

The HR Optical Dilemma “Managing the Staff”

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The HR Optical Dilemma “Managing the Staff”

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Great Plains Eye Clinic Ltd.
Sioux Falls, SD

- No Financial Interest

OPTICAL IS TOTALLY DIFFERENT!

- The HR function is totally different
- Opticians interact differently
- Opticians are sales-oriented, working in a retail environment
- Optical demands different management skills and administrative skills

IT IS DIFFERENT FOR EVERYONE!

- Different situations
- Different opticals
- Different staff
- Different administrators

Treat Your Opticians as Volunteers

As One
Individual action, collective power
Mehrdad Baghai & James Quigley

Mehrdad Baghai & James Quigley

DEVELOPING THE PRACTICE CULTURE

- Vision/Mission Statement
- History and achievements
- Clinical focus
- Family emphasis
- Incorporate as part of team

DEVELOPING THE PRACTICE CULTURE

Conditions of Employment:
I may not divulge any information about patients/clients of Great Plains Eye Clinic or Sioux Optical to any outside parties. I must maintain confidentiality.

DEVELOPING THE PRACTICE CULTURE

Conditions of Employment:
I cannot accept or receive any kind of tip or incentive from any patients, clients or vendors of products to either Great Plains Eye Clinic or Sioux Optical.

DEVELOPING THE PRACTICE CULTURE

Conditions of Employment:
I may not engage in any kind of solicitation of or sales to any patients or clients of Great Plains Eye Clinic or Sioux Optical.

DEVELOPING THE PRACTICE CULTURE


Conditions of Employment:
Any violation of these proscriptions are grounds for immediate dismissal.

Staff Development

- Ensure you have the right people on board
- Translate your corporate goals & culture clearly
- Facilitate rule setting
- Promote a culture of transparency and appreciation


Clear Expectations

- Company Culture
- Benchmarking
- Sales goals
- Open communication
- Just the facts – no emotion
- Documentation without judgment



Employee Expectations


- Pre-application expectations disclosure
- Be very up front and clear about all employee expectations
- Eliminates bottom 20% of applicants and 80% of all future personnel problems



Be 'slow to hire,' ensuring new people have the right skills and team chemistry; but 'quick to fire,' if you've made a mistake and the new employee can't grasp the complexities of the job or work well with others.

Transparency must permeate the practice

- Employee Manual
- Department Policy/Procedure Manuals
- Evaluation Process: Practice & Staff
- Compensation Process



"Structure, is the undergirding platform that gives you enough stability to feel free taking risks. It gives you a sense of mastery over your process."
--The Accidental Creative

STAFF SELECTION

Hire the personality and train the technical skills.

STAFF SELECTION

easier acceptance of standards
no preconceived notions
no bad habits
no gaming with spiffs

STAFF SELECTION

Sources

- Technical schools
- Other opticals, dispensaries
- Retail
 - o fashion
 - o department stores
 - o convenience stores

STAFF SELECTION

Sources

- Beauticians
- Customer service
- Wait staff

Avoid preconceived notions!

STAFF EVALUATION

MBWA

Management by Walking Around
Random monitoring
Informal appraisal
Immediate feedback

Progressive Discipline

- Documented Feedback, positive or negative
- Counseling
- Write up
- Reprimand
- Probation, with or without 2% pay cut
- Suspension, with or without pay
- Termination

“If it is not in writing, it never happened”
---our labor lawyer

Understanding of Consequences

- Clear Policies and Procedures
- Training and testing for understanding
- No pets or privileged employees: everyone must be treated the same
- Develop a history of appropriate consequences, so everyone's expectations are aligned.

DATA MUST BE PRESENTED

- You can't sell a salesman
- Opticians must be shown the facts very clearly
- Goals must be defined and agreed upon

DATA MUST BE PRESENTED

- Progress must be monitored daily in retail
- Keep personalities out of it - “Just the Facts”

Benchmarking

- # of Refractions
- Capture Rate
- Ave Price per Job
- Collections
- Contact Lenses Sold
- Refunds
- Discounts
- Remakes
- Warrantees
- Second Pair Sales

Staff Development/ Training

- Consistent emphasis
- Set aside specific times
 - Pinto: 1 hour per 40 worked
- Develop timelines, deadlines
- Note progress
- Reward

The Solution: An Intensive Internal Training Program

"Collaboration enables people to compensate for each other's blind spots...Collaboration operates through a process in which the successful intellectual achievements of one person arouse the intellectual passions and enthusiasms of others."

---Vera John-Steiner
The Orange Revolution

The Goal: An All Licensed Optical Staff


Individual Employee's Training Plan

From Orientation Week through promotion to Management!

- BSM | Connector for Ophthalmology
- Transitions | OSSILOR
- KANTOLA PRODUCTIONS | COSIAL
- FRED PIVOR SEMINARS | CAREERTRACK
- TOASTMASTERS INTERNATIONAL | WORLD LEADERS FOR TRAINING
- National Seminars Training

The Training Curriculum

Employee Brag Books



"Great teams universally reject the long-held view of the individual genius or charismatic CEO changing an organization, and instead place their faith fully in themselves and their ability to achieve."
- The Orange Revolution




Optical Training




NEW DISPENSER QUICK START
CERTIFICATE OF COMPLETION

THIS AWARD IS TO CERTIFY THAT

HAS SUCCESSFULLY COMPLETED ALL REQUIRED COURSEWORK AND TRAINING FOR THE NEW DISPENSER QUICK START PROGRAM.







APOLLO FOR ADVANCED DISPENSING PROFESSIONALS
CERTIFICATE OF COMPLETION

THIS AWARD IS TO CERTIFY THAT

HAS SUCCESSFULLY COMPLETED ALL REQUIRED COURSEWORK AND TRAINING FOR APOLLO FOR ADVANCED DISPENSING PROFESSIONALS.



TRANSITIONS OPTICAL STAR PARTNER



MEMBER
OF THE TRANSITIONS
PRO FORUM FOR OPTICAL
INDUSTRY INFLUENCERS
AND OPINION LEADERS

Training Videos







Customer Service Training Sequence








Staff Recognition



"A soldier will fight long and hard for a bit of colored ribbon."
-Napoleon Bonaparte

TRAINING, CERTIFICATION

- What is required?
- What is expected?
- Who pays?
- Evaluation!

Surgery Center Assistant



ROUB

Daisy Ruiz, (center) started as a student intern in high school. Now a college nursing student, her 4 years experience in the practice is invaluable!

Awards Breakfast



Employees become more engaged as they believe their teams, leaders, and organizations set clear goals, communicate openly, build trust, hold them accountable, and recognize great work.
 -- The Orange Revolution

Staff Recognition



"Develop and implement a plan to recognize individuals and teams. Recognition and rewards bring teams closer together, and you'll spur greater achievements."



"Allow it, train it, find it, reward it, promote and profile it."



TYSON EYE

"The more power managers give to their employees, the more those employees esteem their leaders."
 ---The Orange Revolution

STAFF COMPENSATION

- Emphasis on environment
- professional
- clinical
- Lifestyle dispensing
- no personal incentives

STAFF COMPENSATION

Hourly wage only

Bonuses

Gift cards

Stress compensation package

COMPENSATION

- Salary
- Bonus
- Commission
- Spiffs
- New concept based on capture rate

COMPENSATION

- Incentives
- Overtime
- Gift Cards

SALES INCENTIVES

- Vendors
- Opticians

INVENTORY CONTROL

- Shrinkage
- Separate check-in, check-out
- Serial number/bar code
- Turns - 4-8 x per year

1.86% SALES LOST

\$1860 per \$100,000

- 43.9% employee theft
- 31.4% shoplifting
- 18.6% administrative error
- 6.1% vendor fraud

EDGING/FINISHING

- Equipment
- Breakage – 11% industry standard
- Skilled workers
- Liability

VENDORS

- Who deals with them?
- How many?
- Defining the relationship
- Controlling the relationship
- Maximizing the relationship

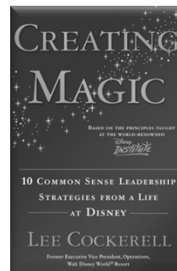
THE PATIENT APPEALS PROCESS

- 1) Frame Warranties
- 2) Lens Warranties
- 3) Lens Non-Adapt
- 4) Buyer's Remorse
- 5) Unreasonable Patients
- 6) Lab Errors
- 7) Measurement Errors
- 8) Rx Errors
- 9) Shipping Issues
- 10) Personality Conflicts

Listen
Document
Resolve
Evaluate
Prevent recurrence



Customer Service



- Disney Institute
 - Best Service in the World
 - Training
 - Leadership
 - Brand Loyalty
 - Inspiring Creativity
 - Quality Control
 - Tour of Disney Operations
 - www.disneyinstitute.com

Disney Customer Service Training



Orlando, Florida



MBA for Eye care Professionals September 2010



Live by Your Budget!

Category	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Income													
Expenses													
Savings													

Thank You

Good Luck