

Three P's:  
People, Product and Process

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Phernell Walker, MBA, ABOM, NCLEC, LDO  
Renowned International Speaker

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PURE OPTICS

Optometric Strategy	Business Operations	Ophthalmic Education
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**Phernell Walker, MBA, ABOM, LDO**



- ❖ Principle | Pure Optics LLC
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- ❖ American Board of Opticianry | Board of Directors
- ❖ Pacific University College of Optometry | Former Adjunct Professor
- ❖ Master in Business Administration (MBA)
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- ❖ Licensed Dispensing Optician (WA-LDO)
- ❖ National Contact Lens Examiners Certified (NCLEC)

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SCAN ME

### Contact Information

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### Mission

Why does your practice exist?

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### Why do you align with its cause?



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### Core Value Examples

-  **Integrity** - Acting with strong ethics is a priority for everyone representing the organization as well as the company's behavior as a whole.
-  **Honesty** - It's not just the best policy. It's a core business practice to act in a transparent, trustworthy manner that earns the respect of colleagues, customers, and the public.
-  **Fairness** - Treating everyone with the common decency we all deserve and expect.
-  **Accountability** - Accepting responsibility for your actions (and inactions) is the ultimate way to build trust internally and externally.
-  **Promise to Customers**. Creating a great customer experience begins with staying true to the words we speak and the bonds we make.

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### Core Value Examples

-  **Diversity and Inclusion** | Organizations succeed by bringing different lived experiences and a range of backgrounds into a shared environment where everyone has equal opportunity.
-  **Learning** | No one has all the answers. A culture of humility and continuous learning is a bedrock principle of successful companies.
-  **Teamwork** | When people work together, they can create something greater than themselves as individuals.
-  **Passion** | Having a joy not just for the work itself but also the people around us, so that everyone can be bold, innovative, and creative.
-  **Quality** | Companies are judged by the craftsmanship of their products and services, so the highest standards must be maintained.

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What are your practice's core values?

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### What Category Represents Your Challenges?

People	Product	Process	Resources
Employee Satisfaction	Patient Satisfaction	Scheduling Patient	Optometric Equipment
Front Desk	Services	Policies	Computer Technology
Billers	Frames	Inventory	Training
Technicians	Lenses and Treatments	Billing & RCM	Field Mgmt. Support
Opticians	Contact Lenses	Patient Retention	Marketing
Optometrists	Pricing	Capture Rate	Procurement
Managers	Quality	Other	Other

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### What Category Represents Your Challenges?



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### Practice Areas by Patient Journey

External Facing	Front Office	Pretesting	Exam	Dispensary	Billing	General
Patient Engagement	Training	Training	Scope	Product	Claim Scrubbing	People
Appointments	Equipment Needs	Equipment Needs	Equipment Needs	Merchandising	Claims Processing	Soft & Hard Skills
Website	Process	Process	Charting	Pricing	EOB	Resources
Signage	VSP Integration	Physical Space	Coding	Sales Tools	Reconciliation	Technology
Access	Payment Management	Undocumented processes	Workflow	Inventory	Statements	Software
Hours of Operation	Other	Other	Support	Quality	Claims Processing	Goal Setting

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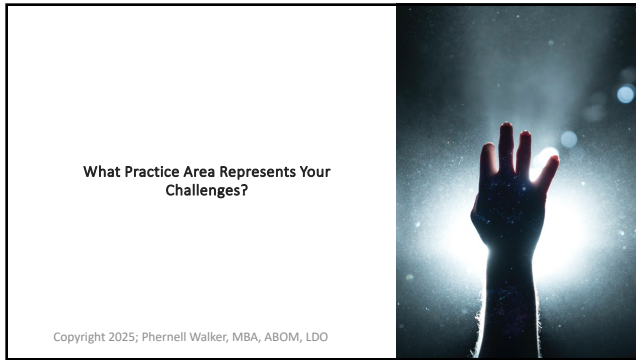
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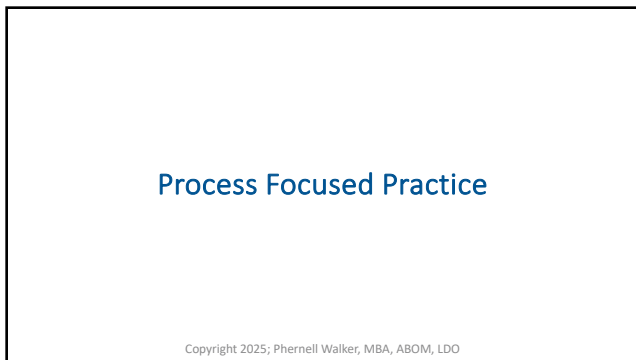
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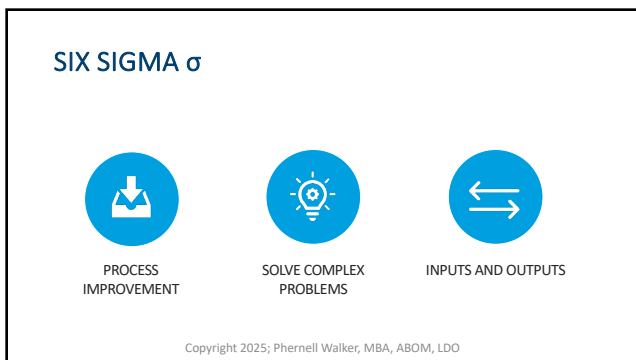
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Usage

- Methods
- Equipment
- People
- Products
- Measurement
- Environment

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Seek to Eliminate Work Variation

Every new process introduced in the patient journey creates variation.



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DMAIC

- Define the Problem
- Measure
- Analyze
- Improve
- Control

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### Trapped Value

What is trapped value?



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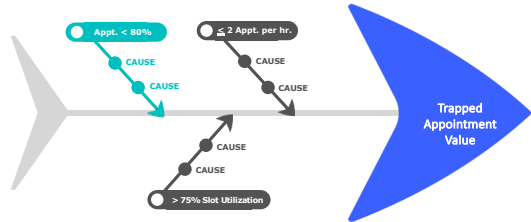
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### Fish Bone



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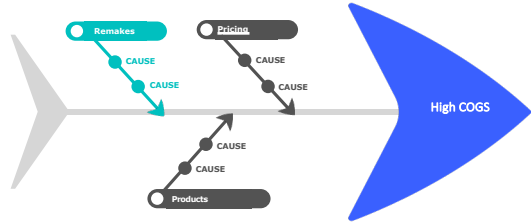
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### High COGS



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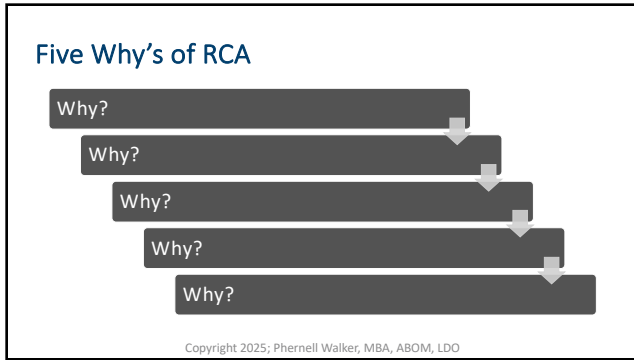
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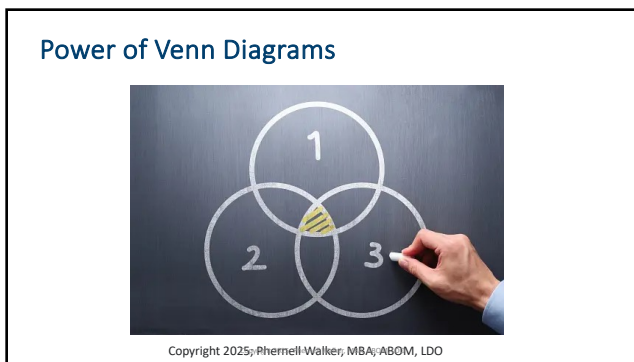
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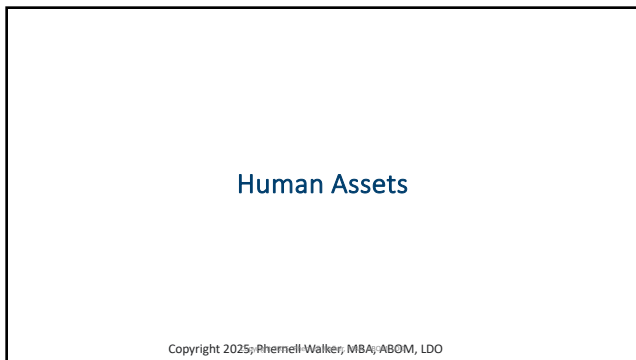
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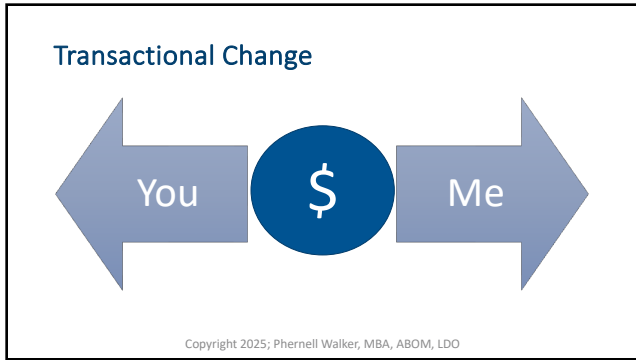
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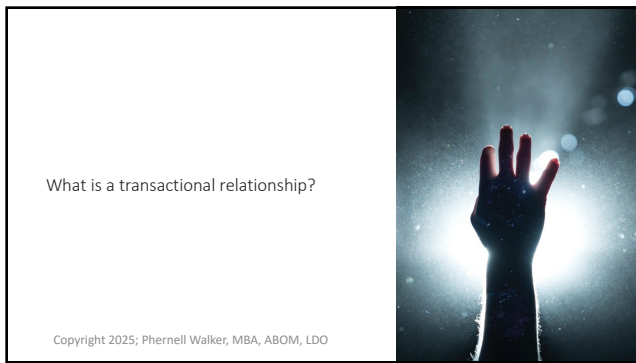
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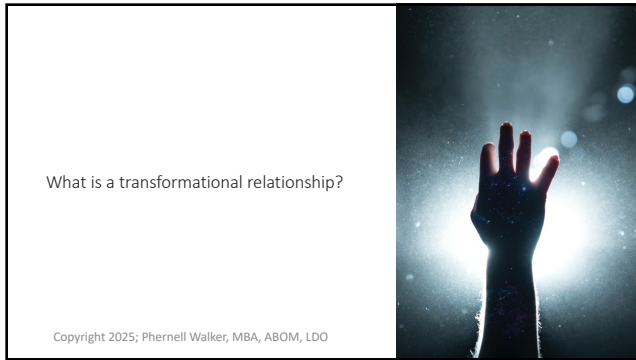
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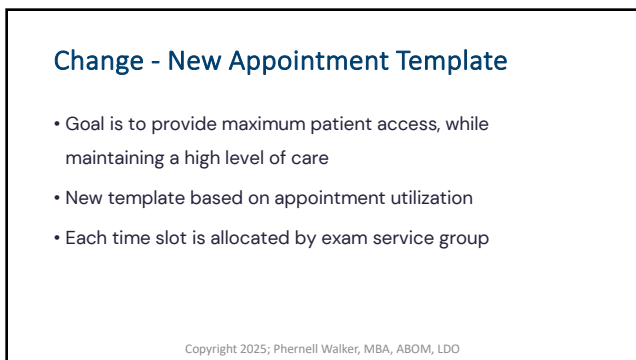
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### Appointment Utilization

Time	Exam Type	Notes
9:00 am	Comprehensive Exam	
9:20 am	Simple Exam (i.e., post-op, follow-up, emergency, red eye, etc.)	
9:30 am	Comprehensive Exam	
9:50 am	Simple Exam (i.e., post-op, follow-up, emergency, red eye, etc.)	
10:00 am	Comprehensive Exam	
10:20 am	Simple Exam (i.e., post-op, follow-up, emergency, red eye, etc.)	
10:30 am	Comprehensive Exam	
10:50 am	Simple Exam (i.e., post-op, follow-up, emergency, red eye, etc.)	
11:00 am	Comprehensive Exam	
11:20 am	Simple Exam (i.e., post-op, follow-up, emergency, red eye, etc.)	

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### Appointment Non-Utilization

Time	Exam Type	Notes
9:00 am	Exam	
9:20 am	Exam	
9:40 am	Exam	
10:00 am	Exam	
10:20 am	Exam	
10:40 am	Exam	
11:00 am	Exam	
11:20 am	Exam	

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36

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### Process



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### Force-Field Analysis

Driving Forces	(1 to 5)	Change Proposal	(1 to 5)	Restraining Forces	(1 to 5)
Total		Total		Total	

Driver →      ← Restrainer

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38

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### Take Aways

- Fast-forward to 2030. What are three entirely new businesses that will emerge in your industry from technological developments that you can identify today?
- Abandon what is about to be obsolete, develop a system to exploit your successes, and develop a systematic approach to innovation.
- Set up a systematic process of reviewing all products, processes, and services.
- Practice laser like focus on your diverse patient personas to deliver products and services they value.

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### RACI Charting

			
RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED

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### RACI Charting

Role	Details
Responsible	Team members are the actual executors of the tasks. One or more team members are responsible for delivering the assigned tasks.
Accountable	Delegates, approves, or vetoes decisions. This person is usually in a leadership position and is responsible for setting realistic expectations and timelines.
Consulted	Affected by the outcome of change and provide inputs and feedback to improve the business processes. The consulting members can be individuals from the same team or related departments
Informed	External stakeholders or different teams need to be informed on project changes, progress, and deliverables. These members aren't the decision-makers, so they are unaware of the details but are in the loop on a need-to-know basis.

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42

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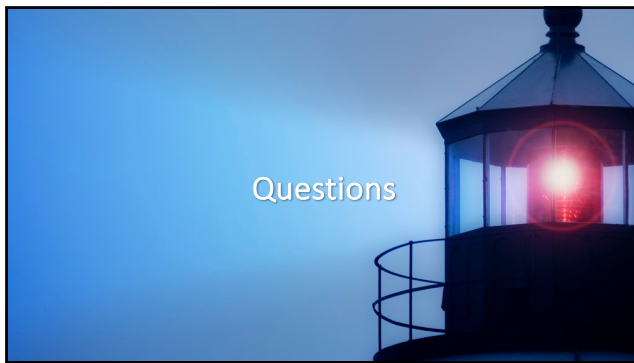
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