Own Your Path: Professional and Personal Development Plans for Practice Administrators

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Andrew Maller, MBA, COE – BSM Consulting

ASCRS/ASOA – 2017

Financial Disclosure

Hayley has no financial interests or relationships to disclose.

Hayley is the Chief Executive Officer of Boling Vision Center.

Financial Disclosure

Andrew has the following financial interests or relationships to disclose:
BSM Consulting – C

BSM Consulting provides practice management solutions to specialty care providers.
Identify the importance of having a personal development plan

Develop a process for performing a personal SWOT Analysis

Determine how to incorporate your personal development plan with the goals of the practice

Learn how to overcome obstacles and barriers that prevent personal and professional growth

Objectives

The Situation

Tangible Skillset
Successful leaders also need to possess these intangible skills:

- Time Management & Prioritization
- Project Management
- Public Speaking
- Communication
- Meeting Facilitation
- Emotional Intelligence
- Conflict Resolution

Administrator Success

Tangible Skills

Intangible Skills

Hayley’s Story
Hayley G. Boling, MBA

Chief Executive Officer

Hayley is the Chief Executive Officer of Boling Vision Center & INSIGHT Surgery Center in Northern Indiana. Coming from a long line of ophthalmologists and entrepreneurs (3 generations), Hayley brings a unique perspective to ophthalmic leadership. She is passionate about developing and maintaining practice culture, maximizing efficiencies by modernizing practice processes and patient flow, and enhancing the guest experience by consistently exceeding expectations.

Hayley is an Advisory Board Member for BSM Consulting, a Board Member for the American Society of Ophthalmic Administrators (ASOA), the Task Force Chair for ASOA’s Administrator Beginners Circle (ABC), the Chairman of the Board for the Administrative Eyecare Magazine, a contributing author for several industry publications, an active committee member on ASCRS Government Relations and HIT Committees, a contributing author for innovative eyecare conferences and investigative ophthalmic journals, and a featured author in Ophthalmic Professional Magazine for developing a unique approach to customer service and exceptional guest experience.

Hayley was featured as an industry “Game Changer” by Administrative Eyecare Magazine in 2014 and then again in 2016. She was awarded “Citizen of the Year” from her local Lions Club in 2015 and was also featured on the cover of Ophthalmic Professional Magazine for her unique approach to customer service and exceptional guest experience.

Hayley can be reached at HBoling@BolingVisionCenter.com.

My Practice Summary

Northern Indiana (ND County)
1 Full Service Clinic Location
1 Ophthalmic Specific ASC

9 Total Providers
2 MDs, 1 DO, 6 ODs
75 FTEs
Medical | Routine
Cataract | Optical
Refractive | Cosmetic

My Intro to Ophthalmic Leadership

Sink or Swim?
I REFUSE to Sink … So Get to Work!

- Management Integration Program: 2-3 Month Rotation in EACH Position Within the Practice (12 Months)
- Learn Positions & People! Observe! (1 Month)
- SWOT, Personal Mission Statement, Vision & Values (First 30 days)
- Develop Strategic Plan (First 60 days)
- Join Ophthalmic Networking Group(s) (ongoing)
- Read, Read! READ! And Take Notes! (ongoing)
- Find External Resources to FILL IN MY GAPS! (ongoing)
- Seek Out Wise Counsel. Ask For Help/Guidance! (ongoing)
- Get Connected in the Industry! Volunteer! (ongoing)
- Never Ever Give Up or Get Discouraged! You’ve Got This! (ongoing)
Personal SWOT Analysis

SWOT Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats

Personal SWOT Goal

SWOT at the Practice Level

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location(s)</td>
<td>Aging Providers</td>
<td>Build Out Space</td>
<td>Local/National Economy</td>
</tr>
<tr>
<td>Reputation</td>
<td>Office Appearance</td>
<td></td>
<td>New Competitor</td>
</tr>
<tr>
<td>Staff Experience</td>
<td>High Data</td>
<td></td>
<td>Closing of Surgical Facility</td>
</tr>
<tr>
<td>Brand Position</td>
<td>OCS/LOW USE of Physical Space</td>
<td>Open Several Offices</td>
<td>Loss of Physicians</td>
</tr>
<tr>
<td>High Market Share</td>
<td>High Expenses</td>
<td></td>
<td>Loss of Referral Source</td>
</tr>
<tr>
<td>Referral Network</td>
<td>Poor Systems</td>
<td></td>
<td>Multi-Specialty Clinic</td>
</tr>
<tr>
<td>Exper. Management</td>
<td>Chaotic Processes</td>
<td>Add Products</td>
<td></td>
</tr>
</tbody>
</table>

4/18/2017
SWOT at Personal Level

Hayley’s 1st SWOT (2009)

Strengths
- Fresh Perspective/Asks Why?
- Educated/Smart/Customer Service Background
- Motivated/Determined/Refuses to Fail
- Mentally Tough/Confident/Difficult to Intimidate
- Energetic/Happy/Extrovert
- Competitive/Determined
- Communication Skills/Public Speaking
- Willing/Able to Apologize When Necessary

Weaknesses (Limitations)
- Age (early 20s when I took my position)
- Inexperienced/Green, Lacks Credibility
- Family Business/Relation to Founder
- Limited Financial Background

Opportunities
- Talented Doctors & Seasoned Staff
- Legacy Practice (50 Year History) with Loyal Patient Base
- Strong Community Presence/Outreach Initiatives
- Affiliations with other LEGACY Brands (Notre Dame, etc.)
- Known as THE doctor for LASIK
- Geographic Reach – Patients Come from ALL OVER
- Provider & Employer of Choice
- Excellent Reputation Across Region
SWOT at Personal Level

Hayley’s 1st SWOT (2009)

Threats
- No Official Mission Statement, Core Values, Vision, etc.
- Policies & Procedures Not On Paper
- Zero Succession/Disaster Plans in Place
- Poor Training Program (Sink or Swim) and No Formal Orientation/Onboarding Program
- Lacks Efficiency/Known For LONG Wait Times
- Lack of Service Line Awareness (Marketing Efforts Solely on LASIK)
- Under Qualified Management Team (Peter-Principled Individuals)
- No HR department. Potential Issues Below the Surface
  - Hiring For Warm Bodies, Not IDE
  - Staff Very Resistant to Change/Basic Individuals in Key Positions
  - Select Staff are “Untouchable”, Culture of Entitlement
  - No Pay/Wage Grid. No Structure For Raises/Bonuses
  - Doctors Not On Contracts (Handshake Agreements)

Swot Analysis
- Strengths - BUILD ON
- Weaknesses - RESOLVE
- Opportunities - SEIZE
- Threats - AVOID

Personal SWOT Goal

Reevaluate and Reprioritize

SWOTs are NOT a One & Done!
- Review Annually (Things change FAST!)
  - Have you built upon your strengths?
  - Have you resolved any of your weaknesses?
  - Have you seized any opportunities?
  - Were you able to avoid the threats?
- Reevaluate Personal & Practice Goals
- Reprioritize Action Items Accordingly
Developing Your Plan

Elements of Successful Development Plans

- Create goal areas
- Determine action items
- How does the goal help the practice?
- Create a timeline
- Identify people resources
- Identify other resources

Prioritizing Goal Areas

**Personal Level**
- What will have the greatest impact on my current performance?
- What will set me up for long-term success?

**Practice Level**
- Does it prevent me from performing my core job functions?
- How will completion of the goal enable practice success?
Time Management/Prioritizing

Covey’s Matrix

- Quadrant 1: Manage
  - Crisis, Pressing Issues, Deadline-Driven Tasks
  - Results: Stress, Burn-Out, Crisis-Management

- Quadrant 2: Focus
  - Principle-Centered, Planning, Opportunity Identification, Relationship-Building Tasks
  - Results: Vision, Perspective, Balance, Discipline, Control, Crisis-Prevention

- Quadrant 3: Avoid
  - Interruptions, Some Callers/Emails/Meetings, Popular Activities, Pressing Matters that should be delegated
  - Results: Short-Term Focus, Feels Out Of Control, Crisis-Management, Shallow Outcomes

- Quadrant 4: Limit
  - Trivial/Busy Work, Time Wasters, Entertainment
  - Results: Irresponsibility, Dependence on others for basics, Inability to Perform (when too much time spent)

Development Plan Template

<table>
<thead>
<tr>
<th>Goal #1</th>
<th>Goal #2</th>
<th>Goal #3</th>
<th>Goal #4</th>
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<tr>
<td>Action Item</td>
<td>Responsible Party(ies)</td>
<td>Timeline</td>
<td>Status</td>
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Good to Great!

Back to the Basics:
- Six Questions – 5W1H
- REMIX!
### Six Questions – 5W1H

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• Why won’t you quit until it’s completed?  

**START WITH WHO!**

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• How will I know what pace to keep?  
• How will I know when I’ve reached my goal?  

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**Fill In Your Gaps!**
Industry Resources

- Society & Academy Support (ASOA/AAOE)
- ASOAnalytics - Benchmarking
- BSM Consulting, BSM Connection
- Rose & Associates/Concoran Consulting
- Administrative Eyecare Magazine & Industry-Specific Publications
- Volunteer on Committees, Get Involved!
- Participate in Networking Groups (Administrator’s Beginners Circle, etc.)
- Focus on Education & Certifications (COE, etc.)

Training Courses and Programs

- Toastmasters
- Project Management Institute Certifications
- Certified Ophthalmic Executive (COE) Program
- Ritz Carlton Leadership Center
- Disney Institute
- Graduate Degrees and Executive Education Programs

Popular Development Books

<table>
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<tr>
<th>Book Title</th>
<th>Author</th>
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<tr>
<td>The 7 Habits of Highly Effective People</td>
<td>Covey, Stephen R.</td>
</tr>
<tr>
<td>The 7 Habits of Highly Effective People: Teaching Personal Accountability at Work and to the pinnacle of performance: Get the Results You Want, Own the Game</td>
<td>Miller, John D.</td>
</tr>
<tr>
<td>Year, Discover Your Strengths</td>
<td>Strosnider, Brian and Stosnider, Joe</td>
</tr>
<tr>
<td>Emotional Intelligence 2.0</td>
<td>Strosnider, Brian and Stosnider, Joe</td>
</tr>
<tr>
<td>Be Our Guest: Perfecting the Art of Customer Service</td>
<td>Eisen, Michael S.</td>
</tr>
<tr>
<td>Focus on What: How to Get the Work You Love and Live the Life of Your Life</td>
<td>Zmijewski, David</td>
</tr>
<tr>
<td>Mindfulness: The Five Essential Ingredients</td>
<td>Ploch, Tom and Parker, Ph.D. James</td>
</tr>
<tr>
<td>Leading at a Higher Level</td>
<td>Blanchard, Ken</td>
</tr>
<tr>
<td>Start and Keep</td>
<td>Harter, Tim</td>
</tr>
<tr>
<td>Thrive: Conversations</td>
<td>Patterson, Dan and Whitaker, Greg</td>
</tr>
<tr>
<td>Your Art of Friends and Influence</td>
<td>Carnegie, Dale</td>
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Summary

Change begins when we better attempt to understand ourselves.

Importance of integrating personal and practice plans together.

Importance of using external resources

Focus on continuous improvement. Be a life-long learner!

Thank you for attending!

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