### Building a Successful OR Team

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### Financial Disclosure

Maureen Waddle is a Senior Consultant at BSM Consulting. Allergan, Inc. is a client of BSM Consulting.

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### Why worry about creating a “team”?

<table>
<thead>
<tr>
<th>Why</th>
<th>Benefit</th>
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<tr>
<td>Impeccable</td>
<td>Improve patient satisfaction.</td>
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<tr>
<td>Customer</td>
<td></td>
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<tr>
<td>Service</td>
<td></td>
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<tr>
<td>Whole is</td>
<td>Combining talents produces greater results.</td>
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<td>Greater than</td>
<td></td>
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<td>Sum of Parts</td>
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<td>Quality</td>
<td>Clear processes and understanding reduces errors.</td>
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<td>Patient</td>
<td></td>
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<td>Outcomes</td>
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<td>Maximizes</td>
<td>Happy, accountable teams are more productive.</td>
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<td>Output</td>
<td></td>
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<td>Quick</td>
<td>Teams know how to work together and effectively respond to any situation.</td>
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<tr>
<td>Response</td>
<td></td>
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</table>
**Objectives/Agenda**

- Create the right environment for efficiency.
- Provide training *in an enjoyable way!*
- Foster teamwork for continuous improvement.
- Return home with at least one “pearl”.

**Create the Right Environment**

- Hire the right people.
- Anticipate, plan, and develop processes.
- Train, train, train.
- Create opportunities for communication.

**What causes teams to break down?**

- Unclear expectations: Leadership issue
- Lack of training: Leadership issue
- Lack of effort: Employee issue
- Lack of accountability: Leadership issue
Staffing Components

Owners provide:
- Mission Statement: Gives a sense of purpose. Answers the question, "Why do we work?"
- Vision Statement: Provides scope of services and a sense of direction. Answers the question, "Who are we and what direction are we headed?"

Leaders Provide:
- Clear job descriptions
- Policies
- Performance reviews and ongoing coaching
- Communication opportunities

Setting Expectations

What is most important in creating a culture that encourages happiness and productivity?

Core Values
- Provide unity of thought to make better decisions.
- Answer the question, "What behaviors do we expect?"

Setting the Expectations

Training: Continuous Improvement

Vision/Plan
Assess/Measure
Assessment
Set Goals/Measures
Implement
Create Plan
EMPLOYEE TRAINING PLAN

Current Position: Scribe/Medical Assistant                New Position: Certified Ophthalmic Assistant (COA)

Required competencies for COA

- Demonstrated knowledge of ophthalmic assistant skills as outlined by JCAHPO  [N]
- Successfully complete the COA certification exam administered by JCAHPO  [N]
- Demonstrated eagerness and commitment to professional career (minimum 12 months experience as ophthalmic medical assistant or scribe)  [Y]
- Caring attitude and empathy towards patient needs  [Y]
- Excellent communication and interpersonal skills  [Y]
- Excellent organizational skills with attention to detail  [Y]

COMPETENCY GOAL #1: Knowledge of Ophthalmic Assistant Skills

- Complete independent study courses
  - JCAHPO Career Advancement Tool
  - AAO Study Guide
  - Preparing for the COA Exam (BSM Connection®)

- Study patient education materials and articles on various eye diseases
  - Cataract
  - Dry Eye
  - General Eye Care
  - Refractive Surgery
  - Pediatrics
  - Retina

- Gain knowledge of ocular medications and techniques for instilling eye drops

- Schedule monthly mentoring sessions with clinic supervisor to review COA tasks and testing skills

COMPETENCY GOAL #2: Complete COA Certification Exam

- Successfully complete COA certification exam administered by JCAHPO

Your Staff Members

Who are the experts?

Surgeons

Manufacturers

Consultants

Training: Rotate Responsibilities

A Guide to HIPAA and Patient Confidentiality

Click the appropriate dollar amount at right to proceed to that question.
Foster Teamwork

Team Building Exercise

Summary

Up front effort into building a team pays long-term dividends.
Clear expectations set the tone for success.
Train, communicate, train, communicate, train, etc.
Make it fun!

Any questions?
Thanks for attending!

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