



Must Have's for COMPETENT STAFF MEMBERS....

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There are so many variables when it comes to staffing and staff competency. The very first question is how many staff members do I need? The second question is how much time will I invest in training them? Often in optometry, the answer to the first questions is, as few as possible and the answer to question two is as quickly as possible. Both those decisions will set you up for failure. I am asking you to re-think both and set a new course.

If you've read my articles in the past, you know there are three attributes of a successful employee:

Desire – You have got to hire people who want to do a good job.

Knowledge – You must train them fully. They need to understand WHY they are taking an action not just WHAT action to take. Make sure they think before they act.

Skill – If you want to do a good job and you know how, then practice makes perfect, a behavior will need to be repeated about 10,000 times to become an expert. How long will you give an employee to be competent? How long will that take?

Timeline to competence varies wildly based on individual skills but my suggestion is you double the length of time you currently think it will take. Plan on 3 months for basic competence for a front desk staff member, 15 months for an optician you plan to train from scratch and depending on the complexity of your technology 9 months for a technician. Again note there is a difference between competent and skilled.

Define each position by behavior patterns, how do you want the staff member to behave and what is the expected result? Communicate your expectations clearly, do not rush your message, and anticipate repeating this process a couple of dozen times before it starts to become habit for your staff. Then follow up with positive reinforcement or corrective meetings.

All Staff –

Define Optometry – this will take more than one brief paragraph. Include your team in all things amazing about our field. Continue to intrigue and amaze them with your most interesting cases.

Define Your Practice – What makes your practice special? Do not tell them quality care and educated staff, those are tired phrases repeated too often. Did you go into this field with that as your goal? What makes you passionate about what you do? Make sure your team understands that, your goal is to inspire them.

Front Desk

Appointment scheduling – What is the economic value to the practice of one scheduled appointment? How much revenue will be generated by that patient? We estimate one single call could be worth \$30,000 potentially. Does that make you re-think your front desk position? Is it worth investing in training?

Create a very specific list of behaviors you would like your front desk person to take with each and every patient. Then acknowledge a job well done, reward a full appointment schedule, a low no-show rate, a great pre-appoint capture rate. That should be the most basic checklist for competency at the front desk. Train for those skills, send staff to workshops on telephone techniques, communication skills, sales skills and any other development needs your individual staff member may need.

Assistant/Technician

Marketing! This should be the number one skills for your technician. They communicate the abilities of your clinical lane to the patient and can create a patient for life. Imagine yourself in a medical office, dental office or even a hospital, how do you judge each interaction? Did the staff member make you feel more comfortable and knowledgeable? Did they focus on you and your health? Did they perform a task? Were they robotic?

The technician position is so hard to hire for, the person has to have an analytic ability but also empathetic. We place a tremendous amount of effort into capturing new patients and growing the practice and then rush, rush, rush the patient. So often, when I consult with practices, this position is viewed as a support position to the doctor and the schedule. I'm suggesting you look at it from a marketing perspective, how can your technician communicate how amazing your technology is? What is the test being performed? Why do you have this done for the patient? How does it impact the patient's vision? Also, how are you incredible? Does that staff mention this to the patient? Too often, the goal is get them through to the exam room, remember each encounter can make the patient feel special and valued.

Determine what you want the technician to communicate, practice it, and praise them when they do it well. Consider sending them to a speaking class or an acting class in addition to customer service and communication. Then evaluate the competency of your technician on additional testing performed and patient retention.

Optician

The economic health of many practices are based sales in the optical area. This is often makes it easy to judge the competency of any optician but I'm asking that you go out beyond that limited perspective and look for patient connections as they real judge of an opticians competence. There are a lot of sales people who can hit a goal, but can they make that patient feel special? Can they communicate technology and value or just insurance coverage?

Take the time to train your optician on more than just product specifics, confirm that they understand what is best for the patient and can adapt their presentation to suit the patient need. Then set up case studies and then allow them to present to you what products and services they would offer those patients. Remember there is often more than one right answer and the hope is you can praise and reinforce a job well done. If your optician cannot perform at this level, then the trainer not the optician is the one to re-evaluate.

Plan for this to be an ongoing process, treat your staff the way you treat your patients, give the time and consideration and the result will be a healthy practice economically and an enjoyable place to work.

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