





# The Intentionality of Creating an AMAZING Practice Culture

*A Deep Dive Workshop for Practice Leaders & Their Teams*



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## #CULTUREGOALS



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**WELCOME & OPENING REMARKS** 



3

**MEET THE TEAM** 

**Program Chair:** Hayley Boling, MBA, COE

**Presenters & Panelists:**

- Heather Gerlach, BA, COE, CPPM, ABOC, COA, NCLEC, CPSS
- Brad Van Galen, MBA, COE, CPPM, CPOC, CPSS
- Beatrice Phillips, BS, CPSS
- Rhonda Kames, COA, CPSS, COPC
- Amanda Pairitz-Campo, MPS
- Ben Seals, MBA
- Bill Koch, COA, COE, CPC



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# FINANCIAL INTEREST DISCLOSURE




**Hayley Boling, MBA, COE Consultant:**  
I receive consulting income from a company that produces, markets, resells, or distributes ophthalmic products, devices, drugs, or services related to patient clinical care.  
I also provide practice management and culture consulting services to ophthalmic practices.

**Brad Van Galen, MBA, COE, CPPM, CPCO, CPSS**  
I have no relevant financial interests to disclose.

**Heather Gerlach, BA, COE, CPPM, ABOC, COA, NCLEC, CPSS**  
I have no relevant financial interests to disclose.

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# FINANCIAL INTEREST DISCLOSURE



**Ben Seals, MBA**  
I have no relevant financial interests to disclose.

**William T. Koch, COA, COE, CPC**  
I am a Contracted Consultant with BSM Consulting

**Rhonda Kames, COA, CPSS, COPC**  
I have no relevant financial interests to disclose.

**Amanda Pairitz-Campo, MPS**  
I have no relevant financial interests to disclose.

**Beatrice Phillips, BS, CPSS**  
I have no relevant financial interests to disclose.

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# Opening Exercise

## Instructions

1. Open Envelope.
2. Put Pieces in Order of Importance.
3. Look up at Screen When Finished.
4. Please Note ... This is an **INDIVIDUAL** Exercise.

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Place These Concepts in Order of Importance for Your Practice.

External Service Quality

Employee Productivity & Performance

Superior Customer Value

Customer Loyalty

Employee Satisfaction

Employee Retention

Shareholder Value

Revenue, Growth & Profitability


Internal Service Quality

Customer Satisfaction

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Place These Concepts in Order of Importance for Your Practice.



- Internal Service Quality
- Employee Satisfaction
- Employee Retention
- Employee Productivity & Performance

} **Team Focused**

- External Service Quality
- Customer Satisfaction
- Superior Customer Value


} **Patient/Service Focused**

- Customer Loyalty
- Revenue, Growth & Profitability
- Shareholder Value

} **Results Focused**

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## SERVICE PROFIT CHAIN MODEL




**To summarize ...**

- Internal Quality Drives Employee Satisfaction
- Employee Satisfaction Drives Loyalty
- Employee Loyalty Drives Productivity
- Employee Productivity Drives Value
- Value Drives Customer Satisfaction
- Customer Satisfaction Drives Customer Loyalty
- Customer Loyalty Drives Profitability & Growth

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CULTURE INSPIRATION 

**“Customers will never love a company until the employees love it first.”**

**- Simon Sinek**

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AGENDA 

- 1 Into to Culture
- 2 Practice Purpose
- 3 Cultivating Culture
- 4 Be the CHANGE
- 5 Culture in the Real World
- 6 Review & Prioritization

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CULTURE – WHAT IS IT? 

**Approximately 1/3 of employees are considering quitting their jobs ... 25% have resigned over the past 6 months.**

**-CNBC, Published 4-13-2022**

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CULTURE – WHAT IS IT? 

**The #1 reason for leaving ... 62% of respondents noted “toxic company culture”**

**-CNBC, Published 4-13-2022**

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CULTURE – WHAT IS IT? 

**“Of the top 7 factors ... 6 revolve around the employee experience. This speaks to how important it is to have a healthy company culture.”**

**-CNBC, Published 4-13-2022**

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CULTURE – WHAT IS IT? 

**94% of executives say that they know culture is important for business success, and it can help give them a competitive advantage, but they don't understand what culture really is.**

**-Deloitte**

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CULTURE – WHAT IS IT?



# Culture



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CULTURE DEFINED



- “The set of shared attitudes, values, goals, and practices that characterize an institution or organization.” *-Dictionary*
- “The combination of values, beliefs, and employee experiences which determine the 4 P’s – Purpose, Pride, Productivity & Profit – within an organization.” *-Betsy Allen-Manning*



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**CULTURE DEFINED**



- The glue that binds a group of individuals together internally.
- Permeates every single aspect of your practice.
- Is what makes your strategic goals & plans possible!
- Is a major predictor of your long-term success!
- Is EVERYTHING!



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**CULTURE INSPIRATION**



**“Culture isn’t just one aspect of the game ... IT IS THE GAME!”**

**- Lou Gerstner**


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**Business Case for  
Focusing On Your  
Practice Culture**

*Ben Seals, MBA*

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CULTURE INSPIRATION

**“Culture eats strategy for  
breakfast, operational  
excellence for lunch, and  
everything else for dinner.”**

**- Peter Drucker**

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## BUSINESS CASE FOR CULTURE



**"Culture** is what enables teams of people to defy the odds and achieve the remarkable."



-NFX Company Culture Scorecard and Playbook -

"Company culture is what employees live and breathe **every day** in the workplace."

- Mike Zani -

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## BUSINESS CASE FOR CULTURE




"The financial cost of having an **unhealthy organization** is undeniable: wasted resources and time, decreased productivity, increased employee turnover, and customer attrition."

- The Five Dysfunctions of a Team: A Leadership Fable, Patrick Lencioni -

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**ROI ON CULTURE**




CHALLENGE	COST PER EMPLOYEE	ADDITIONAL INFORMATION	YEARLY COST FOR 100 EMPLOYEES
Turnover	\$34,000 per employee	-	\$3.4 million
Disengagement	34% of an employee's annual salary	Average Salary: \$50,000	\$1.7 million
Productivity Challenges	\$5,000 per employee	-	\$500,000
Stress / Anxiety	\$1,685 per employee	-	\$168,000
Sick Days	\$3,900 per employee	-	\$390,000
Conflict	\$2,600 per employee	-	\$260,000

**TOTAL: \$6,400,000**


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**A CASE FOR CULTURE**



**What if...**

- Reduce turnover by 50%
- Increased project through-put by 100%
- Decrease team resistance to change
- Increase company growth by a factor of 3



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ROI ON CULTURE



**Companies with a strong culture see a 4 x increase in revenue.**  
- Forbes

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**Engaged Employees**




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**A GLANCE AT EMPLOYEE ENGAGEMENT IN THE U.S.** 

- **Engaged Employees Positively Affect The Following:**
  - ✓ Absenteeism & Staff Turnover
  - ✓ Patient Safety, Incidents & Clinical Quality
  - ✓ Patient Satisfaction
- **The High Performer:**
  - ✓ Works with a Positive Attitude
  - ✓ Shows Initiative
  - ✓ Communicates Effectively
  - ✓ Takes Ownership
  - ✓ Shows Enthusiasm
  - ✓ Acts Proactively
  - ✓ Shows Empathy
  - ✓ Shows Respect
  - ✓ Shows Honesty
  - ✓ Shows Integrity
  - ✓ Shows Accountability
  - ✓ Shows Responsibility
  - ✓ Shows Dependability
  - ✓ Shows Reliability
  - ✓ Shows Consistency
  - ✓ Shows Persistence
  - ✓ Shows Determination
  - ✓ Shows Commitment
  - ✓ Shows Dedication
  - ✓ Shows Loyalty
  - ✓ Shows Respect
  - ✓ Shows Honesty
  - ✓ Shows Integrity
  - ✓ Shows Accountability
  - ✓ Shows Responsibility
  - ✓ Shows Dependability
  - ✓ Shows Reliability
  - ✓ Shows Consistency
  - ✓ Shows Persistence
  - ✓ Shows Determination
  - ✓ Shows Commitment
  - ✓ Shows Dedication
  - ✓ Shows Loyalty
- **Disengaged Employees:**
  - ✓ Communicates Poorly
  - ✓ Shows Little Initiative
  - ✓ Shows Little Enthusiasm
  - ✓ Shows Little Proactivity
  - ✓ Shows Little Empathy
  - ✓ Shows Little Respect
  - ✓ Shows Little Honesty
  - ✓ Shows Little Integrity
  - ✓ Shows Little Accountability
  - ✓ Shows Little Responsibility
  - ✓ Shows Little Dependability
  - ✓ Shows Little Reliability
  - ✓ Shows Little Consistency
  - ✓ Shows Little Persistence
  - ✓ Shows Little Determination
  - ✓ Shows Little Commitment
  - ✓ Shows Little Dedication
  - ✓ Shows Little Loyalty

**The moral of the story ... make a point to focus on employee engagement by cultivating a strong practice culture!**

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**Part 1**

**Practice Purpose:  
The WHY Behind  
the WHAT**


.....

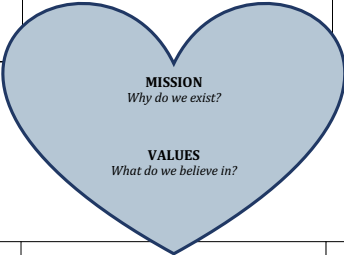
*Hayley Boling, MBA, COE*

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# CULTURE ASSESSMENT

## Culture Design Map - Current



<p><b>DECISION MAKING</b> <i>Who are the decision makers? What methods do we use to make decisions?</i></p>	<p><b>PRIORITIES</b> <i>What are the top 3 priorities that drive your practice culture? (i.e., The Golden Rule)</i></p>	<p><b>RITUALS</b> <i>How do we celebrate our people, culture, and work?</i></p>
<p><b>MEETINGS</b> <i>How do we convene and collaborate?</i></p>		<p><b>FEEDBACK</b> <i>How do we help each other learn and grow?</i></p>
<p><b>NORMS &amp; RULES</b> <i>What are the unspoken expectations for performance and behavior within your practice?</i></p>	<p><b>BEHAVIORS</b> <i>What behaviors do we correct? What behaviors do we celebrate?</i></p>	<p><b>PSYCHOLOGICAL SAFETY</b> <i>How do we encourage everyone to speak up? How do we promote participation and candor?</i></p>

*Where are we at TODAY?*

**Culture Questions:**

1. What does our Culture currently FEEL like?
2. What does our Culture currently LOOK like?
3. What does our Culture currently SOUND like?
4. What does our Culture currently SMELL/TASTE like?
5. How is our Culture currently being REMEMBERED?

\*Framework adapted by Fearless Culture

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# MAKE A COMMITMENT TO YOUR CULTURE



## Don't Allow the Tail to Wag the Dog



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OUR SECRET SAUCE ...




*Intentionality*  
**& FOCUS**



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BE INTENTIONAL. STAY FOCUSED.



**“If you aim at nothing ...  
You will hit it every time.”**  
- Zig Ziglar

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**in·ten·tion·al**  
[adj]  
performed with awareness;  
done deliberately,  
consciously,  
or on purpose

**Be Intentional In  
Everything We Do!**

- People
- Planning
- Performance
- Policies/Processes
- Pursuit of Goals

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**PRACTICE LEADERS - BE INTENTIONAL!**

**ASOA**  
YOUR PRACTICE. OUR PASSION.

sen|si

MENU

6:10 PM

72°

Humidity - 40%

Cool Mode Fan Auto

Set To 71

Set it High!

**BE A THERMOSTAT  
NOT A THERMOMETER**

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**PRACTICE LEADERS - BE INTENTIONAL!**



## **Be Intentional About Your Attitude**




**TAKE OFF THOSE GOTCHA' GOGGLES!**

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**PRACTICE LEADERS - BE INTENTIONAL!**



## **Be Intentional About Your Attitude**



**PUT ON THOSE GRATEFUL GLASSES!**

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**PRACTICE LEADERS - BE INTENTIONAL!**

**Be Intentional About ...**

- Defining Your Practice Purpose.
- Cultivating the Culture You Want!
- Vision Casting & Strategic Planning!
- Continuous Improvement, Growth & Development!
- Communicating & Embracing Feedback!
- Setting Goals & Celebrating Wins!
- Recognizing AMAZING When it Happens.
- Supporting, Encouraging & Empowering Others.

"Great results don't just happen. You have to be intentional."

-Michael Hyatt

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**PRACTICE LEADERS – BE INTENTIONAL**



*"An unintentional life accepts everything and does nothing. An intentional life embraces only the things that will add to the mission of significance."* – John C. Maxwell

**Recognizing Your AMAZING Team!**



**Celebrating Accomplishments**



**Having FUN With Your Team!!!**



**Engaging the Heart!**



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CULTURE INSPIRATION 

**“For individuals,  
character is destiny.  
For organizations,  
culture is destiny.”**  
- Tony Hsieh

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PRACTICE PURPOSE → YOUR COMPASS 



**Define Your “True North”**

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**YOUR PRACTICE BASICS - VISION**



**In a perfect world,  
what do we want our practice  
to be, look, & feel like in the  
FUTURE?**

*Boling Vision Center Example: "For ALL people to have meaningful access to eye care services that are rooted in Integrity, Compassion & Excellence, thus allowing the opportunity for ALL to SEE AMAZING in hopes of inspiring ALL to BE AMAZING!"*

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**YOUR PRACTICE BASICS - MISSION**





**What is our practice's  
reason for existence  
TODAY?**

*Boling Vision Center Example: "Compassionately serving the families of Michiana with a state-of-the-art, personalized eye care experience."*

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## YOUR PRACTICE BASICS – CORE VALUES





**What are our fundamental beliefs, priorities & driving forces as a practice that will help guide our behaviors, decisions & actions?**

*Boling Vision Center Example: "Integrity. Compassion. Excellence."*

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## YOUR PRACTICE BASICS - IMPACT





**IMPACT Statement**  
**What impact does my practice have on society that each team member ultimately contributes towards?**

*Boling Vision Center Example: "We protect, preserve & enhance the precious gift of sight."*

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**YOUR PRACTICE BASICS – “WHY”**





**"WHY"**  
What is the higher purpose of my practice that inspires/drives us to do all we do each day?

*Boling Vision Center Example: "To elevate vision beyond sight by helping people SEE the best in all of us."*

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**YOUR PRACTICE BASICS – FOCUS**



**Practice Focus**  
If you could break down your Strategic Plan into 3-4 areas of focus, what would they be?

*Boling Vision Center Example: E<sup>3</sup> Eye Care Focus: Efficiency, Effectiveness, Experience.*

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**YOUR PRACTICE BASICS - OTHER**




**What else keeps my practice focused on our target?**

**Motto:** "Serve ALL – Guests, BVC Family, Community & Self – with ICE: Integrity, Compassion & Excellence."  
**Tagline:** "Amazing Happens Here."  
*\* In addition, we have BVC Family & Guest Credos, "Boling Blue" Quality & Service Standards, Key Success Factors (Our Areas of Intentionality & Focus), Brand Standards, etc.*

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**PURPOSE-DRIVEN PLANNING**




**Vision** *What our Practice ultimately aspires to achieve.*

**Mission & Core Values** *What we do daily that will help us reach our Vision & what we stand for in the process.*

**Strategy → Strategic Priorities** *The intentional direction we will take to fulfill our Vision, Mission & Values.*


**Goals, Objectives & Key Results** *What we'll focus on in the near future & how we'll know when we've achieved it.*

**Initiatives, Projects, KPIs, Tasks & Tactics** *Our short-term "To-Do List" that drives progress.*

**Roadmap Foundation**

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CULTURE INSPIRATION



**“When your values are clear to you, making decisions becomes easier.”**

**- Roy Disney**

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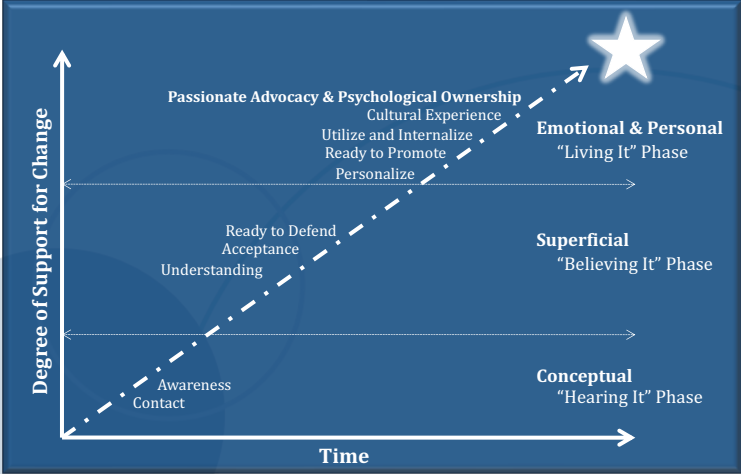
**Passionate Advocates**



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## HELP YOUR TEAM REACH PSYCHOLOGICAL OWNERSHIP/PASSIONATE ADVOCACY!





### What is Psychological Ownership (PO)?

PO is an authentic feeling of belonging and responsibility towards an organization.

The key elements of PO include:

- Pride
- Purpose
- Recognition
- Inclusiveness/Belonging
- Career Investment
- Authenticity

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## WHY IS PO IMPORTANT FOR YOUR PRACTICE CULTURE?



- **Psychological Ownership** is a characteristic of **Passionate Advocacy**.
- When you have Passionate Advocates as *employees*, they will create Passionate Advocates out of *guests* as a result.
- This is our goal, because it creates a culture where ...
  - ✓ Engaging guests and each other is every employee's mission
  - ✓ The support of company objectives is every employee's responsibility
  - ✓ Every employee feels empowered and valued
  - ✓ Every employee is an ambassador in and outside of the practice

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**CULTURE INSPIRATION**




**“If you do not develop your corporate culture ... it will develop itself. Corporate culture doesn’t happen by accident. And if it does ... you’re taking a risk.”**

**- Monique Winston**

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**CULTURE CASTING**



**Culture Design Map**

<p><b>DECISION MAKING</b> <i>Who are the decision makers? What methods do we use to make decisions?</i></p>	<p><b>PRIORITIES</b> <i>What are the top 3 priorities that drive your practice culture? (i.e., The Golden Rule)</i></p>	<p><b>RITUALS</b> <i>How do we celebrate our people, culture, and work?</i></p>
<p><b>MEETINGS</b> <i>How do we convene and collaborate?</i></p>	<p><b>MISSION</b> <i>Why do we exist?</i></p> <p><b>VALUES</b> <i>What do we believe in?</i></p>	<p><b>FEEDBACK</b> <i>How do we help each other learn and grow?</i></p>
<p><b>NORMS &amp; RULES</b> <i>What are the unspoken expectations for performance and behavior within your practice?</i></p>	<p><b>BEHAVIORS</b> <i>What behaviors do we correct? What behaviors do we celebrate?</i></p>	<p><b>PSYCHOLOGICAL SAFETY</b> <i>How do we encourage everyone to speak up? How do we promote participation and candor?</i></p>

*Where do we want to be in the future?*

**Culture Questions:**

1. What do you want your Culture to FEEL like?
2. What do you want your Culture to LOOK like?
3. What do you want your Culture to SOUND like?
4. What do you want your Culture to SMELL/TASTE like?
5. How do you want your Culture to be REMEMBERED?

\*Framework adapted by Fearless Culture

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HOW LONG TO SHIFT A CULTURE?




**It takes approximately  
12-18 months to see a  
significant culture shift.**

**- Culture IQ**

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A NEW DAY – IT’S TIME TO RISE!



**“I hope you realize that every  
day is a fresh start. That every  
sunrise is a new chapter  
waiting to be written.”**

**— Juansen Dizon**

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# A NEW DAY




- ✓ **Line in the Sand**
- ✓ **No Longer Tolerated**
  - Complaining
  - Entitlement Mentality
- ✓ **Expectations Were Clear**
  - Attitude of Gratitude
  - Work Ethic
  - Owning & Knowing Your Job
  - Accountability




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# A NEW DAY



**A New Day**

With all this being said, I would like to introduce you to A New Day at Boling Vision Center ... where hard work is rewarded, benefits are earned, improvements are celebrated and allegiance is expected. The days of unrealistic expectations are a thing of the past. We expect you to learn your job inside and out (i.e. Take notes at meetings, read, study, ask questions, etc). We expect you to follow the rules (i.e. Read the handbook, adhere to policies, etc.). We expect you to work hard with a positive attitude (I hope this one is self explanatory). We expect that you will not waste time (i.e. Don't go hang out or wait in line at the café while you're on the clock or when patients are waiting on you to serve them!). We expect that concerns will be addressed in an appropriate fashion (see above for more detail, if necessary). We expect that all people and initiatives will be respected (stop the gossip ... stop the complaining). After all, these expectations are no more than living by the mission statement and core values, don't you think?



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**MISSION & CORE VALUES**

ASOA

**MISSION POSSIBLE**

**ICE ICE BABY**  
BVC Style

**OUR BVC STORY**

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**WE GOT INTENTIONAL ABOUT OUR CULTURE**

ASOA

- The ICE Factor - Onboarding/Orientation by Department
- Bootcamp, Growth Plans & Career Pathing
- Established Quality Standards & Performance Expectations
- “Feedback is a Gift”
- Guest Experience (Customer Service) Training – “Guestology”
- Follow-Ups/Skill Checks/Action Plans/Performance Reviews

**OUR BVC STORY**

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## WE GOT INTENTIONAL ABOUT OUR COMMUNICATION



- Daily Intra-Company Communication
- Weekly E-Newsletter (Mission Possible Monday)
- Monthly All Staff Meetings w/ CEO
  - ✓ Celebrations – Birthdays, Anniversaries, Retirements, etc.
  - ✓ Regular Training & Development Opportunities
  - ✓ Updates & Announcements - Consistent & Accurate Delivery
  - ✓ Awards & Recognition – Certifications, Promotions, etc.
  - ✓ Shout Outs – Recognizing Others For Going Above & Beyond
  - ✓ Monthly Lumière Award Winner
    - Peer Nominated & Recognized by BVC Family
    - For Consistently Delivering an AMAZING Guest Experience
    - Entered into Annual Drawing for a Magical Disney Trip




# OUR BVC STORY

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## WE GOT INTENTIONAL ABOUT PLANNING, VISION CASTING, GOALS & CELEBRATING



- Annual BVC Family In-Service
- Theme – Selected by an All-Staff Vote
  - ✓ 2015 – Game Show Day
  - ✓ 2016 – Superhero Day
  - ✓ 2017 – Disney Day
  - ✓ 2018 – Decades Day
  - ✓ 2019 – Walk of Fame Day
  - ✓ 2020 – The Greatest Showman
  - ✓ 2021 – The REDO
- Review Mission, Vision, Purpose & Core Values
- BVC Family Gold Standards & Annual Initiatives
- Annual Must-Haves (HR, Compliance, Emergency Preparedness, etc.) - We Still Keep it Fun!
- Team Safety & Empowerment - Self Defense Course, etc.
- Team Bonding, Contests, Role Playing, Communication Exercises, Games & PRIZES!
- Annual Lumière Award Winner




# OUR BVC STORY

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# WE GOT INTENTIONAL ABOUT ENGAGING THE HEART



- ICE Committee
  - ✓ Community Outreach & BVC Awareness
  - ✓ Charitable Giving & Volunteer Initiatives
  - ✓ Theme Days, Party Planning, Staff Treats, etc.
- Compassion Bonus
- Boling Bucks
- K2PB



# OUR BVC STORY

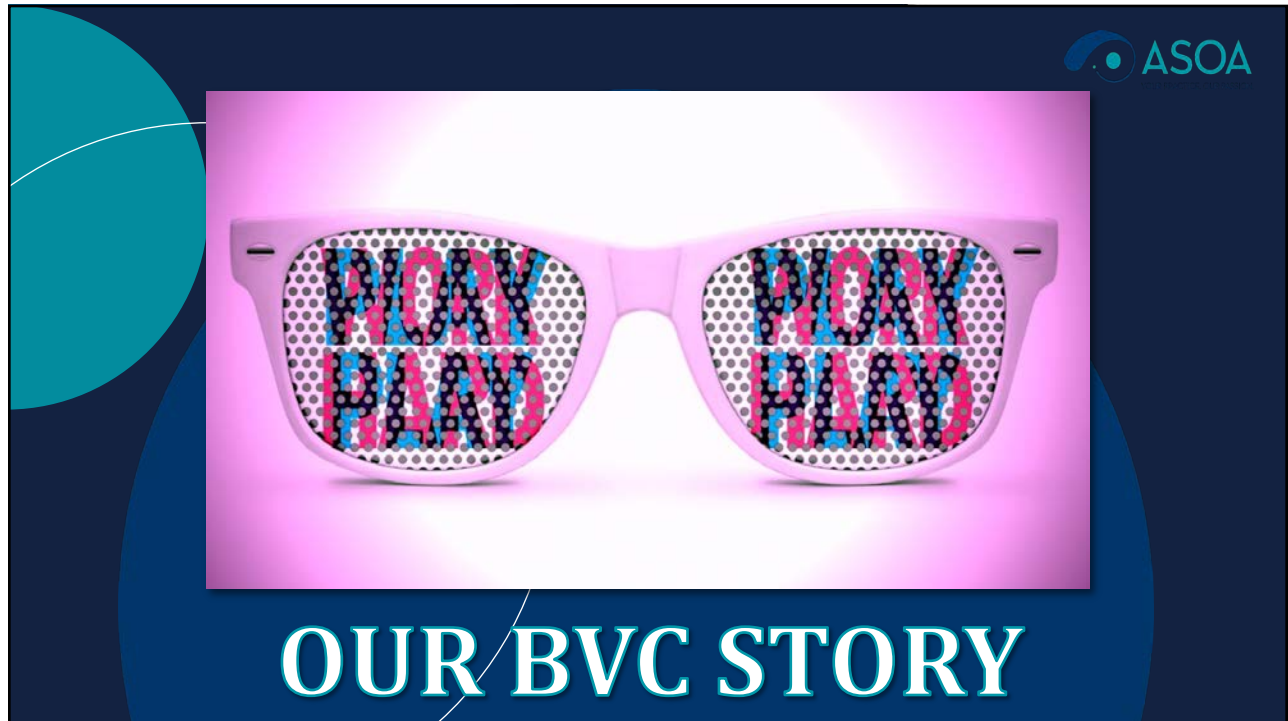
69

# These INTENTIONAL EFFORTS Resulted in

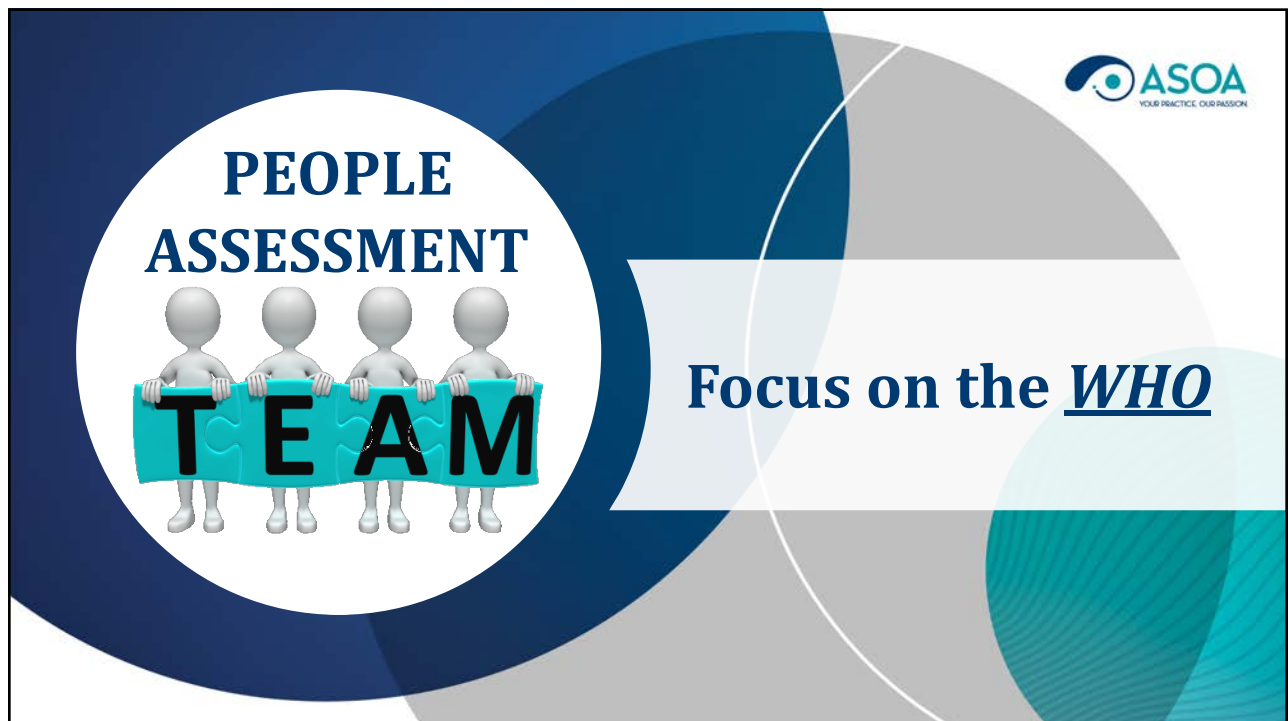


# A "Work Hard Play Hard" Culture

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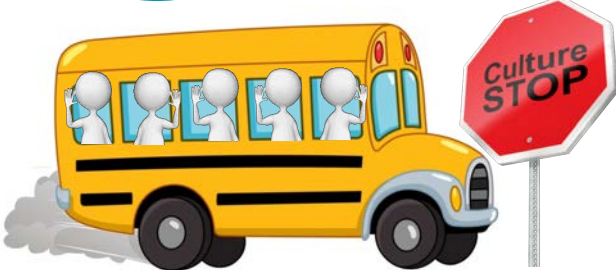
# FOCUS ON THE WHO



Get the **RIGHT** people **ON** the bus ...

the **WRONG** people **OFF** the bus ...

And the **RIGHT** people in the **RIGHT SEATS** on the bus!



The diagram consists of three circles connected by arrows. The first circle is teal and contains the text 'Get the RIGHT people ON the bus ...'. An arrow points to the second circle, which is dark blue and contains 'the WRONG people OFF the bus ...'. A second arrow points to the third circle, which is dark blue and contains 'And the RIGHT people in the RIGHT SEATS on the bus!'. Below the circles is an illustration of a yellow school bus with four white figures inside. To the right of the bus is a red octagonal sign on a post that says 'Culture STOP'.

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## Personality Types



# Know Your Team

The slide features a large white circle on the left containing the text 'Personality Types' in a blue, curved font. Inside this circle is an illustration of two white 3D figures holding a colorful pie chart with five segments (red, blue, green, yellow, red). To the right of this circle is a large, light blue arrow pointing towards the text 'Know Your Team' in a bold, dark blue font. The background is a dark blue gradient with abstract white and light blue shapes.

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## PERSONALITY TYPES


**Personality assessments can play a helpful, objective role in the hiring process, provided that:**

- 1) the proper assessment is used,
- 2) insights are applied correctly, and
- 3) it doesn't determine who to hire (just where they sit on the bus).

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## PERSONALITY ASSESSMENT



- Find The Right Tool For YOU
- Assess YOURSELF & Your Team
- Share Your Assessments
- Be Honest & Accepting To FEEDBACK About Your Personality
- Understand & Adjust

**Personality Assessment Example:**

Yellow: **67**

Red: **54**


Green: **44**

Blue: **25**




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# PERSONALITY TYPES




*We've found that certain personalities thrive in certain departments. Of course, this isn't a hard and fast rule, as it greatly depends on the makeup of the team and the individual.*

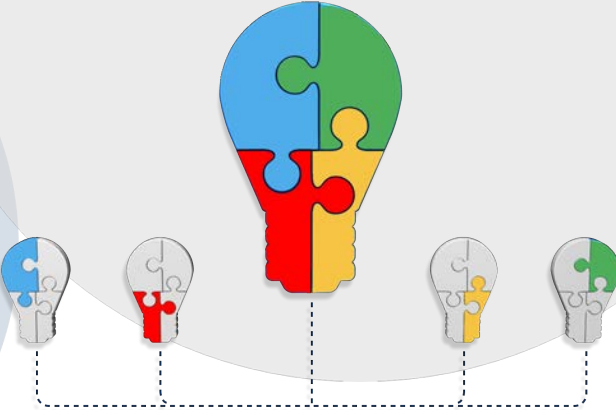
 <p><b>RED-LION: TECHNICIANS &amp; SURGEONS</b></p>	 <p><b>BLUE-BEAVER: BILLING &amp; COMPLIANCE</b></p>	 <p><b>YELLOW-OTTER: MARKETING &amp; OPTICAL</b></p>	 <p><b>GREEN-RETRIEVER: FRONT OFFICE &amp; GUEST COUNSELORS</b></p>
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# PERSONALITY TYPES



Although most have a dominate personality type that **shines** through, it's important to remember we are ALL a blend of all of these "types", all of these colors.



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## PERSONALITY TYPES



### WHY Color Balance on a Team is Important:

Everyone  
Learns From  
One Another

Leads to  
Team  
Improvement

Stretches  
Everyone to  
Grow


Encourages  
Creativity &  
Imagination

Authentically  
Creates  
Engagement  
& Buy-In




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## PEOPLE ASSESSMENT



**“Leaders of companies that go from good to great start not with ‘where’ but with ‘who.’ They start by getting the right people on the bus, the wrong people off the bus, and the right people in the right seats. And they stick with that discipline—first the people, then the direction—no matter how dire the circumstances.”**

- Jim Collins



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BREAKOUT SESSION – WHAT COLOR ARE YOU?



**BREAKOUT SESSION**



**15:00**



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**Hire to Your Culture**

**Recruiting, Interviewing, Onboarding & Orientation**


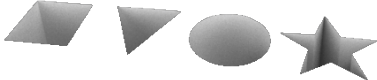
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# HIRE TO YOUR CULTURE




### Annual Turnover Costs Calculation

Average Salary of Separated Employees	×	Turnover Costs % (30%-100% of average salary)	×	Number of Separated Employees	=	Annual Practice Turnover Cost
\$35,000 Average Salary	×	50% Estimated Turnover Costs	×	10 Separated Employees	=	\$175,000 Annual Turnover Cost

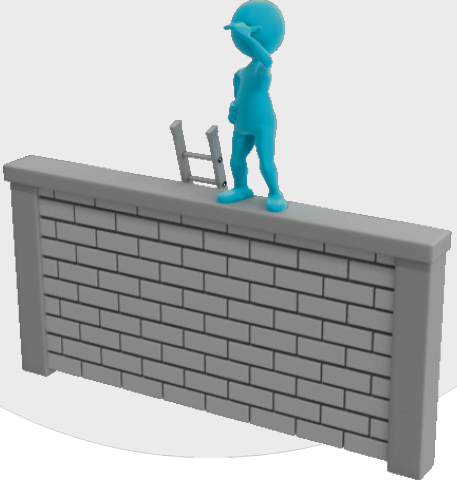




83

# RECRUITING



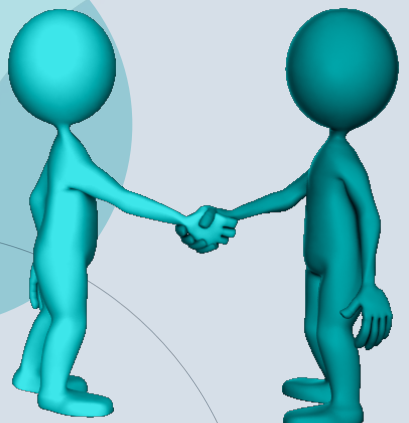
- No Warm Bodies
- Hire for Attitude & Train for Skill
- Outside the Medical Industry
- Allow People to WOW You ... Then Pounce!
- Your Greatest Referral Source: Your Team






84

# INTERVIEWING

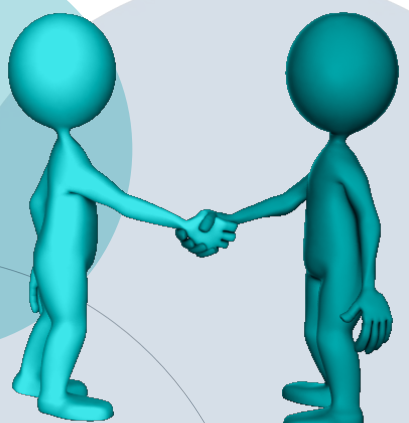





- Simple, Streamlined & Consistent
- Communicate Often
- 1<sup>st</sup> Round Screening – Watch out for **RED FLAGS**
  - Nothing to improve
  - Not interested in learning
  - Already asking for schedule accommodations
  - Pessimistic
  - Track record of issues with previous co-workers / managers at multiple different jobs

85

# INTERVIEWING





- 2<sup>nd</sup> Round – Focus on Fit
  - Core Values & Situational Questions - “Tell me about a time when ...”
  - Right Personality for the Role
- Shadow Position
  - Follow up with the team members they interacted with

86

# ONBOARDING BENEFITS



54% Greater New Hire Productivity

Full Proficiency 34% Faster

77% of New Hires That Hit First Milestone had Formal Onboarding

Manager Satisfaction Increases by 20%

87

# ONBOARDING



**Psychological Ownership**  
First opportunity to create an authentic feeling of belonging and responsibility toward company

**Introduction to Culture**  
What is important to your practice?

**Mission, Vision & Core Values**  
Help them understand that what they do is important, serves a higher purpose, and is bigger than themselves

**Set Expectations Early**  
More than just a job description.

**Create Buy-In**  
Drink the kool-aid! Why is your practice amazing?!



88




## SAMPLE SCHEDULE



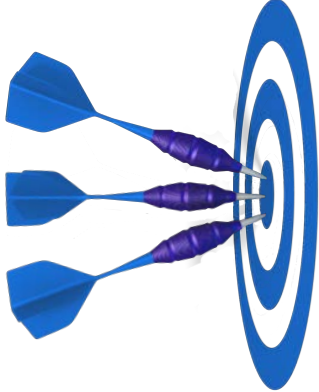
Prior to Day 1	Day 1	Day 2	Day 3
<ul style="list-style-type: none"> <li>➤ Welcome to the Team!                             <ul style="list-style-type: none"> <li>▪ Welcome Letter</li> <li>▪ Small Gift Bag</li> <li>▪ Swag</li> <li>▪ Intro to Department / Supervisor</li> </ul> </li> <li>➤ Communicate w/ Current Team                             <ul style="list-style-type: none"> <li>▪ Picture</li> <li>▪ Fun Facts</li> <li>▪ Department</li> <li>▪ Start Date</li> </ul> </li> <li>➤ Paperwork</li> </ul>	<ul style="list-style-type: none"> <li>➤ Basics                             <ul style="list-style-type: none"> <li>▪ Office Tour / Introductions</li> <li>▪ Door Codes / Clocking In</li> <li>▪ Intro to Docs</li> </ul> </li> <li>➤ <b>Lunch with Leadership</b></li> <li>➤ Culture                             <ul style="list-style-type: none"> <li>▪ Showcase Why Your Practice is Amazing</li> <li>▪ Mission Statement</li> <li>▪ Core Values</li> <li>▪ History of Practice</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>➤ Compliance                             <ul style="list-style-type: none"> <li>▪ OSHA</li> <li>▪ HIPAA</li> <li>▪ Sexual Harassment</li> <li>▪ Etc.</li> </ul> </li> <li>➤ Basics                             <ul style="list-style-type: none"> <li>▪ EMR Intro</li> <li>▪ Specialty Software Intro</li> <li>▪ Passwords</li> </ul> </li> <li>➤ Role Play                             <ul style="list-style-type: none"> <li>▪ Engaging with Guests</li> <li>▪ Difficult Encounters</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>➤ Observation Shadowing                             <ul style="list-style-type: none"> <li>▪ All Departments Including Surgery</li> </ul> </li> <li>➤ Mentor                             <ul style="list-style-type: none"> <li>▪ Intro</li> <li>▪ Background &amp; Career</li> <li>▪ Go-To!</li> </ul> </li> <li>➤ Debrief                             <ul style="list-style-type: none"> <li>▪ What was most exciting?</li> <li>▪ What confused you?</li> <li>▪ What do you want to learn more about?</li> </ul> </li> <li>➤ Review Practice Goals</li> <li>➤ Review Practice Strengths</li> </ul>


89

## SETTING THE STANDARD... *E<sup>3</sup>* EYECARE



- 1 **Efficiency** ➤ The ability to achieve an end goal with little to no waste, effort, or energy.
- 2 **Effectiveness** ➤ The degree to which something is successful.
- 3 **Experience** ➤ The process of using your senses in order to view and observe an event.





90

# BACK TO INTENTIONALITY



**Prepare**

**Be Intentional & Set Expectations**

**Meet Early ... Meet Often**



91

# FEEDBACK TRULY IS A GIFT



**It's All Around You ... Look For It**

**Give It and Listen to It**

**Continuous Improvement**



92

## PEOPLE RESPECT WHAT YOU INSPECT

Know Your Goals

➔

Measure It

➔

Show It

Name	Total Exams	Points	Points/Hr Worked
Angela Krueger	50	173	8.9
Pam Aleman	44	153	8.1
Danielle Saff	29	90	4.9
Madison Gray	28	99	3
Desirae Ross	25	59	3.2
Lynley Goodrich	19	68	4.2

**Annual Report 2022**

Points per Job

Second Pair Percentage

Frame Selections

Lens Material

Lens Type

AR | Polarization | Transitions

93

## CONTINUOUS IMPROVEMENT: CAREER PATHING, LEARNING, & GROWTH

Lessonly  
by SEISMIC

94

### CONTINUOUS IMPROVEMENT: CAREER PATHING, LEARNING, & GROWTH



*Onboarding*



*Training*



*Growth & Development*

95

### CONTINUOUS IMPROVEMENT: CAREER PATHING, LEARNING, & GROWTH



96



97



98





.....

# Working Lunch Culture Design Map - Let's Dig Deeper!


.....

*Team Boling*

**30:00**



99



.....

# Part 3 Be The Change

.....

*Team Boling*

100

BE THE CHANGE – LEADERSHIP STYLES 

# How often are leaders using the RIGHT leadership style when leading their people?



101

BE THE CHANGE – LEADERSHIP STYLES 



# 50% of the time!!!

-Ken Blanchard Companies

102

BE THE CHANGE – LEADERSHIP STYLES 

**56% of those who quit, or are planning to quit, note “poor management”**

**-CNBC, 4-13-2022**



103

BE THE CHANGE – LEADERSHIP STYLES 

**Sooooooooo ... what is the BEST Leadership Style???**



104

BE THE CHANGE – LEADERSHIP STYLES



# It Depends!

## Leadership is *(or should be)* Situational!

105

BE THE CHANGE – INTRO TO SITUATIONAL LEADERSHIP



# In Short ... Situational Leadership Is Based On The Relationship Between Leaders & Followers.

106

BE THE CHANGE – LEADERSHIP STYLES




**54% of leaders use only ONE leadership style, regardless of the situation.**

**-Ken Blanchard Companies**



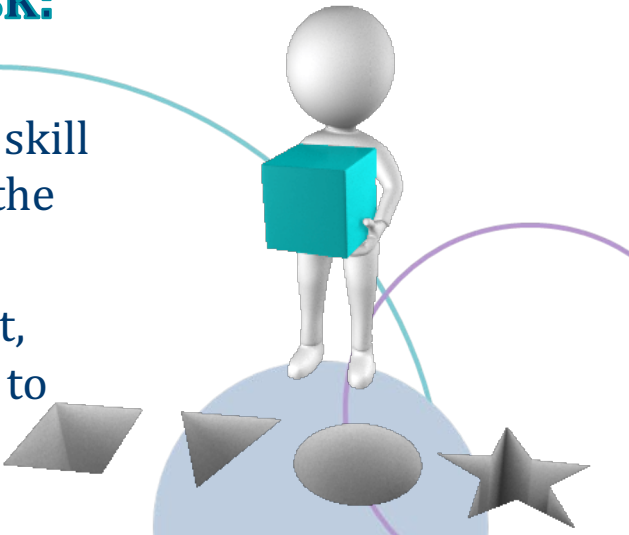
107

BE THE CHANGE – INTRO TO SITUATIONAL LEADERSHIP



**Situational Leaders ask:**


- How much task-specific knowledge, experience or skill does this person bring to the table?
- Is this individual confident, committed and motivated to perform this task?



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**BE THE CHANGE – INTRO TO SITUATIONAL LEADERSHIP**



**Based on those answers ...**

The Situational Leader identifies the Development Level of the individual, based on competence & commitment.

**Development Levels:**

- **Enthusiastic Beginner (D4)**
- **Disillusioned Learner (D3)**
- **Capable, but Cautious, Contributor (D2)**
- **Self-Reliant Achiever (D1)**

**LEADERSHIP STYLES**

**Follower's competence & commitment**

109

**BE THE CHANGE – INTRO TO SITUATIONAL LEADERSHIP**



**The Development Level ...**

determines the Leadership Style, driven by the need for supportive vs directive behavior, necessary for success.

**Leadership Styles:**

- **Delegating (S4)**
- **Supporting (S3)**
- **Coaching (S2)**
- **Directing (S1)**

**LEADERSHIP STYLES**

**Follower's competence & commitment**

110

BE THE CHANGE – INTRO TO SITUATIONAL LEADERSHIP 


**The Situational Leader ...**  
 applies the leadership style to fit the needs of the individual they are leading for that particular task.

**Situational Leadership:**

- **Enthusiastic Beginner (D4) → Directing (S1)**
- **Disillusioned Learner (D3) → Coaching (S2)**
- **Capable but Cautious, Contributor (D2) → Supporting (S3)**
- **Self-Reliant Achiever (D1) → Delegating (S4)**



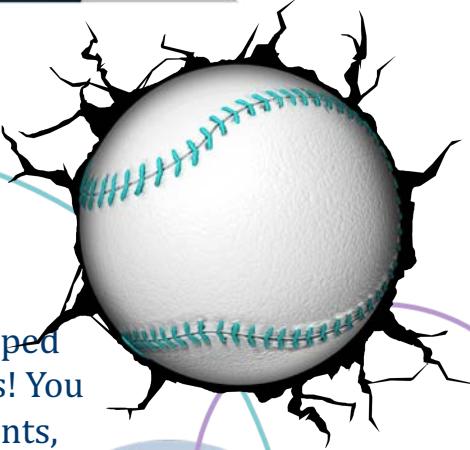
111

BE THE CHANGE – INTRO TO SITUATIONAL LEADERSHIP 


**An Example ...**  
 Think back to your childhood when you were learning something new ...

**Situational Leadership:**

- **Enthusiastic Beginner – you’re SUPER Pumped about joining little league with your friends! You order ALL THE STUFF (bat, glove, socks, pants, hat, batting glove, helmet ... EVERYTHING). Yay!**
- **You need the “Directing” Style – Hands-On Learning & Support.**



112


BE THE CHANGE – INTRO TO SITUATIONAL LEADERSHIP 

## A Real-World Example ...


Think back to your childhood when you were learning something new ...

### Situational Leadership:

- Disillusioned Learner – Your 1<sup>st</sup> public STRIKE OUT ... Humiliation ... Bruised Ego ... Why did I sign up for this??? Am I capable? Will I get better?
- You need the “Coaching” Style from your support system/coach – Skill Development & Feedback



113

BE THE CHANGE – INTRO TO SITUATIONAL LEADERSHIP 

## A Real-World Example ...

Think back to your childhood when you were learning something new ...


### Situational Leadership:

- Capable, but Cautious, Contributor – You’ve Practiced ... You’ve gone to the batting cages ... You’ve listened to your coach ... you’re up to bat and the flutters in your belly creep in! Base Hit!
- You need the “Supporting” Style – Assess & Encourage.



114

**BE THE CHANGE – INTRO TO SITUATIONAL LEADERSHIP**




## A Real-World Example ...

Think back to your childhood when you were learning something new ...

### Situational Leadership:

- Self-Reliant Achiever – You’ve listened ... you’ve applied the knowledge from your coach ... you’ve studied your film & made tweaks to your swing ... you’re batting CLEAN UP!!! HOME RUN!!!
- You need the “Delegating” Style – You’ll thrive with autonomy & appreciation. Go YOU!



115

**BE THE CHANGE – TO LEARN MORE ...**



AN SLII® EBOOK  
ARE YOU A DIRECTIVE OR A SUPPORTIVE LEADER?




**Check Out This Ebook To Assess Your Skills!**

**Want to Dig Deeper?  
Here's a Great Book!**



NEW YORK TIMES BESTSELLING AUTHOR  
OVER 22 MILLION BOOKS SOLD

**KEN BLANCHARD**  
and the Founding Associates and Consulting Partners of  
THE KEN BLANCHARD COMPANIES®

**LEADING  
AT A  
HIGHER  
LEVEL**


BLANCHARD ON LEADERSHIP AND CREATING  
HIGH PERFORMING ORGANIZATIONS

THIRD EDITION

116



CULTURE INSPIRATION



**“Leaders don’t motivate anyone.  
They create cultures that unleash human potential!”**

**– Tom Atchinson, PhD**

117



**Emotional Intelligence & Leading with Empathy**

118



# EMOTIONAL INTELLIGENCE (EI OR EQ)

The ability to understand, use, and manage your own emotions in *positive ways* to relieve stress, communicate effectively, empathize with others, overcome challenges and defuse conflict.

119

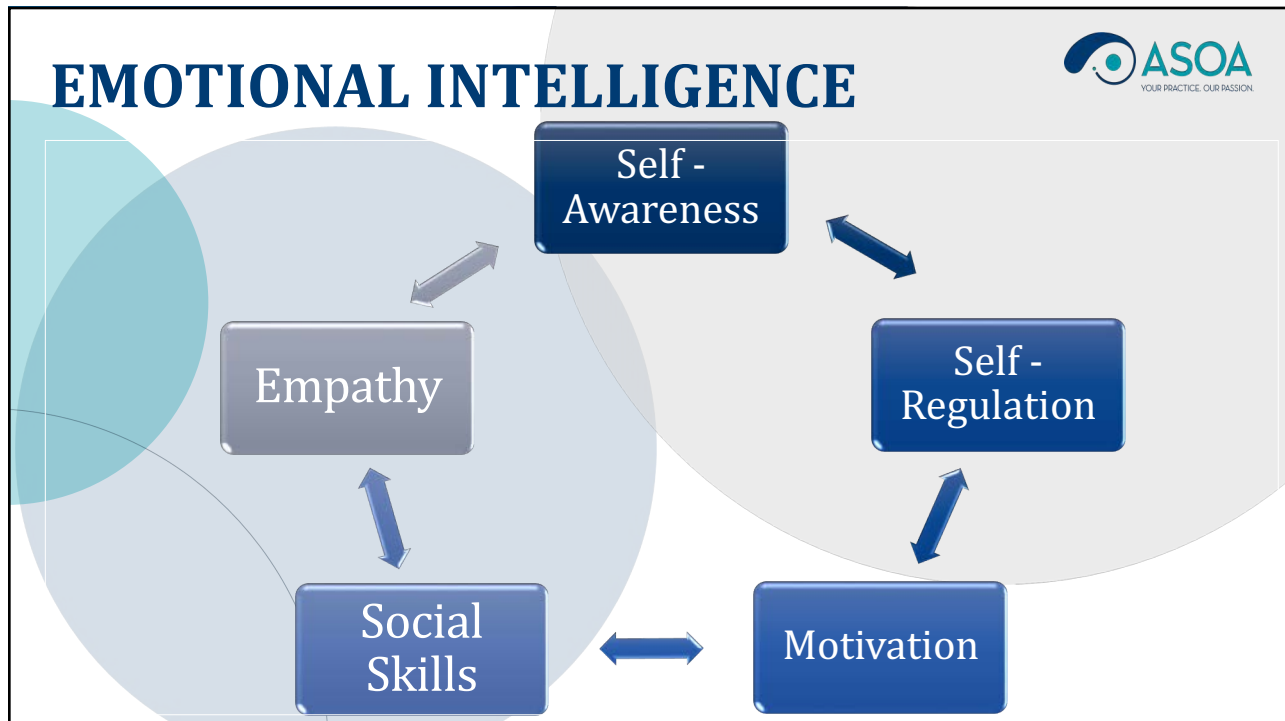
# WHY DOES THIS MATTER?

- Retain Top Talent
- Emotions are Contagious
- Perception is Reality
- Create Buy-In & Foster Trust Within the Team



 IN CONJUNCTION WITH BSM Consulting®

120




121

<b>Components of Emotional Intelligence</b>	
<b>Component</b>	<b>Definition</b>
<b>Self-Awareness</b>	The ability to identify your emotions and emotional triggers.
<b>Self-Regulation</b>	The ability to control and adjust your emotions to create a more positive effect.
<b>Motivation</b>	The process that initiates, guides, and maintains goal-oriented behaviors. It is what causes you to act.
<b>Social Skills</b>	The tools that enable you to interact competently and appropriately in a given social context.
<b>Empathy</b>	The ability to identify and understand the feelings of another person.

ASOA  
YOUR PRACTICE. OUR PASSION.

122

CULTURE INSPIRATION 

**"If a brand doesn't live on the inside ... it can't thrive on the outside."**

**- Libby Sartain**

123



**Be The Change**



**Invite Your Team to Be  
Apart of Something  
Bigger Than  
Themselves**

124



125



126




127




128



# LEARN HOW TO BE HAPPY AT WORK



“Happiness at work has since taken on new urgency for employees and managers, as workers leave jobs at record rates and rethink their goals. Many companies are scrambling to boost morale, reduce turnover, experiment with new ways of working—and even offering wellness retreats for employees.”



Harvard Wants M.B.A.s to Learn How to Be Happy at Work” By Lindsay Ellis, Feb. 14, 2022

129



**“Don’t Underestimate the Power of FUN & LAUGHTER”**

130



131

**BREAKOUT SESSION #2 – WHAT CAN YOU DO NOW?**

**ASOA**  
YOUR PRACTICE. OUR PASSION.

**BREAKOUT SESSION**

- Identify 3-5 Ways You Can “Engage The Heart” within Your Practice.*
- Identify 3-5 Ways You Can Introduce Some FUN into Your Practice.*
- What Can You Do NOW To Become a Situational Leader? How Will You Hold Yourself Accountable?*

**15:00**

132



**Part 4**  
**Culture in the  
Real World**

*Ben Seals, MBA*  
*Bill Koch, COE, COA, CPC*

133



CULTURE IN THE REAL WORLD

**If I had a culture do over in  
my career, I would ...**

134

CULTURE IN THE REAL WORLD 


**I wish I would have known  
THIS about culture earlier  
in my career ...**

135

CULTURE IN THE REAL WORLD 

**“Fantastics &  
Flops”**  
*Real World Experiences  
From Ben & Bill*


136



# Driving Practice Culture

*Ben Seals, MBA*  
Thomas Eye Group

137



## WHAT WE PRESENT

**A NOTE FROM OUR CEO**

Welcome to Thomas Eye Group. On behalf of the entire TEG family, we look forward to making a difference with you in the lives of the communities we serve.

All the best,  
Ben Seals

**THOMAS EYE GROUP**

### STAFF

**MISSION**  
To improve the quality of people's lives by compassionately providing a lifetime of outstanding eye care.

**VISION**  
To be acknowledged as Georgia's first and best choice for state-of-the-art, full-service eye care.

<b>C</b> <b>COMPASSION</b> Our dedication to serving the full spectrum of eye care needs throughout Georgia is delivered in a compassionate and professional manner with the intent of exceeding our patients' expectations.	<b>E</b> <b>EXCELLENCE</b> Our doctors and staff are expertly trained and resourced to deliver superior, quality patient experiences and results in each and every Thomas Eye Group location.	<b>O</b> <b>OWNERSHIP</b> Integrity and commitment to the highest level of professionalism guides all aspects of our work and relationships with patients, employees, vendors, and other health care providers.
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WHO WE ARE

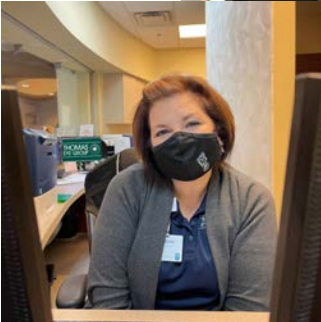
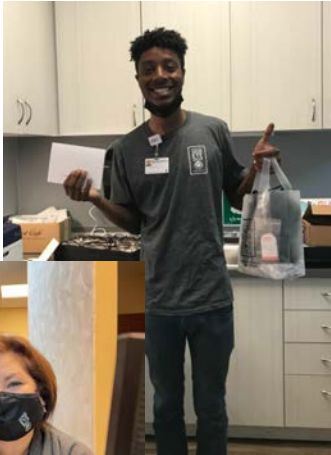


139

TEMP CHECKS

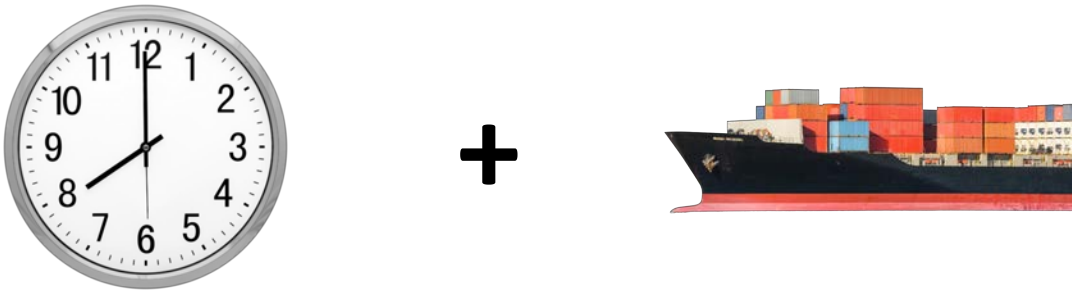



How do you measure and monitor culture?



140


CULTURE WON'T CHANGE OVERNIGHT



A slide titled "CULTURE WON'T CHANGE OVERNIGHT" featuring the ASOA logo in the top right corner. The main content consists of a round analog clock on the left, a plus sign in the center, and a cargo ship loaded with colorful containers on the right. The clock shows the time as approximately 7:30.


141

CASE EXAMPLE



Fantastic:  
Engagement team, post-COVID

Flop:  
Picnic for largest office in 2018



A slide titled "CASE EXAMPLE" featuring the ASOA logo in the top right corner. The text on the left lists "Fantastic: Engagement team, post-COVID" and "Flop: Picnic for largest office in 2018". On the right is a photograph of a red ball in the foreground on a green lawn, with a large, multi-story building in the background under a clear sky.

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144

## THE FLOP



- I asked a front desk staff member to do something.
- She said, can I please get to it in a couple minutes.
- I said - NO, DO IT NOW!

145

## THE EPIPHANY



- She pulled me into the break room and let me have it.
- I called a staff meeting.
- Did not go well for me.
  
- It is never fun to learn it is YOU and not them...




146

## THE "WE" CULTURE




- No "I" in team.
- Share in your failures.
- Share in your successes.






147

## THE FANTASTIC



- The experience led to a relationship with an Industrial Psychologist.
- Also known as an Industrial-Organizational Psychologist (IO).
- The IO psychologist helps the practice with:
  - ✓ Staff recruitment and selection.
  - ✓ Staff development and training.
  - ✓ Maintaining a mentally and physically healthy workplace.

***An industrial psychologist applies psychological theory to an organization, rather than an individual. Specifically, they look at how employees within the organization relate to their work environment.***



148



## THE FANTASTIC




- I took on management duties by default.
- I had previous management experience in retail.
- I learned the value of teamwork in a healthy culture.






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## THE FANTASTIC






- This was a turning point for:
  - ✓ Me
  - ✓ The staff
  - ✓ And my relationships with the staff.



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## THE MOST IMPORTANT THING WE LEARNED





Mutual Respect

- Inclusion for all
- Compassion
- Being a good friend
- Understanding differences
- Celebrating achievement
- Recognising individuality
- Valuing each other
- Teamwork
- Supporting each other
- Developing manners

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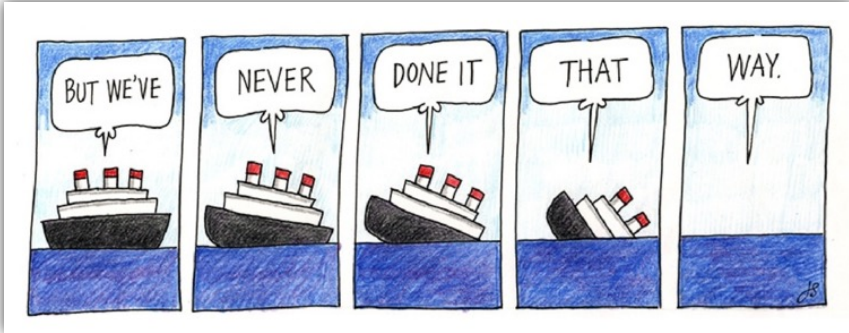
## RECOGNIZING INDIVIDUALITY



*I wish people looked like their personalities*


152

## THE ENEMY OF CULTURE CHANGE

153

## A REAL WORLD EXAMPLE



March 15, 2022

My newly hired technicians are reporting that they feel unwanted and picked on by the existing technicians. We have been actively working on our culture to decrease negative behaviors (whole organization) and keeping track of staff productivity to make sure everyone is equally pulling their weight (tech team).

As you all know, this can't continue in an environment when staffing is so limited. I'd like to say that this is a symptom of burnout/pandemic, but I've been working in healthcare to know this is the underbelly of any healthcare organization. I wish I could follow HR guidelines and move the offending staff out the door but in our current hiring environment, I can't.

Just to offer some context...I'd been hearing about this negative tech behavior off and on during my tech exit interviews, since I started working here, so with the doctor's support, I had the whole organization do a cultural survey (2021), then I worked 1:1 with staff that were identified as contaminating the environment (anonymous responses and across all departments including management and physicians) in Oct 2021 (initial results sharing) and Jan 2022 (1st session of 1:1 coaching). The one thing I quickly learned from doing the 1:1 coaching is that these staff have a significant blind spot when it comes to their behavior. Only one tech during coaching acknowledged their behaviors but said "this is who I am". All of the identified techs by the recently hired new techs are in coaching with me.


The doctors and I are so frustrated!. We have been actively working to improve exactly this. I feel like my hands are tied, what can I do? The clinical department meeting is on Monday and the doctors are planning to attend and talk to the staff (again).

Now, your turn...I need help...what have others done (besides firing these staff) to weed out this behavior? In my experience, negative staff tend to be "dead weight" to organizations; they are very comfortable and won't leave on their own. How can I increase their discomfort and try to work with them without them quitting (at this time). If staffing ever becomes easier, these folks will be moved out ASAP but for now, I have to work within this environment. All feedback is appreciated.

-----  
 Jojy Schless  
 Director of Operations  
 Geneva Eye Clinic  
 Geneva IL 60134

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## A REAL WORLD EXAMPLE



March 16, 2022

Hi Joy,


This can be a tough situation. A leader alone, nor can the doctors, fix this issue. It has to be approached from all sides. It took time, but we began holding our staff to be accountable, not only to themselves, but to each other. Our leadership team read a couple of books that were pivotal in my thinking as a leader (available as audio books as well, if you are tight on time). I recommend "Dare to Lead" by Brene Brown and "Hospitable Leader" by Terry A. Smith. We began having interactive "huddles" in the clinic that requires them to engage and interact with each other....lots of dialogue, team building, etc. As leaders, we used tools from these books to support and coach the staff of how to communicate better with each other. Learning to speak up and "call" each other on things in a healthy way breaks down passive aggressive behaviors from the pot stirrers. I know you don't have time to read these books before your meeting, but it may get your wheels turning a little bit. I have asked questions to tenured staff to gauge their contributions with new hires and students by asking themselves the question "What am I contributing each day that would make my teammate want to stay"? It is important for staff to understand that EVERYONE is responsible for culture, not just leaders. If they want to keep employees, they have to take ownership of what part they play each day in creating a positive and inclusive environment.

Hope this helps and good luck!!


-----  
 Mandy Cansler, COT, OSC, COE  
 Graystone Eye  
 Chief Clinical Officer  
 Hickory, NC 28601

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## CONCLUSION




- Teamwork
- Communication
- Accountability




***A healthy culture will hold itself accountable.***

156

OH, BY THE WAY



- The reason why the front desk staff member could not do what I asked her is because she was already doing something more important, that I asked her to do 5 minutes earlier.



157



.....


# Ask the Culture Experts

.....

*Team Boling, Ben Seals, Bill Koch*

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# Part 5

## Prioritization, Goal Setting & Review

*Team Boling*

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**BEGIN WITH THE END IN MIND** -STEPHEN COVEY

- CRYSTALLIZE THE VISION FOR YOUR DESIRED PRACTICE CULTURE.
- OUTLINE THE DETAILS - HOW WILL IT ALIGN WITH & SUPPORT YOUR PRACTICE PURPOSE?
- PLAN - WHAT NEEDS TO HAPPEN FOR THIS IDEAL VISION FOR YOUR CULTURE TO COME TO FRUITION?
- INTRODUCE & INVITE - CAST THE VISION, GARNER EXCITEMENT, GAIN BUY-IN, INVITE YOUR TEAM.

160

## ROADMAP: CONDUCT A SWOT ANALYSIS




# SWOT

- Strengths – **Internal**
- Weaknesses – **Internal**
- Opportunities – **External**
- Threats – **External**

161

## ROADMAP: PRIORITIZE SWOT FINDINGS



<b>SWOT MATRIX</b>	<b>Strengths</b> <i>Functions the group/team does very well <u>internally</u>.</i>	<b>Weaknesses</b> <i>Functions performed <u>internally</u> that are deficient in some way.</i>
<b>Opportunities</b> <i>Potentially favorable <u>external</u> conditions for the group/team.</i>	<b>Strengths/Opportunities</b> Goal: Pursue external opportunities that are a good fit with the group/team's internal strengths.	<b>Weaknesses/Opportunities</b> Goal: Overcome internal weaknesses to pursue external opportunities.
<b>Threats</b> <i>Potentially unfavorable <u>external</u> conditions for the group/team.</i>	<b>Strengths/Threats</b> Goal: Identify ways the group/team can use its internal strengths to reduce its vulnerability to external threats.	<b>Weaknesses/Threats</b> Goal: Establish a defensive plan to prevent the group/team's internal weaknesses from making it highly susceptible to external threats.

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**ROADMAP → BUILD YOUR PLAN**



**Strategic Priority**



Area of Focus, Desired Objective.

*"Where do I/we need/want to go?"*

**SMART Goal**



Specific, Measurable, Achievable, Relevant, Time-Based.

*"How do I/we know when I/we have arrived at our desired destination?"*

**Tasks/Tactics**



Tasks/Tactics lay out duties/initiatives required to drive progress towards the SMART Goal (your to-do list).

*"What will I/we do to get there?"*



# The Anatomy of Purpose-Driven Goals

163

**ROADMAP → SET PURPOSE DRIVEN GOALS**





**“Strategic Priority”**  
Long-Term Mission/Vision Aligned

---

**“Goals/OKRs”**  
Mid-Term Goals

---

**Initiatives/Tasks**  
Short-Term Goals & Daily To-Dos




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## ROADMAP → MAKE THOSE GOALS “SMART”





165

## ROADMAP → BREAKIN' "SMART" DOWN



# S


**Specific**



- What needs to be accomplished?
- Who will accomplish it?
- How will they accomplish it (steps to take)?

# M


**Measurable**



- Quantify the goal to track progress.
- Incorporate numbers and benchmarks.
- Know when you've achieved the goal!

# A


**Achievable**



- Goals should be realistic and within reach.
- It is something you can control?
- This letter also sometimes represents "Attainable".

# R


**Relevant**




- Why does this goal matter?
- What's the impact of accomplishing it?
- How does it feed into the bigger picture of the Practice?

# T

**Time-Based**




- Goals shouldn't stretch to infinity.
- Goals should have a deadline.
- Provides accountability and prioritizes the goal accordingly.



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**Tips & Tricks for Piloting Culture Initiatives in Your Practice**



- **Identify Practice Culture Goals**
  - ✓ Cultural Assessment w/ SWOT
  - ✓ Culture MAP - Define Desired Practice “Feel” → Be Specific!
  - ✓ Timeframe for Overhaul (Hint: It won’t happen overnight!)
  - ✓ Plan Each Initiative – It’s all in the details!!! Be Creative. Have Fun!
    - Goal for each initiative (What is your desired outcome for EACH SPECIFIC initiative?)
    - Timeframe for each initiative (I usually start off with a month-long pilot, depending on the complexity of the initiative)
    - Budget for each initiative (Hint: many ideas cost nothing!)
    - Implementation Plan (Define the Who, What, When, Where, Why & How)
    - Lay Out Your Follow-Up Plan ... Then Stick to It! There’s nothing worse than a Pilot initiative that isn’t tracked ... know if/when you’re successful!
    - Review, Refine, Repeat. As many times as necessary.

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**Tips & Tricks for Piloting Culture Initiatives in Your Practice**



- **Get Buy-In from Key Team Members (Managers, Docs, Natural Leaders, etc.)**
  - ✓ I started by...
  - ✓ This is what we want and I committed more initiatives, The...
  - ✓ We have passion & excitement for our “New Day”
- **Don’t allow yourself to be human, your team will follow suit! For us ... It’s WORK HARD, PLAY HARD!**

**Leadership Buy-In is KEY!**

**Have fun! Be Positive. Keep Pushing Until You Reach the Culture You Want ... And Then Protect It! And Prioritize It!**

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## ROADMAP → PRIORITIZED ACTION ITEMS

**To-Do List (Notes, Ideas, Reminders)**

- Next 7 Days
- 30 Days
- 60 Days
- 90 Days
- 6 Months
- 1 Year

15:00

**What do you want to ACT ON in the next 7 days?**

**What do you want to ACT ON in the next 30, 60, 90 days?**

**What do you want to ACT ON in the next 6 Months, 1 year?**

**Be SMART – Specific, Measurable, Achievable, Relevant, Time-Based.**

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## MATERIAL REVIEW – WORKBOOK

### The Intentionality of Creating an AMAZING Practice Culture

*A Self-Guided Workbook*

**What's Next?**

Now that you've defined your Practice "Basics", you can now enter a "planning" phase for your practice with intentionality and focus (Boling Vision Center's "Secret Sauce"), which often starts with a SWOT Analysis. If you haven't performed a SWOT before, don't worry. You're not alone. SWOTs are an excellent tool to help your Practice grow and focus on annual goals and objectives, and we'll introduce you to this important process below.

**What is a SWOT?**

A SWOT analysis is a planning tool that, when used properly, provides an overall view of the most important factors influencing the future of the group/team/department/organization. The SWOT analysis is the foundation for a reflective self-assessment of how your group/team/department/organization is performing in its mission. The SWOT analysis results form the basis for developing recommendations and action plans. These recommendations and action plans take into consideration many different internal and external factors that maximize the potential of the practice's strengths and opportunities, while minimizing the impact of its weaknesses and threats. This approach can help ensure the efficient use of resources to provide beneficial program outcomes. A SWOT analysis enables proactive thinking rather than habitual or instinctive reactions.

A SWOT analysis is one of several tools for assessment and planning for group/team/department/organization. This workbook is meant to help understand the general SWOT analysis process and get you started on the right track.

**Benefits of a SWOT Analysis**

A SWOT analysis is a simple, but powerful, framework for leveraging strengths, improving weaknesses, minimizing threats, and taking the greatest possible advantage of opportunities.

**SWOT analyses have several benefits:**

- Opportunity for collaboration on strategic plan formulation.
- Incorporates many different internal and external factors.
- Structured process that allows for a thorough idea gathering.
- The posting of the ideas vs. the yelling minimizes the reactionary processing and group mentality from occurring.
- Participants who may traditionally be quiet and participate less, are encouraged, and have the ability to participate in a process which is friendly to their needs.
- Allows the ability for "dominant" (overly vocal participants) of the process to be equalized - but not eliminated.
- Responses are prioritized within each category by importance, giving us a clearer understanding of their most pertinent topics and areas to address.


*Blank SWOT Template*

Strengths	Weaknesses
<div style="background-color: #004a7c; color: white; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> <span style="font-weight: bold; font-size: 1.2em;">SWOT</span> </div>	
Opportunities	Threats

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# MATERIAL REVIEW – WORKBOOK



**How are the Results of a SWOT Analysis Used?**

A SWOT analysis is a subjective assessment of data that is organized into a four-dimensional SWOT matrix, similar to a basic two-heading list of pros and cons.

SWOT MATRIX	Strengths	Weaknesses
<p><b>Opportunities</b> Potentially favorable external conditions for the program(s).</p> <p><b>Threats</b> Potentially unfavorable external conditions for the unit.</p>	<p>Features the group/team does very well at/possesses.</p> <p><b>Strengths/Opportunities</b> Goal: Focus on opportunities that are a good fit with the group/team's strengths.</p> <p><b>Strengths/Threats</b> Goal: Identify ways the program can use its strengths to reduce its vulnerability to external threats.</p>	<p>Features perceived negatively that are deficient in some way.</p> <p><b>Weaknesses/Opportunities</b> Goal: Overcome weaknesses to pursue opportunities.</p> <p><b>Weaknesses/Threats</b> Goal: Establish a defensive plan to prevent the group/team's weaknesses from making it highly susceptible to external threats.</p>

Group/team members can translate the four lists into a matrix (see above) that associates strengths (maintain, build and leverage), opportunities (prioritize and optimize), weaknesses (remedy/fix), and threats (counter/avoid) into actions that can be agreed and owned by the group/team/department/organization.

**What's Next?**

The SWOT analysis should result in a prioritized list of the matters that are the most pertinent for the group/team/department/organization to focus on in the near future. These will form the basis for any Strategic Priorities (Areas of Focus / Desired Objectives), which will help you develop SMART Goals with corresponding long-term, mid-term & short-term goals (may also be referred to as OKRs - Objectives & Key Results), Action Goals, Implementation Plans, Follow-Up Surveys, Standard Operating Procedures, etc. Please note, many of these concepts will not be discussed in today's Deep Dive due to time constraints, however, they are critical concepts to develop and maintain as you create your AMAZING Practice culture.

**Strategic Priority**

Area of Focus, Desired Objective

"Where do I see myself going to?"

**SMART Goal**

Specific, Measurable, Achievable, Relevant, Time-based

"What do I see myself doing that will get me there?"

**Tasks/Tactics**

Tasks/Tactics for your chosen initiative as required to fulfill your SMART Goal

"What will I see myself doing to get there?"

Now you can prioritize list (the outcome of your SWOT Analysis) to 3-4 total Strategic Priorities (Areas of Focus / Desired Objectives). For each of these Strategic Priorities, define up to 5 SMART Goals that, when met, confirms that you've successfully reached/completed the Strategic Priority. Each of your SMART Goals can then be broken down even further into 8-12 Tasks/Tactics that can then fill your "To-Do List" in the short-term. In short, just remember that even your biggest priorities can be broken down into smaller steps, which helps you stay motivated and focused on the prize on a daily basis.

**\*\*\*Read more on these concepts in the attached AE Article, "Your Recipe for Success", in the back of this workbook.**

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### SMART GOAL Template

**GOAL Description**

Goal Type (Select One):  
 Milestone     Intermediate     Mini

**S**

Specific

**M**

Measurable

**A**


Achievable


**R**


Relevant


**T**


Time-based













Notes, Thoughts, Ideas, Reminders:

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# MATERIAL REVIEW – WORKBOOK



RUNNING THE PRACTICE // ADVICE FOR NEW ADMINISTRATORS



## YOUR RECIPE FOR SUCCESS

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Hillman are each more ingredients of the daily recipe. You can't eat the recipe to develop delicious and consistent your ingredients of the kitchen cookbooks. You can't eat the recipe for the perfect cookies to eat all that different from the recipe for success for new administrative administrators. Some of the recipe already exist in the documented policies and procedures of your practice. But sometimes you need a new recipe from scratch.

Happy Billing, MBA, CMAA Winter 2020

## Strive for AMAZING

A Crash Course in Building a Culture of AMAZING

**Why Focus on Culture?**

"Culture isn't just one aspect of the game... it is the game!"

**A Glance at Engagement**

"Employees who are not engaged have untapped potential that is lost to the organization."

**Invest in Practice Culture**


"Culture eats strategy for breakfast." - Peter Drucker

**Of course, Drucker didn't mean that strategy wasn't important, and it's no way implying that you should lose focus of your practice's strategic planning, goal setting, benchmarking, or doing the critical day-to-day elements of running your practice. We are simply pointing out the human factor in your practice's success, and the fact that no matter how detailed and impressive your strategy may be... the people are ultimately the ones who must execute the strategy, which is why a strong and empowering culture is critical to long-term success.**

When building a business case for investing in your practice's culture, the following benefits will also result when a strong and intentional culture is in place:

- Strengthen employee recruitment & retention efforts
- Build employee loyalty & reduce involuntary turnover
- Engage employees lead to better service and patient care
- Guest Experiences will improve due to the better service, thus improving satisfaction scores
- Increase employee performance & ultimately improve productivity levels
- Boost financial performance

RUNNING THE PRACTICE // ADVICE FOR NEW ADMINISTRATORS



## LEAVE "SATISFYING" TO YOUR COMPETITORS— INSTEAD, GO FOR "AMAZING"

Happy Billing, MBA

**Of All Things, I'd Like to Practice Expectations are Higher than our Own**

**Of All Things, I'd Like to Practice Expectations are Higher than our Own**

**Of All Things, I'd Like to Practice Expectations are Higher than our Own**

**Of All Things, I'd Like to Practice Expectations are Higher than our Own**

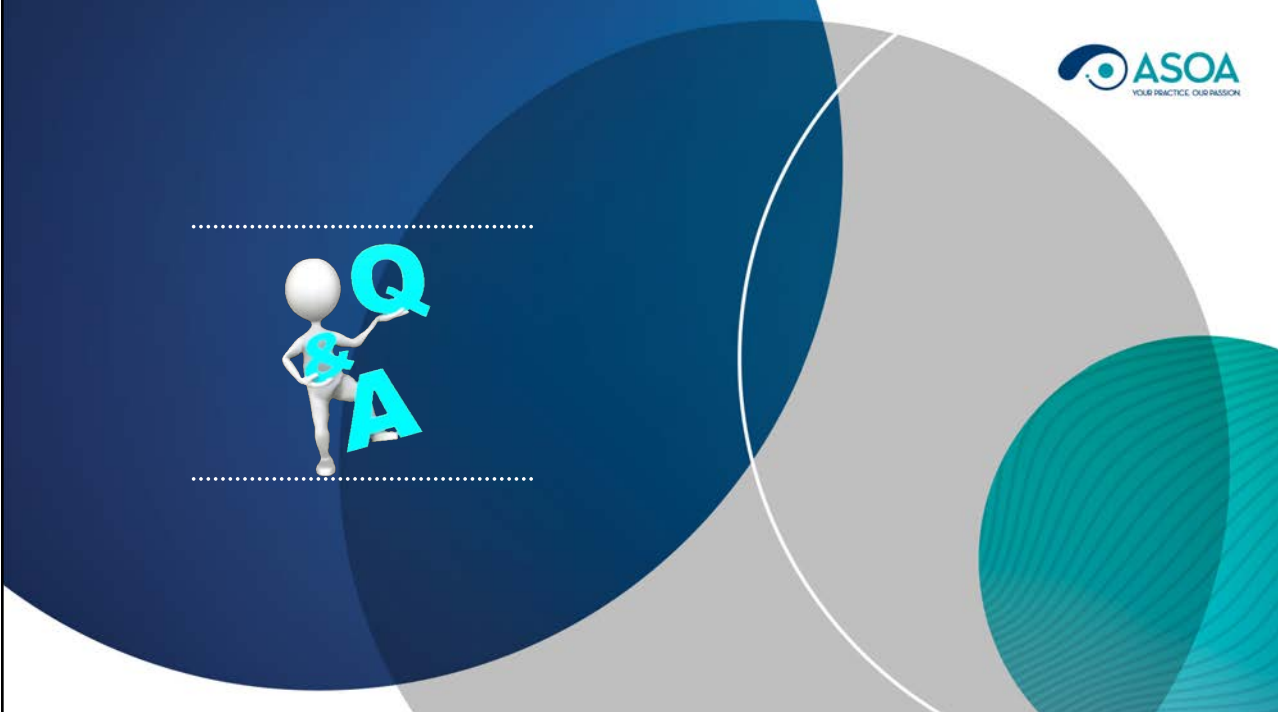

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# DEEP DIVE REVIEW



- 1 Into to Culture
- 2 Practice Purpose
- 3 Cultivating Culture
- 4 Be the CHANGE
- 5 Culture in the Real World
- 6 Review & Prioritization

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**THE “WHY” – YOUR PRACTICE COMPASS** 



**1 Degree Matters!**

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**CLOSING REMARKS** 

Restore Hope *Encourage others* RELATIONSHIPS  
 Love People take risk **LIVE YOUR VALUES** SERVE  
 LEAD *engage* BELIEVE **BE BOLD AND COURAGEOUS**  
**DETAILS MATTER** LAUGH *REAL*  
 REMOVE LIMITS **AMAZING** BOOKS  
*Integrity* INNOVATE HONESTY DREAM GIVE HONOR  
 release mediocrity *Change the World* excellence  
**SEE COLOR & LOVE IT** **GENEROSITY** *Fear not*

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CULTURE INSPIRATION 

**“Corporate culture is the only sustainable competitive advantage that is completely within the control of the entrepreneur.”**

**– David Cummings**

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CULTURE CHALLENGE 

- Be Intentional! Stay Focused! Every. Single. Day.
  - ✓ People
  - ✓ Planning
  - ✓ Performance
  - ✓ Policies/Processes/Procedures
  - ✓ Pursuit of Goals
- Build Trust - Communicate Early & Often! Provide the “WHY” behind the “WHAT”. Apologize when appropriate.
- Employ Situational Leadership.
- Practice Continuous Improvement. Always.
- Humanize Leadership – Never Underestimate the Power of FUN & LAUGHTER! SEE People as human **BE**ings ... Not human **DO**ings.
- Engage the Heart. Provide Purpose. Create Community.
- Never Stop Cultivating **AMAZING**.



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