EVALUATING TEAM
PRODUCTIVITY & EFFICIENCY
ASOA 2014 K. Wankier

Financial Interest Disclosure
I have Financial Interest

Who am I?
■ 17 Years of business management / management & marketing consulting
  ■ 5 years as manager of multi-specialty practice
  ■ 4 years as manager of retail businesses
  ■ 6 years as founder and managing partner of management & marketing consulting firm
  ■ 3 years as managing partner of refractive surgery lead tracking sales and marketing software

First things First
■ Insist on clarity in communication, dedication to purpose, and commitment to the goal.
  ■ Metrics without a mission is mental merely wasted motion

Assume Excellence - Demand Performance
■ “The greatest leader is not necessarily the one who does the greatest things. He is the one that gets the people to do the greatest things.”
  — Ronald Reagan
3 Pillars of Productivity

- Roles & Responsibilities
- Metrics
- Accountability

Roles & Responsibilities

- Defines:
  - The nature of the task or initiative
  - The person accountable for task completion
  - The person responsible for task completion
  - The person or people responsible for supporting successful task completion

Establishing R&R

- Know your objective
- Set strong and achievable stretch goals
- Determine deadlines
- Match people to protocol and tasks
- Let’s construct R&R
  - R&R Worksheet demonstration

Metrics

- Track
  - Create a culture of achievement and results
- Monitor
  - Turn top performers into proactive reporters
  - Think Labrador retriever
- Measure
  - If you can’t measure it, know what success feels like
Refractive Performance Indices

- Software reports hyperlink

Why the Metrics Matter

- ROI Metrics
  - CPL
  - CPE (sx)

- Lead Metrics
  - 2011
  - 2012
  - 2013

- Revenue
  - 2011
  - 2012
  - 2013

- Spent
  - 2011
  - 2012
  - 2013

- Net Income Per Eye
  - 2011
  - 2012
  - 2013

- Cash on Cash Yield
  - 2011
  - 2012
  - 2013

- Long Term Gains from monitoring the metrics

The Power of Metrics

- Client A wait times spreadsheet
- Client B wait times spreadsheet
- Capture effectiveness report demonstration
- Conversion effectiveness report demonstration
- Financial Cost Per Lead report demonstration
- Financial performance report demonstration

Suggested Metrics

- Patient Perception
  - On hold
  - Reception readiness

- Key work product
  - Phone call/appointment quantity
  - Capture rate
  - Conversion rate
  - Work up quantity

- Operational Effectiveness
  - Clinic Productivity
    - Patient quantity (daily, weekly, monthly)
  - Technician Productivity
    - Per technician
    - By appointment type
  - Operational Efficiency
    - Daily patient quantity divided by total patient wait time
Accountability

Yard Stick or Club: You Decide

- Coach employees to see the vision of their responsibilities
- Give employee the responsibility of measurement
- Never miss their scheduled reporting
- Raise the standards and provide environment of opportunity

Make Employees Their Own Yard Stick

- Undercommunicate
- Create isolation through unclear expectations
- Express disappointment in their inability to read your mind
- Never express appreciation or positive feedback

Pillars of Efficiency

- "The quality of a person's life is in direct proportion to their commitment to excellence, regardless of their chosen field of endeavor."
  - Vince Lombardi

PDCA Cycle

- Plan
- Do
- Check
- Act
Plan – Do – Check – Act Cycle

Plan
- What is the ultimate objective?
- What is the desired outcome?
- What resources are needed?
- Who can meet the needs?
- When is the deadline?
- How will I measure progress?

Do
- Execute the Strategy
  - Principles of Execution
    - Clear, competent leadership
    - Framework for cultural change
    - Having the right team
      - Consult Collins, Maxwell, Bossidy
    - Tie together strategy with operations
    - Connect processes and people
    - Weld people to strategy

Check
- Monitor the metrics
  - Establish daily, weekly, monthly, and annual reporting protocols
  - Divide responsibility and accountability
  - Build ownership in results
  - Empower and enable people to make change
Act

- Work, work, work
- Transition thoughts, analysis, and plans into action
- Repeat the cycle

Wrap Up

- Have a strong, clear, overly communicated plan
- Match high quality people with high standards
- Measure outcomes and results against stated objectives
- Hold high achievers accountable
- Constantly PDCA
- Reward a job well done
- Always seek ways to help high achievers achieve more

Q&A

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