


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

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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.



Objectives

- 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



The Situation

Tangible Skillset



- Human Resources
- Staff Morale
- Compliance
- Billing and Coding
- MACRA
- Financial Management









Brief Bio – Who am I?



Hayley G. Boling, MBA
Chief Executive Officer

"My goal is to take care of business while taking care of hearts!"



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 redefining 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 HT Committees, and a speaker/presenter/panelist at various eye care conferences and meetings across the country.

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 their unique approach to customer service and exceptional guest experience.

Hayley can be reached at HBoling@BolingVisionCenter.com.




My Practice Summary



Northern Indiana (ND Country)

4 Full-Service Clinic Locations

1 Ophthalmic-Specific ASC




*Integrity.
Compassion.
Excellence.*

9 Total Providers (2MDs, 1DO, 6 OOs)

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! (12 Months)
- SWOT, Personal Mission Statement, Vision & Values (First 30 Days)
- Develop Strategic Plan (First 90 Days)
- Join Ophthalmic Networking Groups (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




Personal SWOT Goal




SWOT Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats



SWOT at the Practice Level

Strengths	Weaknesses	Opportunities	Threats
Location(s)	Aging Providers	Build Out Space	Local/National Economy
Reputation	Office Appearance	Add Subspecialists	New Competitor
Staff Experience	High Debt	Expand Ancillary Services	Closing of Surgical Facility
Brand Position	Underutilization of Physical Space	Open Second Office	Loss of Physician
High Market Share	High Expenses	Acquire Retiring Physician's Clinic	Merger of Competitors
Referral Network	Poor Systems	Build Surgery Center	Loss of Referral Source
Experienced Management	Chaotic Processes	Add Products	Multi-Specialty Clinic Adding Aesthetic Medicine




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



BOLING
WALK ABOVE
DON'T STOMP DOWN

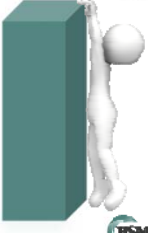
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SWOT at Personal Level

Hayley's 1st SWOT (2009)

Weaknesses (Limitations)

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



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WALK ABOVE
DON'T STOMP DOWN

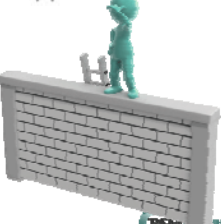
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SWOT at Personal Level

Hayley's 1st SWOT (2009)

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



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WALK ABOVE
DON'T STOMP DOWN


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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 ICE
 - Staff Very Resistant to Change/Toxic 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)



Personal SWOT Goal

SWOT Analysis

- Strengths - **BUILD ON**
- Weaknesses - **RESOLVE**
- Opportunities - **SEIZE**
- Threats - **AVOID**



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	Practice Level
<ul style="list-style-type: none">What will have the greatest impact on my current performance?What will set me up for long-term success?	<ul style="list-style-type: none">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**
 - Crises, 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: Inresponsibility, Dependence on others for basics, Inability to Perform (when too much time spent)

Covey's Time Management #1 Prioritization Matrix

Level of Importance (Y-axis) vs. Level of Urgency (X-axis)

Quadrant 1: Important & Urgent (1 - Manage)
 Quadrant 2: Important not Urgent (2 - Focus)
 Quadrant 3: Not Important & Urgent (3 - Avoid)
 Quadrant 4: Not Important not Urgent (4 - Limit)

Quadrant 1: Quantity - Increase
 Quadrant 2: Quality - Increase
 Quadrant 3: Quantity - Decrease
 Quadrant 4: Quality - Decrease

Quadrant 1: Description - Manage
 Quadrant 4: Result - Avoid

Development Plan Template

Goal #	Action Item	Responsible Party(ies)	Timeline	Status
Goal #1				
Goal #2				
Goal #3				
Goal #4				

Good to Great!



Good to Great!

Back to the Basics:

- Six Questions – 5W1H
- REMIX!

Six Questions – 5W1H

Who?

- Get the RIGHT people on the bus
- Get the WRONG people off the bus
- Get the RIGHT people in the RIGHT seats!

START WITH WHO!



Where?

- Where did we start as a practice?
- Where are we right now?
- Where do we want to end up?

Then, figure out where!

Why?

- Why do you ultimately want to make this change?
- Why hasn't it been done before?
- Why are YOU the right person for the job?
- Why won't you quit until it's completed?

Six Questions – 5W1H

What?



- What will the change do for the practice?
- What are the potential consequences (positive and negative)?
- What do you need to do to ensure success?

How?

- How should I begin?
- How can I garner support?
- How will I stay positive in the face of opposition?
- How will I know what pace to keep?
- How will I know when I've reached my goal?

When?


- When do you want to get there?
- When will you get started?
- When will you celebrate the wins?
- When will you evaluate & redirect?
- When will you ask for help?





Fill In Your Gaps!

Industry Resources

- Society & Academy Support (ASOA/AOE)
- ASOAnalytics - Benchmarking
- BSM Consulting, BSM Connection
- Rose & Associates/Corcoran 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


Book Title	Author
The 7 Habits of Highly Effective People	Covey, Stephen R.
QBQ! The Question Behind the Question: Practicing Personal Accountability at Work and in Life / Flipping the Switch: Unleash the Power of Personal Accountability Using the QBQ!	Miller, John G.
Good to Great	Collins, Jim
Now, Discover Your Strengths	Marcus Buckingham and Donald Clifton
Emotional Intelligence 2.0	Bradberry, Travis and Greaves, Jean
On Writing Well	Zinsser, William
Be Our Guest: Perfecting the Art of Customer Service	Eisner, Michael D.
Passion at Work: How to Find the Work You Love and Live the Time of Your Life	Kang, Lawler
Well Being: The Five Essential Elements	Rath, Tom and Hartner, Ph. D. James
Leading at a Higher Level	Blanchard, Ken
Start with Why	Sinek, Simon
Crucial Conversations	Patterson, Grenny; McMillan; Switzler
How to Win Friends and Influence People	Carnegie, Dale



Summary

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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