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## Taking Care OF Business



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### Overview

- Define unfinished business
- The effects of unfinished business
- Causes of unfinished business
- Ways unfinished business can be prevented



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### Most Offices

- Have dedicated staff members
- Have committed leadership
- Have a great desire to do a good job
- Are under resourced
- Lack formal training programs
- Lack leadership training
- Lack formal policies and procedures



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### Visible Leadership

- Provide Guidance
- Protect the resources
- Lead People
- Manage programs
- Accept responsibility
- Hold people accountable
- Analyze processes
- Redirect processes
- Communicate



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### Define unfinished business

- Matters that have been postpone, matters that are pending, matters that are necessary to the business at hand
- Things that really need to be done by someone and is pending and incomplete



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## The effects of unfinished business

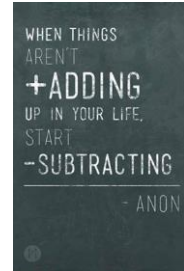
- Unresolved task/process completion
- Creates environmental chaos/ is contagious
- Dealing with the results of not having the tasks accomplished
- Revenue impacting



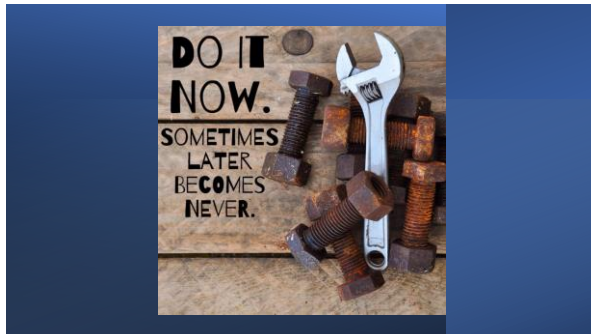
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## Effects cont...

- Confusion on why if the task was so important, why it didn't get accomplished
- Compromise on values
- Low morale
- Breaches in trust



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## Causes of Unfinished Business

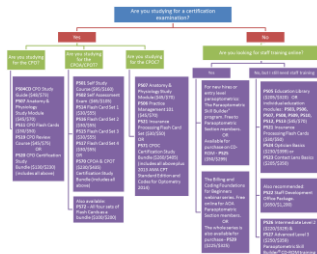
- Lack of Training
- Lack of Resources
- Poor Timing
- Uncontrolled circumstances
  - Personnel
  - Emergencies
  - Business
  - Patient care issues
- Poor planning



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## Process Analysis

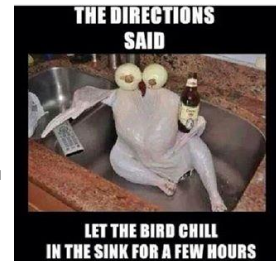
- Processes must be:
  - Clearly defined and written down / referenced
  - Adequately resourced
  - Constantly monitored
  - Adjusted when necessary
  - Reported to leadership



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## Change Management

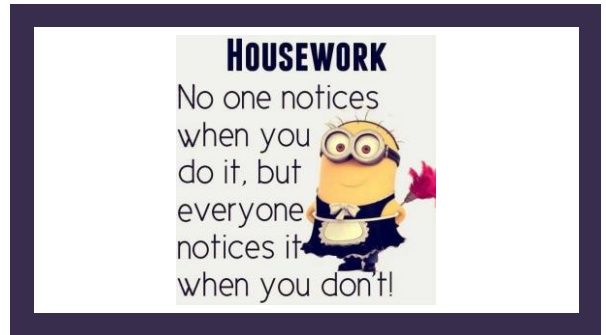
- Every office has change
- Planned change is important
- Staff buy-in is critical
- If the staff owns the process, it will not fail
- Leadership must be visible and involved
- Monitoring and reporting is vital



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Samples of Unresolved Tasks

- Spectacle or Contact Lens Orders
- Scheduling appointments
- Scheduling of personnel
- Customer complaints and follow-up actions
- Leadership and employee feedback



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Ways Unfinished Business Can Be Prevented

- Appointed leaders
- Get organized
- Schedule everything
- Prioritize all tasks
- Keep a list
- Establish timelines
- Build buffers
- Adequate reporting
- **Close the loop!**



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Too Many Starts

- When you are a people pleaser, you don't know how to say no
- Easily overwhelmed
- Completion rate decreases with multiple starts



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Leaders/Supervision

**YOU DON'T BUILD A BUSINESS**  
**YOU BUILD PEOPLE**  
**AND THEN PEOPLE BUILD THE BUSINESS.**

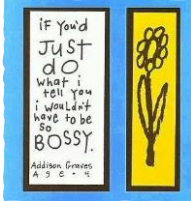
- Visibility
- Assist in Establishing Priorities
- Communication
- Proper Coordination
- Proper Record Keeping
- Provide checklist (include the people in making it)
- "30 Seconds of Success"
- Written performance feedback

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## Keeping & Meeting Deadlines

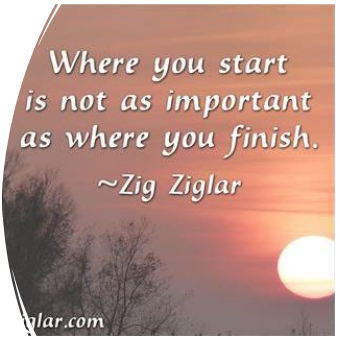


- Communication is a cornerstone for success
- Meetings are critical
- Must have a purpose
- Outlined and recorded
- Minutes must be reviewed for clarity
- Suspense's and deadlines must be met or clarified

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## Intents

- Your intent is to complete the tasks, but without a plan you will either waste time and fail to complete your tasks.
- Benjamin Franklin, "failing to plan, is planning to fail"



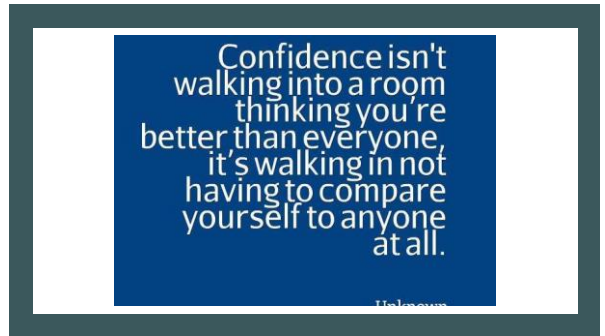
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## Accept Criticism

- Criticism is not always negative
- Perspective is critical in completing tasks
- Don't allow criticism be the excuse that prevents you from completing your tasks



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## Resource Management

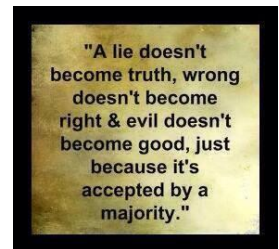
- Proper resources allotted to accomplish the required task
- Materials and manpower must be considered prior to implementation
- Adjustments are critical



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## Resource Management Cont...

- Time must be allowed to complete the task examples: EHR, compliance programs
- Don't ever expect staff to work off the clock, if you know they are, address it in writing
- Pay them fairly



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## Never Say No?

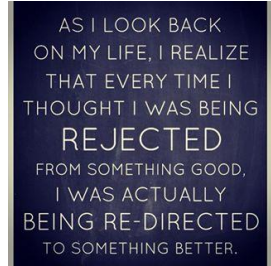
- Professional relationships with the boss
- Some bosses hate being told no
- Never Say No, give options
- Allow the boss to choose the option
- Document. Document, document
- Provide feedback before the deadline if unable to meet it



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## Execution

- Nick Saban's Keys to winning!
- Failure is not an option
- Have a plan
- Know the plan
- Stick to the plan
- Make adjustments to the plan (in writing) as needed
- Communicate changes to entire staff
- Report the effects of changes to the staff



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## Position Descriptions

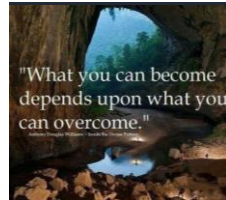
- Affords staff a reasonable opportunity to know their job expectations
- Must be reviewed and modified annually by the leadership
- Must be reviewed by the staff member



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## Proper Training

**When you base your life on principles, most of your decisions are already made before you encounter them.**



- Assigned trainer
- Documented training
- Have a formal training plan (written)
- Training progress report
- Training feedback
- Training completion celebration
- Certification

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## Feedback

- Why is it necessary
- Providing Feedback
- How feedback assist in accomplishing tasks
- Assist in identifying breakdowns in processes or people
- Provides direction, reflection, and motivation



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## Critical Areas That Cost

- Customer Service
- Staff unity
- Compliance programs
- OSHA
- Infection Control
- HIPAA
- Medical Fraud
- Meaningful Use



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## Life Is Tough

- Because what you doing is difficult doesn't mean that you can NOT do it
- Completing your objective is not a question
- What needs to be done
- 800mg of Suck it up



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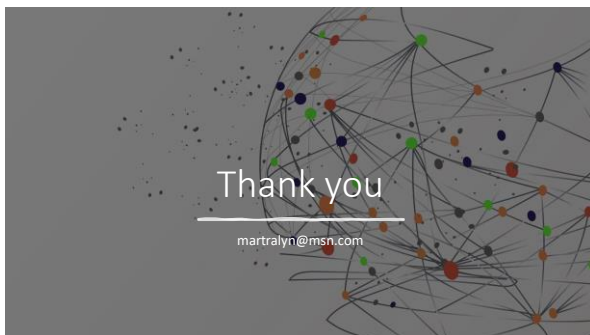
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## Review

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