



# *EyeSystems*

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# 8 Steps That Will Elevate Your Team

Require Annual Education

Have a Development Plan

Meet One-on-One Regularly

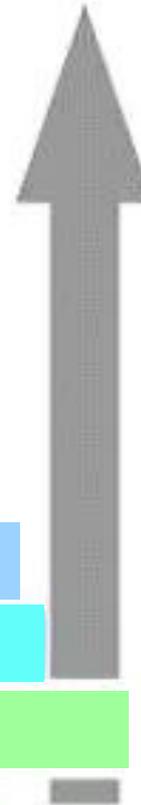
Support Practice Knowledge

Invest in Training & Certification

Encourage Active Listening

Empower People

Hire Problem Solvers



# 1. Hire Problem Solvers

- Ask Questions
  - A patient is scheduled for an appointment tomorrow and the insurance company won't provide an authorization. What steps do you take?
  - A patient arrives complaining about their new glasses. What do you do?
  - Patient refuses OCT. Doctor requires it. How do you resolve the conflict?



# Screening Tools

- HR DIRECT
  - Paper versus Online
    - Paper version lets you evaluate speed
    - Rarely does everyone complete all 40 questions in the time allowed. That's OK.
    - 50% a minimum for consideration
  - <https://www.hrdirect.com/applicant-potential-test?srsId=AfmBOoqRDbcQYwX4QT95og-uL3yoXh1jqCig5UfygEdhEMy4VE7O621o>

## 2. Empower People

- Be open to different solutions and resolutions
- Affirm ideas
- Try every reasonable options
- Encourage change and new methods



Always Be  
Appreciative



Ask Them About  
Their Goals



Help Them Find  
Their Strengths

## 3. Encourage Active Listening

- Pay attention. Give the speaker your undivided attention and acknowledge the message
  - Repeat back
- Show that you are listening
  - Eye contact
  - Body Language
- Provide feedback
  - Positive – move forward
- Defer judgment
  - Don't negate
- Respond Appropriately
  - Give time and thought to information



## 4. Invest in Training and Education

- Attend State Association and Vision Expo

- Retreat

- Internal

- On-line

- Budget and Plan Ahead



## 5. Support Practice Knowledge

- What does the team know about you?
- What are the practice goals?
- Make it fun!
  - Contest
  - Scavenger hunt for clues
  - Demonstrate with field trips
    - Ted Lasso



## 6. Meet One-on-One

- Not a Performance Appraisal
  - Affirm – don't criticize
  - Ask them about themselves
    - What do patient's remember about you?
    - What are most proud of?
  - Share successes
    - Encourage them to brag
      - Which patient's are your favorite?
      - Why?



# 7. Have a Development Plan

- Performance Appraisal
  - Development Goals – 3 maximum
    - High – 70 %
    - Medium – 25%
    - Low – 5 %
  - Check in
  - Tied to raise

<p><b>Goals - 1 Month</b></p> <p>1.</p> <p>2.</p> <p>3.</p>	<p><b>Projects</b></p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>	<p><b>AM Routine</b></p> <ul style="list-style-type: none"> <li>• __ AM - Wake</li> <li>• __ AM</li> </ul>
<p><b>Goals - 6 Months</b></p> <p>1.</p> <p>2.</p> <p>3.</p>	<p><b>Skills Development</b></p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>	<p><b>PM Routine</b></p> <ul style="list-style-type: none"> <li>• __ PM</li> <li>• __ PM - Sleep</li> </ul>
<p><b>Goals - 3 Years</b></p> <p>1.</p> <p>2.</p> <p>3.</p>	<p><b>Books/Podcasts/Docos</b></p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	<p><b>Affirmations</b></p> <ul style="list-style-type: none"> <li>• 3 Things I am proud of:</li> <li>• .</li> <li>• 3 Things I love about myself:</li> <li>• .</li> <li>• 3 Things I am grateful for:</li> <li>• .</li> </ul>
<p><b>10 Year Goal</b></p> <p>1.</p>		

PERFORMANCE APPRAISAL

Staff Member \_\_\_\_\_

Date \_\_\_\_\_

ACHIEVEMENTS:

\_\_\_\_\_  
 \_\_\_\_\_ Completes daily duties, accurately and in a timely manner.  
 \_\_\_\_\_ Meet established goals.  
 \_\_\_\_\_ Supports co-workers by voluntarily assisting with work loads.

Comments:

INITIATIVE

\_\_\_\_\_  
 \_\_\_\_\_ Performs duties effectively with a minimum of supervision.  
 \_\_\_\_\_ Decisions made with practice goals and patient care as objective.  
 \_\_\_\_\_ Takes decisive action and follows through to completion.

Comments:

CONCEPTUAL ABILITY

\_\_\_\_\_  
 \_\_\_\_\_ Grasps new concepts quickly and applies them.  
 \_\_\_\_\_ Resourceful and innovative in problem solving.

Comments:

PLANNING

\_\_\_\_\_  
 \_\_\_\_\_ Plans to meet objectives.  
 \_\_\_\_\_ Schedules long range projects effectively.  
 \_\_\_\_\_ Budgets resources effectively (time, people, equipment, money).

Comments:

ORGANIZATION

\_\_\_\_\_  
 \_\_\_\_\_ Work progresses in an orderly and organized manner.  
 \_\_\_\_\_ Handles multiple tasks simultaneously.  
 \_\_\_\_\_ Function well in high stress environment.

Comments:

COMMUNICATION

\_\_\_\_\_  
 \_\_\_\_\_ Knowledge communicated to appropriate staff and supervisors.  
 \_\_\_\_\_ Information clearly and concisely reported.  
 \_\_\_\_\_ Reports well written and submitted in a timely manner.

Comments:

PROFESSIONAL SKILLS

\_\_\_\_\_  
 \_\_\_\_\_ Develops methods and skills for fulfilling duties and responsibilities.  
 \_\_\_\_\_ Able to prioritize with practice objectives and patients care in mind.

Comments:

LEADERSHIP SKILLS

\_\_\_\_\_  
 \_\_\_\_\_ Directs and coordinates projects.  
 \_\_\_\_\_ Encourages and stimulates practical and original ideas from others.  
 \_\_\_\_\_ Delegates authority and responsibility fairly and appropriately.

Comments:

PATIENT SATISFACTION

\_\_\_\_\_  
 \_\_\_\_\_ Quality – committed to patient care with excellence and complete satisfaction.  
 \_\_\_\_\_ Integrity – identifies and solves problems while meeting goals.  
 \_\_\_\_\_ Interface – easy to do business with – courteous, responsive, pleasant, professional.

Comments:

INTERPERSONAL SKILLS

\_\_\_\_\_  
 \_\_\_\_\_ Behaves in a thoughtful, intelligent manner while building relationships.  
 \_\_\_\_\_ Stimulates enthusiasm in the group.  
 \_\_\_\_\_ Motivates staff creates team environment and good morale.  
 \_\_\_\_\_ Recognizes and supports other staff members for their abilities.

Comments:

Ranking:

- 5 = Outstanding
- 4 = Above average
- 3 = Satisfactory
- 2 = Acceptable
- 1= Needs improvement

STRENGTHS:

IMPROVEMENTS:

RANKING: \_\_\_\_\_ / 145

GOALS:

● Completed by:

● Completed by:

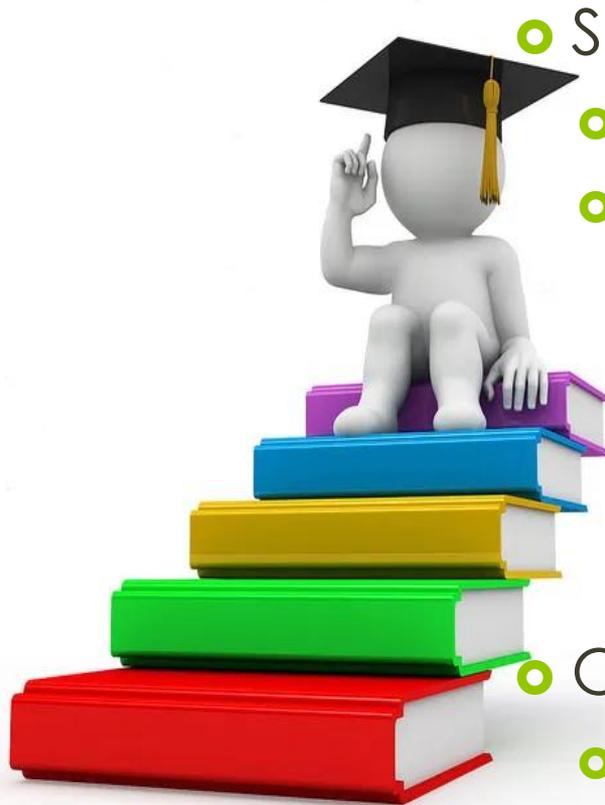
● Completed by:

Employee \_\_\_\_\_

Supervisor \_\_\_\_\_

Date \_\_\_\_\_

## 8. Require Annual Education



- Strategize and plan their program
- Pre and post program planning
- Professional or personal growth
  - Insurance billing changes
  - Optician
  - Leader
  - I Phone and Excel examples
- One new idea annually
  - Always looking for improvement

# Re-evaluate your team

- Where are they strong?
- What skills need developing?
- Who doesn't fit?
- How do you need to change/improve?

