comfortable working with them for long. Here are the steps that a manager could take to address any conflict or friction in their practice:

Listen To Both Sides

When your employees are in an argument, you need to pull the employees aside and give them a chance to tell their side of the story to uncover the reason for the feud and the desired outcome.

Identify The Cause of Conflict

Ask questions to dig deeper into the underlying cause of the conflict and rephrase their responses to clarify the situation. As you dig deeper, find areas of agreement and identify the most salient area of conflict between the employees.

Find A Solution

Consider the quarrelsome employee's desired outcomes when looking for a solution to resolve the conflict. After you have identified the cause of the conflict, determine what issues you can resolve, and develop a plan of action to work through the disputes. Propose your plan to the staff.

Document The Situation

Get your employees to agree and sign off that you have correctly described the situation and they approve of the proposed plan. Then, file the incident in their employee documents to refer to again later if the conflict isn't fully resolved or recurs.

TURNOVER

One of the main challenges optometrists have with their employees is high turnover. Whether it's front desk staff or opticians, we understand it can be hard to keep an employee for the long-term when competition is high in your area. Our best technique for combatting turnover is making your practice an irresistible workplace. Inject passion and enthusiasm into your team, discuss long-term plans, and involve them in the decisions you make.

If you're using the hiring techniques we outlined in Chapter 1, you'll want to hold onto the people you hire. Start them off with ample salary, benefits, and performance goals to get them excited to come to work and aiming to gain skills at your practice. Pay attention to your staff's concerns, opinions, and personal goals by meeting with them one-on-one at least every quarter. This encourages open communication and gives your staff a chance to discuss their job satisfaction.

CAREER GROWTH & COMPANY CULTURE

Many times, your optometry staff turnover rates are high because of a lack of advancement opportunities. To avoid this problem, try to align your staff with a career path. Investing in your staff by creating opportunities for career advancement can help motivate, grow your practice, and build loyalty. We'll review the infrastructure you can put into place to support your staff's growth.

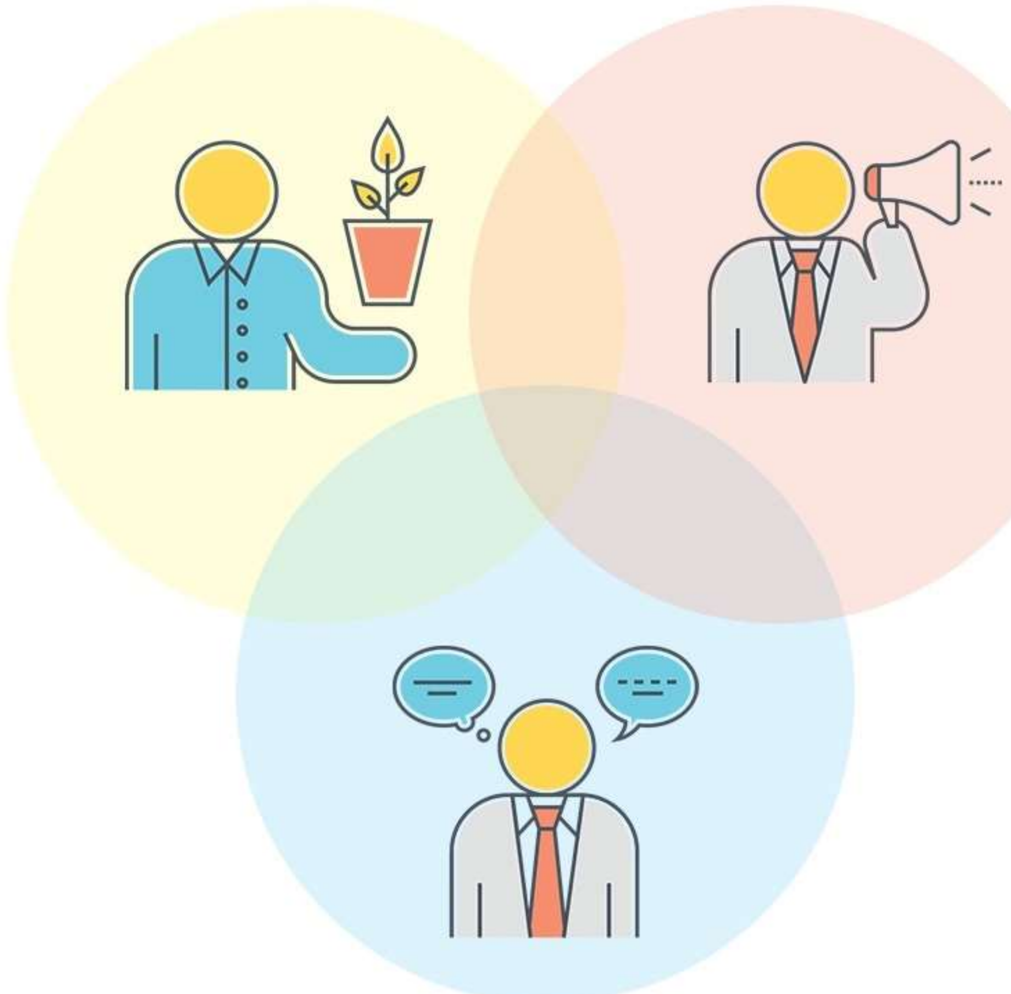
CAREER ADVANCEMENT

You can train your staff members to grow into the other, more advanced roles in your office. Start by walking them through the functionalities of your optometry software they aren't familiar with already. This way, you retain your great staff members by providing them with learning opportunities.

Then, you can provide mentoring or shadowing options for one hour a week or as long as you can allow. This helps staff members get a sense for what it takes to accomplish other roles in your office. If they do want to grow into a new role, they'll have a better idea of the skills and responsibilities they'll need to develop.

The following online certifications can also help advance your staff's career:

- CPOC
- CPOT
- CPOA
- CPO

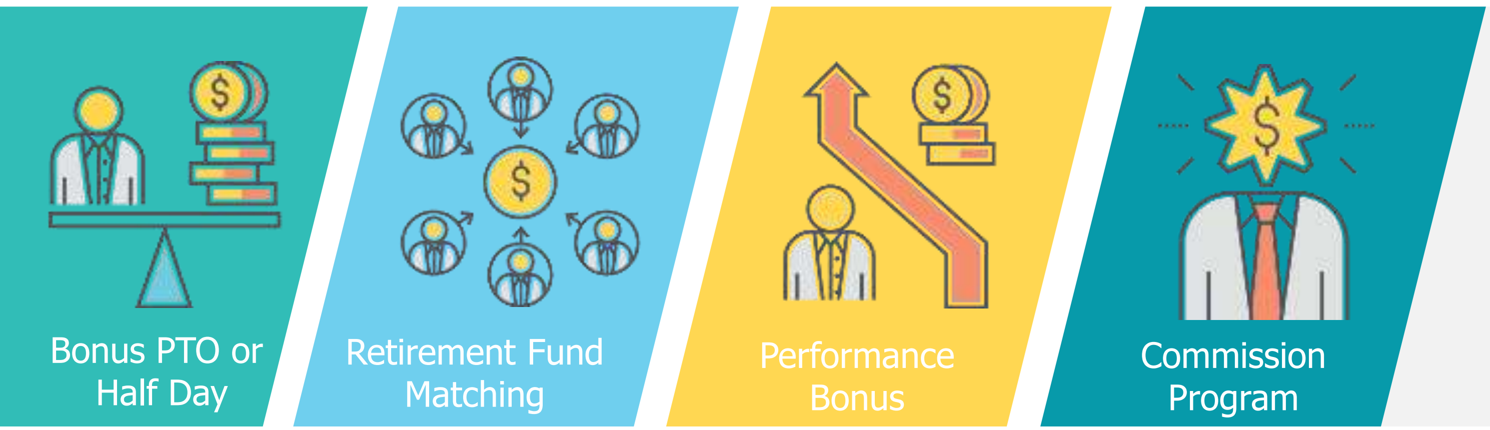


PRACTICE CULTURE

When we discuss the culture of your practice, we mean more than just the office snacks, perks, and events. Your practice's culture is defined by where you see the business growing, the types of people you hire, and your management style. We're talking about the overall tone of your marketing messaging, patient recall, and employee motivation. A defined practice culture helps you develop short and long-term goals for the practice and ensures that everyone on your team, as well as potential candidates, is on the same page. We recommend you create a mission statement and practice values with the input of your trusted team, but always make sure they align with your vision.

REWARDS & PERKS

When your staff has exceeded their quarterly or annual targets or successfully launched a new marketing campaign, it's a good idea to reward them for a job well done. Even a small perk can fuel your staff to invest more energy into their day-to-day duties, which can help reduce burnout and boost their dedication to the practice. However, there are many different types of rewards that could be appropriate. Here's a flowchart on possible rewards you can give to your expert staff members:



FREE IDEAS

- Employee of the month/public recognition
- Write a recommendation on LinkedIn
- Exclusive parking spot

PROMOTIONS

The best way to keep your staff loyal to you is through a promotion that recognizes their value to your practice and shows that you are invested in them. But how do you know its promotion time? Employees who showcase the following characteristics are probably ready for the promotion discussion:

Take on new challenges

They're willing to help others, innovative thinkers when necessary, and proactively fix issues within the practice

Possess people skills

Patients compliment them and fellow team members look to them for guidance

Execute higher level tasks

If you cross-trained your staff members, it's no wonder that maybe your opticians are turning into office managers or other role changes

Invest in practice goals

Showing interest in contributing to the practice's long-term goals means they prioritize the big picture

PERFORMANCE MEASUREMENT

The most difficult and worthwhile thing you'll do when it comes to job satisfaction is to create and track measurable goals. Without SMART goals for every individual team member, there isn't a surefire method to figure out which areas need improvement. **SMART** goals are **specific, measurable, attainable, relevant, and timely**. You can start developing annual individual goals by branching them off your annual practice goals.

For example, if your 10-year plan is to have three more practices under your umbrella, practice-wide goals could focus on patient growth and increased revenue. Furthermore, each employee's individual goals could be numerical targets they should hit each quarter to reach the revenue requirements for opening those new practices. Always discuss goals with the team members before solidifying them.

Download our goal tracking PDF here or print out the goal tracking sheet on the next page.

EYECARE PRACTICE

GOAL TRACKING SHEET

Employee Name & Title ______________________________

GOAL

Time Period: (Circle One) Month Quarter Semi-Annual Annual

____

Practice Goal

Individual Goal

Action Plan

COMMENTS

PROGRESS TRACKER

REVIEW

Date Completed ______________

Results

Challenges & Opportunities

Key Takeaways

CHANGE MANAGEMENT

One of the top concerns for any office manager or OD making changes in their practice is: how will the staff react? Hiring proactive people, setting up performance goals, and supporting your staff throughout their time in your practice lays a solid foundation for change.

However, you might encounter some resistance from staff who are comfortable with the processes and tools they've used for many years. In this chapter, we will address common challenges and concerns of implementing new technology, expanding, downsizing, and more.

COMMUNICATING CHANGE

When implementing big change in your practice, getting your staff's buy-in ahead of time can help reduce any possible friction. Show your staff exactly what areas of your practice will change and how they can prepare. Here are a few places to start:

Workflow

If implementing something will positively change your practice's workflow, let your team know. It can get them excited, especially if they've requested streamlining processes in the past.

Long-Term Vision

When creating your practice's annual or 5-year goals, you probably communicated the vision to your team. Let them know that this change is getting you closer to that vision of building a better, larger, or more robust practice.

Benefits to Employees

Of course, your employees will be more open to change if they understand how it specifically affects them. Create bullet points for each role in your practice to tell them how a new hire, new software, or other large change will affect their day-to-day duties and long-term goals. It's best to be transparent, even if the change increases their workload.

NEW SOFTWARE

Make sure your current software or prospective software meets your team's requirements. Get your staff's buy-in by listing out the pros and cons of the platforms you're considering and what you're currently using. Not only will you receive valuable insight into what will work for your practice, but your staff will also feel more connected and involved with practice decisions. Ultimately, there is less likely to be resistance to new software if the entire team agrees on the new platform.

TRAINING

In order to keep your staff focused on patient care and reduce administrative tasks, you should adopt a well-equipped EHR and practice management solution such as Uprise. Automated recall, billing and patient traffic reports, and optical dashboards are tools most of your team should be able to use within your HER and practice management solution.

However, training your team to use new tools or modern technology can be challenging when everyone starts at different baselines and needs to utilize different functionalities for their role. You also might be training new hires on your existing workflow, which is easier because they have the ability to shadow your existing employees.

TRAINING

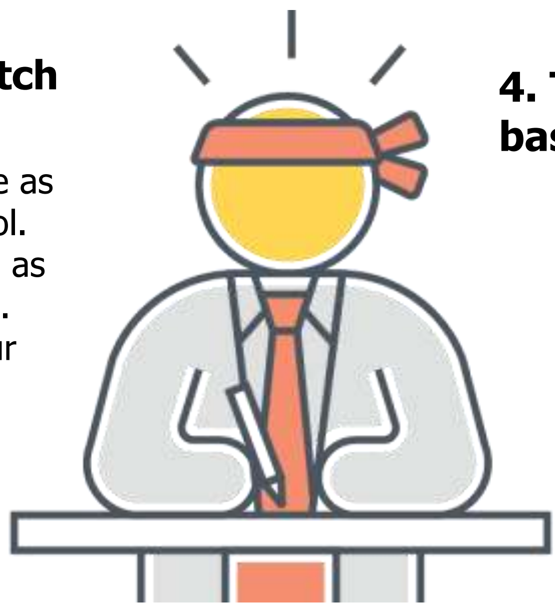
We recommend following these steps when it comes to training your staff on new software:

1. Use the implementation and training specialist to the fullest.

Ask the software vendor all the questions you might have before beginning training for your wider team. It's likely your staff will have similar questions and you'll want to make the most of your meetings with the implementation team.

2. Start training before you switch software.

You want to have as little down-time as possible when onboarding a new tool. Therefore, start the training as soon as you can and chip away little-by-little. Set a timeline for check-ins with your software provider before the go-live date.



3. Training videos and webinars are crucial.

If your vendor provides them, training modules accompanied with explainer videos, webinars, and Q&A sessions can be helpful. You can even create short quizzes for your staff during implementation to be certain they understand the software.

4. Train at home with cloud-based software.

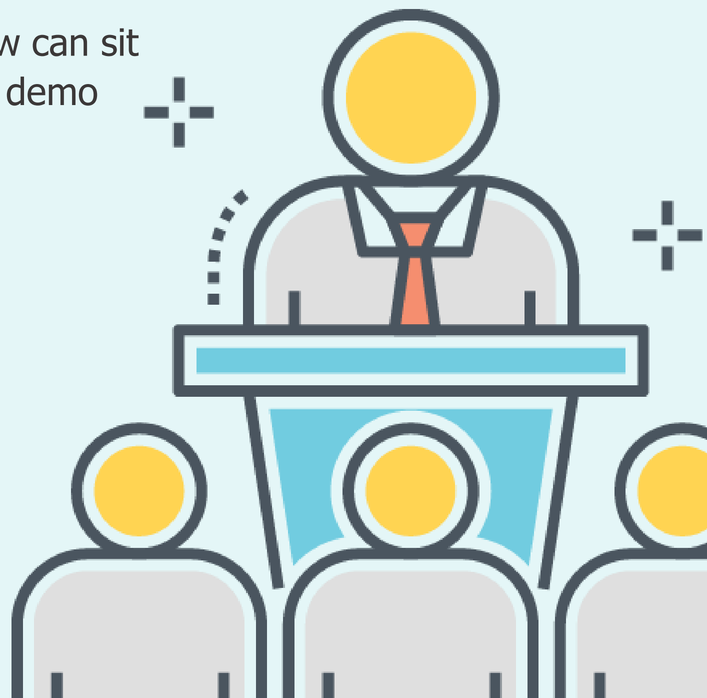
Having your staff continue their practice with the new system at home is only an option if your platform is cloud-based. However, it's beneficial because your staff won't need to take as many office hours to complete training.

YOU'RE READY.

Overall, you should develop a highly communicative staff of experts to provide true value to your patients and build a successful practice. It takes a true professional to understand people's motivations, address their concerns, stick to their values in times of conflict, and successfully navigate the waters of practice management. We hope we helped you improve your communication style, management techniques, and staff support policies.

We also think it's important to identify tools and technology your practice should acquire to implement necessary change and streamline your staff management. **Uprise** can help manage your practice while encouraging seamless communication with your staff and reducing time spent on administrative tasks.

From exam notes to patient records to order history, your entire workflow can sit in the **Uprise Practice Management & EHR** platform. Request a free demo below to see a software system your entire staff will love.



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