

COURSE OUTLINE FOR COPE ACCREDITATION

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- **Venue:** Vision Expo East (April 2022), Vision Expo West (September 2022)
- **Title:** Practice Make-Over: Out with the Old, In with the New
- **By:** Julie Helmus, OD
- **Course Description (35 words or less):** so you bought an old practice, or you're in need of a make-over. Tips on how to modernize from a millennial who gutted a thirty-year-old practice.
- **Course Objective:** Inspire private practice owners to scrutinize and revamp their website, EHR, phone systems, patient flow, staff org chart, vendor relationships, interior design, contracts and more.
- **Course Category:** Practice Management
- **Course Format:** Live CE (expires in 1 year)
- **Lecture Hours:** 1
- **Disclosure of financial/proprietary interests:** Dr. Julie Helmus has no relevant financial relationships to disclose. The content and format of this course is presented without commercial bias and does not claim superiority of any commercial product or service.

OUTLINE:

HOW TO REVAMP AN OLD PRACTICE:

STEP 1: PREPARE FOR THE MAKE-OVER

1. Staffing:
 - A. Attitude: asset or expense?
 - B. Existing Staff:
 1. Expect up to half will leave
 2. Consider Retention bonus at 1 year
 3. Referral bonus for employees who bring in a successful new hire
 - C. Set up "Career Page" on website
 - D. Start interviewing right away
 - E. Consider the role of Executive Assistant to help implement changes
2. Assemble a Team of Advisors:
 - A. Legal
 - B. HR
 - C. Consultants:
 1. Large Groups
 2. Small Groups/Individuals
 3. Alliances with Consulting Services
 - D. Financial: bookkeeper, CPA
3. Get your Financial "Ducks in a Row"
 - A. Know your Credit Score!
 - B. Line of Credit for Business (helpful if you use a local bank)
 - C. Personal Line of Credit (HELOC)

- D. Maximize credit limit with business and personal credit cards
- E. Low-interest loans as needed for renovations
- F. Low-interest loans through equipment vendors
- 4. Name Change
 - A. A slow and tedious process
 - B. Outsource to firm or appoint to one organized staff member
 - C. Start with IRS, Secretary of State and Insurance Plans
- 5. Vendors:
 - A. Know where your money is going
 - B. Sit down with largest bill first: CL supplier, Lens Labs, Frame Buying Groups

STEP 2: STAFFING - BEFORE AND AFTER

1. Staffing:
 - a. Questions to ask yourself: do your staff have room for growth? Do they understand their role? Is there task ownership? Do they know who to go to when issues arise? How many performance evals do you want to conduct a year?
 - b. Before: 16 staff and only 2 teams: "Techs" or "Admin"
 - i. "Admin": chaos, masters of none. pre-testing, phones, charts, posting, billing, CLs, etc.
 - ii. High turn-over, toxic culture, hierarchy, no cohesion or teamwork.
 - c. After: specialization and silos
 - i. 7 teams: Optical, Front Desk, Clinical Techs, Billing, Operations, CLs, Doctors
 - ii. Team leads → Leadership team
 - iii. More specialization within Admin team: call center, schedule coordinator
 - iv. More upward mobility available to existing staff
2. Internal Communication:
 - a. Questions to ask yourself: is everyone on the same page? Do staff understand your vision/direction for the practice? How are updates, protocols, and changes disseminated? When does your team have the opportunity to make suggestions, brainstorm and bond? Are your staff involved in goal setting and comfortable with metrics?
 - b. Before: no meetings, occasional email about errors to avoid, old owner would go from staff to staff to spread the word
 - c. After:
 - i. Weekly emails: Monday "All Staff Memo"
 - ii. Close office 1 hour on Tuesdays for weekly 45-minute in-person team meeting
 - iii. Leadership Team:
 1. Monthly Leadership check-ins
 2. Annual January Goals meeting
 3. Annual June weekend "Innovation" retreat
 - iv. Quarterly Doctor meetings

STEP 3: SYSTEM BY SYSTEM - BEFORE AND AFTER

1. Metrics:
 - a. Questions to ask yourself: is your practice growing, constricting or stagnant? Do you have the right staff-to-doctor ratio? Are your Associates producing? When should you hire

- an/another associate? What's your CL/spec lens/frame capture rate? How does your business compare to others in your region? Nationally? To itself last quarter/year?
- b. Before: hand counting only 1 metric. Many unknowns!
 - c. After: Glimpse and EdgePro metrics software
2. Email:
 - a. Questions to ask yourself: is your email HIPAA compliant? Is it set up to withstand staff turnover so patient communications don't get lost?
 - b. Before: Webmail and gmail for doctors
 - c. After: Outlook for everyone. Instituted: support@helmusoptometry.com email address
 3. Credit Card Merchant switch:
 - a. Questions to ask yourself: are you leveraging your practice history and sales volume for the best rate? Do you have touch-free payment options? Can you accept ApplePay, Venmo, Paypal etc?
 - b. Before: MerchSolutions 2.7% fees, single wired device
 - c. After: Clover 2.1% fees, three portable devices.
 4. Onboarding:
 - a. Questions to ask yourself: are you making a good first impression with new hires? Is your onboarding process consistent? Are you providing necessary state-mandated new hire paperwork? How are rules and policies effectively communicated to new staff?
 - b. Before: paper packets
 - c. After: electronic checklist, sexual harassment and HIPAA done at home prior, Offer Letter sent and signed electronically through Gusto payroll provider, appointed onboarding "buddy," schedule for shadowing all departments
 5. HR:
 - a. Questions to ask yourself: are you following all wage and hour laws? How do you protect yourself from claims?
 - b. Before: OD Owner as "HR department" between patients
 - c. After: HR California by Cal Chamber, Alternative Work Week schedule
 6. Legal:
 - a. Questions to ask yourself: what's your plan if sued by an employee or patient? Who will you turn to for guidance during a VSP audit or State Board compliance accusation? Are your contracts up to snuff?
 - b. Before: none!
 - c. After: Craig Steinberg, OD/JD concierge client
 7. Marketing:
 - a. Questions to ask yourself: who is your target audience? Who is your competition? What's your ROI for various marketing campaigns? Do you have a marketing budget?
 - b. Before: print advertising in local paper
 - c. After: billboard on Highway 80, old-school postcards to target patients, free Nextdoor ads, specific-demographic targeted Google and Facebook Ads, 30 Plus Club, BFF Club, Seasonal Frame Shows.
 8. Log Ons:
 - a. Questions to ask yourself: are your passwords secure? Easy to access? Accessible in and out of office? How much time do your staff spend searching for log on information?
 - b. Before: mess!
 - c. After: Beautified color-coded shared Log-Ons document, standard internet favorite bar

9. Phones:

- a. Questions to ask yourself: How many phone lines do you have? Do you have remote phone capability? Can you text patients? Can your patients pay their bill via text?
- b. Before: 4 phone lines on Avaya discontinued phones. No texting.
- c. After: 25 Weave phones, VOIP, unlimited lines, remote workers, cell phone.

10. Website:

- a. Questions to ask yourself: does your website reflect your brand? Is all the information accurate and up-to-date? Are website views being converted into action (i.e patients calling and scheduling)? What does your website look like on a smartphone?
- b. Before: gray, dreary, unloved
- c. After: check it out! www.helmusoptometry.com

11. Payroll:

- a. Questions to ask yourself: how well does your employee time tracking sync with your payroll processor? How easy are custom reports to access? Can your staff access their tax documents and pay stubs? What more can you hope for from a payroll provider?
- b. Before: Paychex
- c. After: Gusto!

12. IT:

- a. Questions to ask yourself: how stable is your IT infrastructure? How are you backing up your data? What plan do you have in place if your server dies? Who handles day-to-day issues and updates?
- b. Before: 10 computers each with own settings, former OD owner would come in on a Sunday when updates were required. Printers a mess.
- c. After: new server environment with 4 hour up-and-running insurance policy. Wiring for stability: each printer/phone/computer has its own port. 25 work stations. Remote IT firm with a team of experts available 24-7. Issues resolved with a "support ticket" sent via email.

13. Utilities:

- a. Questions to ask yourself: if the internet goes out, can you still see patients? Can your staff still work? What do you do in the event of a power outage?
- b. Before: frequent internet outages would require that we cancel patients and send staff home.
- c. After: two different internet providers for redundancy and no down time!

14. Physical Space:

- a. Questions to ask yourself: is the paint, décor, furnishings and equipment consistent with your brand? Do your facilities, from landscaping to exam room, help you attract and retain patients and staff? How wheelchair-friendly is your office? Can you implement a circular flow? Are you maximizing your square footage for revenue-generating activities?
- b. Before: Doctors worked in one exam room, no admin space, no staff lounge, lab deliveries piled on optician desks, 5 admin sitting together ("so many staff!" comments from patients, excess socializing), patients unable to locate reception, peach paint. (photos)
- c. After: Upstairs expansion, remodel, 6 exam lanes, 2 new optical desks, shipping and receiving room, spa room, dedicated room for NCLE etc. (photos)

15. Staff Benefits:

- a. Questions to ask yourself: how well are you taking care of your most valuable asset? Can your employees build wealth alongside you? What's the greatest gift you can give your staff? (TIME!) Is your team motivated to sell and grow the practice?

- b. Before: 10 days sick/vacation combined. No health coverage. 7 holidays. Unpredictable schedule with Saturday requirements. Matching 401k.
- c. After: 6 paid sick days, 9 paid holidays, 80-120 hours PTO accrued, QHERA health insurance reimbursement, matching 401k, professional development, set M-F schedule, \$300 uniform coverage. Employee lounge with TV and massage chair. Bonus system for Optical Manager and Operations Manager. Team games with rewards.

16. Security:

- a. Questions to ask yourself: how safe are your inventory, medical equipment and medical records? Can you set your office alarm from your cell phone? Can you see what's going on in the practice remotely?
- b. Before: 4 black and white video cameras accessible from one computer. No way to check if alarm was set.
- c. After: spreadsheet of different codes, 16 color cameras inside and out viewable from my cell phone, activate and deactivate alarm from cell phone, front door roll-down security door, safety training by local PD, linked into downtown network for greater neighborhood monitoring.

17. EHR:

- a. Questions: server or cloud based? How much of your patient paperwork is electronic? Could a more efficient EHR save you staff time?
- b. Before: OfficeMate
- c. After: CrystalPM

CONCLUSION: WHY IT'S WORTH IT

1. If you aren't evolving, you're stagnant or out-of-date
2. Even the 1% matters
3. Wow patients; stand out, create "brand" loyalty
4. Easier to attract top talent; even during "the great resignation," staff want to work here
5. Higher practice re-sale value
6. Set up your practice so it works for you
7. Necessary steps to progress from OD to CEO to Business Owner
8. Pride and joy!