

***BASICS FOR YOUR PRACTICE***  
*Creating Organization and Order*  
*Second in a series*

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Have you taken the first step? Did you take some time and review the basic economics of your practice? If so, you're now ready for step two. Spring cleaning! It's time to create order and organization.

Just like cleaning out the garage or starting on the yard work, now is the time to critically assess you staff. In today's employment market, there is no need to compromise on any employee. Do you have the best people in the position to perform their jobs? Do you have the right person in place to maximize each staff member? Have you trained them appropriately? Do you pay them a living wage? Does your office manager enforce policies and keep employees focused and on task?

Place an employment ad on Craig's List, Careers.com or your preferred employment vendor and gather resumes. There are a lot of qualified people who are looking for a good job right now. Take advantage of this time.

The most important factor in having an orderly, organized practice is an effective office manager. Do you have a "true" office manager or a "working" office manager? A "true" office manager is one who is devoted to running the practice and the staff. Not a person who is the "fall guy" when things go wrong. Neither should he or she be the opticians or insurance biller. The office manager represents you in the front of the practice. It is his or her role to keep the office and staff at utmost efficiency levels while moving forward.

Most doctors appoint the person that they find easiest to work with to this position.. This is a mistake. You want someone who will challenge the status quo and who isn't afraid of a difficult task. They must be able to implement policy changes, convert to EMR or discipline a problem employee.

Be prepared to invest in your office manager. No one is born with the skill to manage people and run a practice. They need training and assistance. Send them to PEN's ([www.primaryeye.net](http://www.primaryeye.net)) Office Leaders series. This will help them understand the basic role of an office manager in an optometric practice, plus it allows them to network with other office managers in successful practices. Just as you benefit from getting together with colleagues, so will your manager. Also have them attend leadership seminars from non-optometric organizations to learn business essentials. Skillpath ([www.Skillpath.com](http://www.Skillpath.com)) is a national organization and it provides a series of topics with strong business foundations.

It may take a year or more to fully develop your office manager but remember, you're on the 10-year plan. Don't focus on only today, tomorrow or next week, but on the lifetime of your practice.

Once your manager is trained and competent, it's time to delegate all staff and business responsibilities to them. Hiring, coaching, counseling, discipline and termination should be within their duties. Giving raises, promotions or demotions are all within their purview along with internal business office decisions.

Their first step is to meet one-on-one with each staff member and discuss their performance, skill set and the expectations of the practice. Begin with a written performance appraisal (available through [mary@eyesystems.info](mailto:mary@eyesystems.info)). The appraisal must be real-world, focused on positives and goals. While negatives should be addressed, avoid dwelling on them. State their areas of growth and expectations and develop a timeline to achieve them.

The second step is to coach and counsel each staff member toward those goals. This may mean daily check-ins if an employee is not cooperative. You can also provide weekly written reports to confirm that the goals are being met. The only way to have a well-run, organized practice is to steer and direct it in the direction you want to go. If allowed to flow unsupervised, staff can pull in opposing directions.

If someone does not adapt to the new environment, your office manager may need to reassign their duties or demote them. Stay out of their way. Most of your time is spent in the exam room with patients so realistically; you are unaware of what happens in the other areas of the practice.

Lastly, do not be afraid to terminate a bad employee. I am shocked at how often a doctor will not confront or terminate a consistently underperforming staff member. Often, the most difficult employee is left alone because they are unpredictable or potentially disruptive. But while you're in the exam room avoiding the situation, the remainder of the staff faces a daily dilemma of dealing with this difficult person. What I see regularly are good, quality employees who leave because the "crazy" staff member is being accommodated and the work environment becomes intolerable. This does far more damage to your practice than terminating an employee. Make sure all the documentation for termination is in order and allow your office manager terminate. It's never easy but very often necessary.

As employer your role is to be the positive influence. Acknowledge the good employees; encourage them to become great employees. Lead by example. If you love what you do and communicate that, your staff will follow. Create an environment where people want to grow and do their best, then get out of the way. Organization, order and a positive place of employment will bloom. Just in time for spring.