

NEW TO THE PRACTICE?

Focus on These 5 Areas First

Angie Chatman

It's your first day as the new administrator at New Practice Eyecare, and you're looking forward to implementing the changes you discussed during the highly competitive interview process. You recognize the areas for improvement as well as the practice's strengths upon which you'd like to expand, and you can't wait to get started. In other words, you're ready to hit the ground running.

Before you take that first step, however, review this list of administrator-vetted strategies to strengthen your chances for success.

1. GET TO KNOW THE PRACTICE INSIDE AND OUT.

Hugh Glatts, Chief Executive Officer at Mittleman Eye in West Palm Beach, Florida, suggests patience.

"First, get to know the practice. Get to know the patients. You have the job, take your time before making any drastic changes." Talk to everyone: reception, billing, doctors, vendors, contractors, and cleaning staff.

Patricia M. Morris, MBA, COE, principal consultant for PMCOE/Excellence in Eye Care Leadership Support, would encourage any new employee, especially a new administrator, to first introduce themselves and ascertain how the practice operates. Morris, a former administrator with more than 30 years of ophthalmic operations experience, recommends using "Management by Walking Around" (MWA), a term coined by Thomas J. Peters, author of numerous business management books including

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- Get to know the practice inside and out.
 - Determine the training needs of the practice's employees.
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[This job] is a marathon, not a sprint. It takes time to identify and make changes in any organization. You can't do it all and you can't do it alone.

—Ashlie Barefoot Malone, MBA, JD, COE, Carolina Cataract and Laser Center

the popular *In Search of Excellence*, coauthored with Robert Waterman.

MWA means that you follow, both figuratively and literally, the journey of a patient from entry to exit. Were they greeted by the receptionist? How long did they have to wait? How quickly were they able to pay for their services and leave? Did they book their next appointment? Were they asked to?

MWA also means being curious as you observe. Ask everyone about their job and what they would do to help the practice succeed. The purpose of walking around is to look, listen, and learn. While you watch, “zoom out” to determine what the environment looks, smells, and sounds like from the patient’s point-of-view. It’s the small, sensory details that make a practice feel welcoming, safe, and inviting.

Hayley Boling, MBA, COE, and CEO at Boling Vision Center and INSIGHT Surgery Center in Elkhart, Indiana, received certification from the Ritz-Carlton Hospitality Training Center and encourages her colleagues to apply those same hospitality principles to eyecare. “Think of our patients as our guests,” she advises her team. “It’s everyone’s job to provide an amazing guest experience [for our patients].”

By using MWA, not only do you glean information; you also begin to acquire the trust of your team. According to a recent article in the *Harvard Business Review*¹, trust is essential to job satisfaction and good relationships among co-workers. It takes time to build a good relationship, but only one negative incident to destroy one. In general people are reluctant to change, but they will do so if they trust the leader.

Another advantage of MWA is that this routine leads to an understanding of the Center’s culture. “Culture is King,” says Boling. “In general, people in the medical sector are reluctant to change. However, it’s only with change that the practice can grow and evolve. The phrase ‘we’ve always done it that way’ is a death knell to any business.”

2. DETERMINE THE TRAINING NEEDS OF THE PRACTICE’S EMPLOYEES.

Staff and organizational culture are the first areas to which new administrators should direct their attention. In addition to being “out on the floor” daily, Morris encourages her clients to make reviewing job descriptions a priority. “In a busy practice documenting what people actually do, versus what they were hired to do, isn’t always at the top of the list. Being new is an

opportunity to garner more insight into the practice’s operations, as well as [to] discuss what people enjoy about their jobs and what kind of training is needed to help them grow.”

In 2021, according to the U.S. Bureau of Labor Statistics, more than four million Americans quit their jobs. The number of exits was 3.6% higher in the healthcare sector than the previous year. During this “Great Resignation,” mid-career personnel have been the largest sector of job changers. Professional development is a way to retain talented employees by providing a definitive career path with opportunities to grow and succeed, benefiting both the individual and the practice.

“As caregivers our business is about people,” Boling says. “As administrators, it’s important to live a day in the shoes of our staff. To encourage them. To compliment them. To have fun as much as possible, so that they can give our patients an amazing guest experience.”

Ashlie Barefoot Malone, MBA, JD, COE, vice-president of Carolina Cataract and Laser Center (Ladson, South Carolina), agrees. “Make sure to surround yourself with good people who are in the right jobs, who know and are well-trained for those jobs.”

3. EXAMINE THE PRACTICE’S STRATEGIC PLAN, MARKETING PLAN, AND BUDGET: UPDATE AND REVISE IF NECESSARY.

People resist change. An inclusive strategic planning process demonstrates that the organization is being intentional with choosing what to change and when. Creating a strategic plan can lead to consensus about identifying and implementing the organization’s priorities. “Change doesn’t happen overnight. There’s always something else that will need to be addressed,” Boling says. “We use our plan to determine our goals. At the end of the fiscal year, we determine whether we’ve reached those goals.”

Data collection and planning are the largest and most successful drivers of change, Morris points out. “The financial health of a practice is the most obvious problem indicator. What a new administrator needs to do is find those drivers of change before small issues manifest themselves in financial losses. The key is to include staff in the planning process.”

Including staff in the planning process shows that you understand that they are important to the organization and its mission. As Glatts points out, “People

want to be included. They want to be acknowledged for their expertise and their contributions. They want to be heard.”

When you listen to *and hear* your staff members’ ideas, they feel taken care of. “If you take care of your people,” Boling says, “your people will take care of your patients.” Should a patient have a horrible experience, they will share that with members of the community. Given that word of mouth and referrals remain the most trusted drivers of new business, benchmark them (along with other marketing tools such as advertising on traditional and social media platforms and maintaining an up-to-date website) against other local practices of the same size and scope. Include these marketing tools, too, as part of your overall strategic plan, to be updated and revised relative to your practice goals.

4. VERIFY YOUR REGULATORY COMPLIANCE DOCUMENTS ARE IN PLACE AND UP TO DATE.

Morris suggests that within your first 90 days as administrator, you review all the practice’s regulatory compliance documents such as those from OSHA and HIPAA. This can give you a baseline for any foundational changes that are necessary, as well as highlight issues on which you do not need to immediately expend resources of time or money.

As part of this review also make note of the 5Ws of information security. Where is the data stored—in the cloud or onsite? What information is backed up? Who controls that process? Who has access to the data? When and how often is the system backed up?

Ransomware is a relatively new concern for small business in the healthcare sector, but according to Mimecast², it should be taken more seriously. In 2021, for example, a national health system was shut down, leaving staff to work with paper records for days. After demanding \$20 million, the attackers allegedly released the decryption key for free, but still threatened to publish confidential information. Advanced cybercriminal activity is now ubiquitous in every aspect of life. Unfortunately, ways to protect the data stored by that technology has lagged, so unauthorized exploitation of systems and networks also plague every aspect of life.

Given the switch to electronic records, it is imperative for offices to have a robust cyber security system.³

5. BE PATIENT. CHANGE TAKES TIME.

It shouldn’t be a surprise that many of the recommendations cataloged here are domains of

the Certified Ophthalmic Executive (COE) Examination. ASOA members have access to related courses, training materials, and webinars, which offer information from operational structures to technology and procedures commonly found in an ophthalmic practice.

What isn’t on the exam, but is also critical to an administrator’s success, is patience. “[This job] is a marathon, not a sprint. It takes time to identify and make changes in any organization,” Malone says. “You can’t do it all and you can’t do it alone. Know your weaknesses and surround yourself with good people who will support you.”

Boling concurs: “No one expects you to be perfect in everything you do. Surround yourself with people who fill in your gaps. [People] who see your potential and fill your tank.”

And while it may not be clear on your first day, the most important aspect of being a new administrator is to take care of yourself. “There will always be something to do (at work),” Boling points out. Make sure you take that day off. Use your vacation time. Don’t ignore friendships and family. That way you’ll be ready to go on from Day 2 through Day 365, and beyond. **AE**

NOTES

¹ Yu, Alisa, Zlatev, J., Berg, J. (2021, June 18). What’s the Best Way to Build Trust at Work? *Harvard Business Review*. Retrieved from <https://hbr.org/2021/06/whats-the-best-way-to-build-trust-at-work>

² Cardona, M. (2021, December 10). The Biggest Ransomware Attacks of 2021. *Mimecast*. Retrieved from <https://www.mimecast.com/blog/the-biggest-ransomware-attacks-of-2021/>

³ ASOA members can get excellent information about how to mitigate cyber threats and enhance cyber security by consulting *AE*’s “InfoTech” column, available in PDF form on the ASOA website (searchable at <https://www.asoa.org/educational-resources/administrative-eyecare/ae-magazine>).



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