# *Building your LVC team*

STAFF TRAINING & DEVELOPMENT

1

VISX university

PRACTICE DEVELOPMENT PROGRAM

# Welcome to the VISX University® Practice Development Program

*This comprehensive program has been developed for you by the leaders in laser vision correction—the experienced team that brought you VISX University.*

The Practice Development Program (PDP) is intended to supplement and support the high level of service provided by VISX® Business Development Managers (BDMs). In conjunction with your BDM, the PDP will instruct you in proven principles of effective marketing and business and will offer specific, actionable advice for building your own practice.

## *Program structure*

The program is focused on three areas critical to the success of any practice, referred to in the program as core competencies. Each core competency is presented as a series of concise, content-rich learning modules.

**Branding:** How to effectively define your practice in the minds of consumers; how to plan, budget, and build effective internal and external marketing programs, and assess your brand impact in the marketplace.

**Sales cycle:** How to improve patient processing, from the initial patient call and consultation through post-operative follow-up; focuses on proven techniques for handling laser vision correction (LVC) phone calls, consultations, patient seminars, and learning from patient input.

**Staff training and development:** How to build a strong LVC team, train your team to be effective, and keep your team motivated.

## *How to make best use of the program*

- Work with your VISX BDM to:
  - assess your practice's strengths and weaknesses by completing the Practice Assessment
  - develop a *Procedural Growth Plan* indicating which PDP modules will be most helpful for your practice
- Read module content carefully and refer back to it often
- Complete all worksheets
- Work with your BDM and your staff to develop appropriate *Action Plans*
- Evaluate your progress against your *Action Plan* regularly
  - update your *Action Plans* quarterly
  - implement corrective action as necessary to keep the practice on track toward your established goals

## *How to reach your VISX BDM*

To reach your BDM by telephone, please call 1-800-246-VISX and ask to be connected to the extension of the BDM in your region.

# Building your LVC team

## *Introduction to the module*

### *Overview and goals*

*Building your LVC team* is the first module in the *Staff training and development* core competency and covers:

- What is an LVC team
- Why staff training is important to the LVC practice
- What your LVC team needs to know
- Training and development recommendations for an LVC team

Upon completion of this module, you will be able to:

- Describe the staff knowledge and skills needed to support an LVC practice
- Explain the basic sales skills staff need to work effectively with prospective LVC patients and current patients
- Create an action plan for developing and training your staff
- Measure the impact of staff training and development efforts on your practice through a variety of evaluation methods

To support these goals, you will also learn:

- The function of the roles on an LVC team
- The difference between a prospective patient and a patient
- What topics your staff should receive training on
- How to provide incentives for staff development
- What areas to measure as you evaluate your training and development plan

### *Key concepts*

- An LVC team is organized and trained to handle the patient care, sales, marketing and customer service responsibilities that support an LVC practice
- It is important to clearly define the roles and responsibilities of each team member to avoid conflict and confusion on the team
- Offering educational and training opportunities for all aspects of your team's jobs will enable your team to perform at their best
- An LVC team should be trained in basic sales skills to support the needs of your practice
- Team members benefit from education and training that take place in both formal and informal settings
- Using incentives can help motivate your staff to meet goals
- Ongoing evaluation tracks the progress of your training and development efforts and gives you the information necessary to make improvements

## *Materials*

- Defining Your Team
- Practice Assessment
- Answering Patient Questions
- Action Plan
- Evaluating Your Success
- Samples:
  - Training Agenda
  - Goal Board

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CHAPTER 1

# The LVC team

An LVC team is a group of staff members dedicated to supporting laser vision correction services in a practice. Besides handling traditional patient care responsibilities, this team is organized and trained to carry out the additional sales duties required of an LVC practice.

Just as the LVC business can be managed as 'a business within a business,' that is, measured separately from the other services your practice provides, the LVC team can be considered 'a team within a team.' Think of the LVC team as a group of staff members with distinct LVC team roles and responsibilities who are organized to support laser vision correction while continuing to serve patients visiting the practice for other services.

While it is helpful to have a dedicated LVC team focused on the care and follow-up of LVC patients, it is the entire practice's responsibility to support the laser vision correction business. All practice staff, whether or not they are considered part of the core LVC team, should be able to answer basic LVC questions and direct interested prospects to the LVC team.

## Why create an LVC team?

Because patients have many different options for laser vision correction, superior service is needed at all points of contact with LVC patients. Having a team that can deliver that level of service is vital to the practice's success.

Unlike traditional medical practices, LVC practices need specialized staff members who can focus on meeting sales and customer service goals, and who can coordinate and market LVC programs.

Forming a dedicated, well-trained LVC team will equip your practice to handle the patient care and sales responsibilities that will help your LVC practice grow.

## Who is on an LVC team?

In addition to having knowledge of the practice's sales and patient care processes, each person on an LVC team should have a good understanding of their own role, and the roles and responsibilities of others on the team. To facilitate this understanding, every team member should have a written job description that clearly defines the responsibilities and duties of their role. The success of your team is dependent on each team member understanding their role and supporting the other members in delivering a quality patient experience.

The following list shows several typical staff roles; however, the roles you need on your own team may vary:

**TIP**

Make sure that staff members have adequate time and resources to perform well. Don't wait until you have a problem before hiring another person or redistributing responsibilities. Check in with your team frequently to determine when staffing levels should be adjusted to meet the demands of your practice.

### Doctor

Performs medical examinations, screenings, and procedures, and is responsible for informing prospective patients whether or not they are good candidates for LVC. May present seminars to prospective patients. May also be the director/administrator.

### Director/Administrator

Directs and manages the practice and team on a daily basis, ensuring proper implementation of roles and responsibilities.

### Marketing director

Coordinates and develops LVC marketing, including placing advertisements, and organizing seminars and other programs. Builds the practice's brand via internal and external marketing programs. In smaller practices, these responsibilities may be performed by the LVC coordinator.

### LVC coordinator

Coordinates LVC programs, including management of LVC inquiries, tracking levels of contact, and coordinating OD/MD referrals. May also coordinate and develop LVC marketing, including placing advertisements, and organizing seminars and other programs.

### Refractive technician

Assists with LVC evaluations, screenings, and seminars.

### Telephone operator

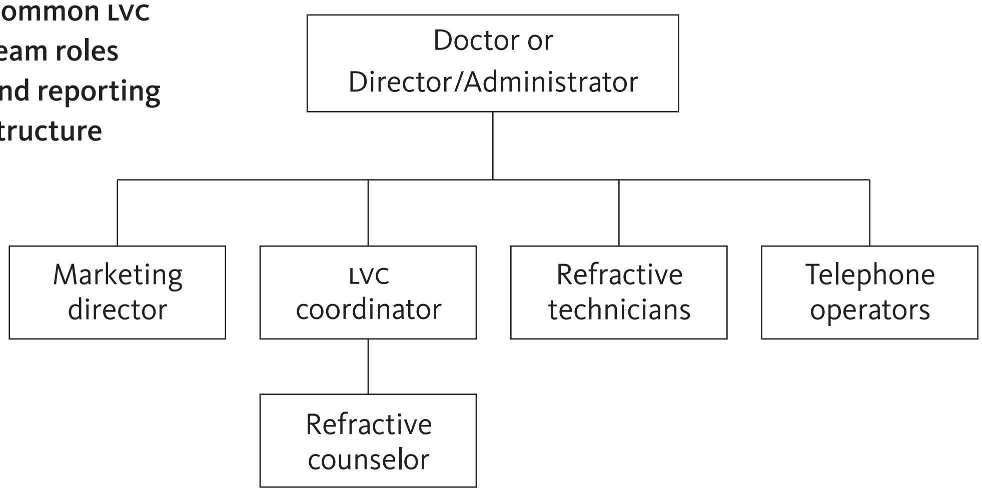
Receives call inquiries, performs data entry, and schedules appointments with patients and prospective patients.

### Refractive counselor/Patient counselor

Performs screening evaluation, schedules pre-op appointments and surgery dates, and uses and updates database.

In this module, when we refer to a job title (e.g., LVC coordinator), we are actually referring to the role that such a job title would perform. The roles on

**Common LVC team roles and reporting structure**



your LVC team may be titled differently depending on the needs of your practice. Also, certain LVC roles can be combined; for instance, marketing director responsibilities could be performed by an LVC coordinator in a small- to medium-sized practice. As your LVC practice grows, you may find that certain roles need to be expanded or filled by a dedicated staff member.

Cross-training your LVC team is essential. Every person on the staff should be able to contribute as needed to key LVC responsibilities, even if the responsibilities are not the main function of their day-to-day job.

The LVC team should receive enough training to be able to handle the basics of these functions:

- Clinical duties
- Lead tracking
- Sales
- Education
- Counseling
- Candidate identification
- Scheduling
- Marketing
- Business development

In an LVC team, the entire staff is charged with obtaining LVC growth results. This can happen only through the cooperation of every member of the team. To increase patient satisfaction and referrals for the LVC business, it is the responsibility of each team member to ensure that:

- They achieve the highest levels of performance and quality in their specific LVC role
- Each patient contact is managed with enthusiasm, warmth, kindness, and respect for the patient's rights as an individual

***TIP***

By cross-training your entire LVC staff, you enable team members to contribute when and where needed. Then, when a person is absent due to illness or vacation, the practice will be able to function despite that person's absence.

CHAPTER 2

# Creating your LVC team

## Step 1: Define your plan

A fully staffed LVC team will be equipped to handle both the patient care responsibilities of a traditional medical practice and the additional sales duties of an LVC practice. In order for your practice to achieve set LVC goals, a staffing plan must be in place that meets both the demands of an LVC practice and the other services you provide.

### *Determine which LVC roles make sense for your practice*

What LVC roles fit within your practice? Create a staff chart that shows the relationships between each role on the team. This chart should show the reporting structure for the different roles (who reports to whom), and any departments that you form within your team, such as 'Clinical Services' or 'Marketing.'

### *Write job descriptions for each LVC position on your team*

Each position on your LVC team should have a written job description. A job description provides a clear, concise definition of the responsibilities, duties, and qualifications for a role. Staff members can use job descriptions to help understand the scope of their role and duties, as well as clarify what others on the team are responsible for. Job descriptions can also assist in hiring, as the information in a description defines the qualifications, education, and experience a candidate for the role must possess.

As you write job descriptions for your LVC team, be careful not to give too many key responsibilities to any one person. Each staff member should be focused on a manageable and defined set of responsibilities within their area of expertise. This focus enables the team member to perform at the highest level possible in their role and to provide the best customer care to patients.

## Step 2: Refocus your existing staff

One of the most important responsibilities of an LVC team is to ensure that the practice's medical resources remain focused on LVC candidates with a high likelihood of having the procedure. This function is critical to the efficiency, and therefore the success, of your LVC practice.

If you have recently made the transition to offering LVC in your practice, it is important that your staff understands the difference between a *prospective* LVC patient and an LVC patient.

People who have never visited your office as patients will be coming in to learn more about laser vision correction. These people are *prospective patients*: you don't yet know how interested they are, whether they are good physical candidates, or whether they have the means to afford the procedure.

Working with prospective patients is a sales process—that means uncovering and addressing patient needs, assessing their psychological candidacy, and exploring their ability to pay for services—and is distinct from the medical process and patient care that may come later.

Your staff's ability to identify and filter out prospective patients who are poor candidates for LVC is critical, as it will enable your team to dedicate more time to prospective patients who have a strong and immediate interest in the procedure and less time to those prospective patients who are not as interested.

Once a prospective patient has decided to move forward with an exam or screening, they become a patient and the patient care process begins.

Traditional patient care will be as important to your practice as it was before LVC was added, but the sales process of an LVC team brings another level of responsibility to your staff's duties. You may find that some individuals on your staff may not have the skills to handle these new responsibilities. Assess your staff to determine if they are able and willing to perform the sales duties that are necessary to support the LVC practice.

If some of your staff members aren't ready to make the transition to sales, you might consider asking them to support other areas of the practice. However, it is advised that all the staff members of your practice be trained to discuss LVC and pro-

## *Prospective patient versus patient*

| SALES PROCESS | PATIENT CARE PROCESS |
| --- | --- |
| *Staff sells LVC and takes care of prospective patient needs* | *Staff takes care of LVC patient needs* |
| **Prospective patient** | **Patient** |
| Meets with LVC team members to discuss LVC and why they should choose your practice | Meets with doctor and has an exam, screening, or procedure |

vide a consistent message and quality of service to your patients.

### *Get the right people in the right positions*

It is important to select people with the right skills and aptitude for the roles needed on your team. This means that staff who are great at sales should be placed in roles where that is a main responsibility. Keeping staff members who are excellent at patient care, such as a refractive technician, in a role where they will continue to succeed is also important. In any case, all staff should be cross-trained in both patient care and sales processes so that they can support their team when and where necessary.

## Step 3: Who do you need to hire?

Do you already have all the right people to make a great LVC team? The roles and responsibilities for the LVC team require unique skills. Your existing staff members might not have the skills needed for the new position, or they might have their hands full with their current duties.

Take stock of the positions still needed to create a fully staffed LVC team, and set about hiring them. Use the job description for each position you will hire for to help you write job postings, or want ads, for the job.

**WORKSHEET**
*Defining Your Team*

Take time to define an LVC team for your practice. Compare this with the recommended LVC team presented in Chapter 1. Be sure to share and discuss your worksheet with your BDM. (If you did not receive this worksheet with your PDP materials, it is available online at www.visx.com or from your BDM.)

**WORKSHEET**
*Practice Assessment*

If you have not already completed an assessment of your practice, take some time to do so. Pay particular attention to the Staffing and Staff skills sections of the assessment while you are working in this module. Share and discuss your completed *Practice Assessment* with your BDM. (If you did not receive this worksheet with your PDP materials, it is available online at www.visx.com or from your BDM.)

CHAPTER 3

# What your team should know

There are many things an LVC team needs to know to run smoothly and effectively. The most important topics can be organized into five broad areas:

- Practice philosophy
- The LVC procedure
- Team roles and responsibilities
- Practice processes, technology, and systems
- Basic sales skills

CONSIDER: How well does your staff know these topics? What training are they currently receiving in each area? Is your staff as prepared as they need to be?

## Practice philosophy

Team members involved in the creation of the practice philosophy will be more supportive of the practice's direction, so it's a good idea to involve your staff in this process. Your team should know and understand the practice philosophy, including:

- Mission – the overall philosophy of care for the practice, how you define your practice
- Goals – the specific objectives of the practice that support its mission
- Strategy – the plan for achieving the practice goals
- Brand – the image the practice wishes to project

Staff should be committed to the practice philosophy, and understand that LVC has the potential to make a positive difference in people's lives. In order to provide a consistent message to your patients, each person on the team should be able to answer the question 'How does LVC complement or support the services we currently provide?'

## The LVC procedure

An LVC team's knowledge of laser vision correction is of utmost importance in instilling a feeling of confidence in your prospective patients. Each staff member must be able to explain:

- What LVC is
- What vision conditions LVC can address
- Which LVC procedure is performed by your practice
- The benefits of LVC
- How LVC is performed

Your prospective patients need to believe in your staff's competence in providing LVC services, and a knowledgeable staff can go a long way in gaining their confidence. Your team members don't all have to be LVC surgical experts, but they should be able to speak intelligently about the basics.

Additionally, each staff member should understand and be able to answer questions about all the refractive and vision correction options available, even if you don't provide every service at your practice. Your staff will seem more knowledgeable if they are able to speak about the features and benefits of each option, without sounding as though they are only trying to sell the services your practice has to offer.

Some ideas for helping your staff learn about LVC:

- Provide your staff with LVC reference materials that they can study
- Have each team member spend time viewing LVC procedures and assisting during the consultation process so they understand a patient's view of the process
- Devote time in each LVC staff meeting to discussing new LVC topics and issues
- Ask each staff member to keep a record of all the questions they hear from prospective patients; from these questions, create a frequently asked questions log that you update periodically and distribute to your staff
- Surgical staff should keep their LVC skills updated by taking courses on LVC procedure topics
- Hold role-playing sessions so that your staff can build their confidence in answering common questions for prospective patients

***EXERCISE***

*Answering Patient Questions*

Practice is critical to your success, so we recommend that you take time with your team to rehearse answering frequently asked questions. Share your process and results with your BDM. (If you did not receive this worksheet with your PDP materials, it is available online at www.visx.com or from your BDM.)

## Team roles and responsibilities

On the LVC team, everyone has an important role to play, from staffing the front desk to performing the actual procedure. Clearly define the roles and responsibilities of each team member through job descriptions and written procedures to avoid conflict and confusion.

Rethink how you deliver service along each step of the way. Envision it as a process. What happens to the patient in each room; which staff member is talking to them, and about what? Team roles, working in conjunction with your team processes, should create a carefully choreographed patient flow that is well planned yet invisible to your patients.

There are a few things to remember as your team learns its responsibilities and processes:

- Ensure a consistent level of service. The level of service should be the same regardless of what stage of the process the patient is in and what staff member is with the patient.
- Don't be redundant. Make sure your team process for interacting with patients is well-choreographed and that steps in the process are not being repeated by multiple staff members. The best way to prevent duplication is to ensure that everyone on your team knows what other team members will say and do throughout the patient management process.
- Be sure to cross-train staff. Cross-training of all staff in key areas is necessary so that each person can contribute whenever and wherever they are needed.

## Practice processes, technology, and systems

Staff members will be most effective if they have a clear understanding of the process to be followed during each type of patient contact in your practice. Think about the following patient interactions, and provide your staff with written descriptions of the process steps you would like them to follow:

- Initial telephone inquiries
- Seminars
- Screenings and consultations
- Financial discussions
- Informed consent
- Pre-op instruction
- Post-op instruction

Arrange for each member of the team, including doctors, to witness each step in the process as an observer. It is important that each staff member understands the entire LVC process from beginning to end.

Make sure all LVC staff members are familiar with all of the support materials and forms that patients will use so that they can answer questions and offer guidance to patients at any time.

Each person on your staff should be adequately trained on the technology and systems they are to use. Beyond ensuring that doctors and technicians have proper training on their tools, what are the tools each of your staff members need to use to be successful? Database systems, word processing software, financial software, phone systems, and other technology are also systems that your staff must be trained on if their job functions rely on them.

**TIP**

Create a binder with all basic practice information for new employees to read. Assign someone the duty of updating this binder to ensure that it remains current.

## Basic sales skills

Because LVC is an elective procedure, the success of your LVC practice is inherently dependent on sales. Your staff is your best and most effective sales tool, which is why it's so important that everyone on your team is well trained in sales techniques.

Staff members may be resistant at first to the idea of selling to patients, thinking that it implies an effort to talk someone into buying a service they don't really want. Be sure to explain that selling, in the context of LVC, simply describes the process of uncovering and satisfying patient needs – a process that benefits both the patient and the practice.

A prospective patient will commit to having LVC only if they can envision the benefits they will receive from it and feel that the procedure will meet their needs. Everyone on the LVC team needs to be able to encourage and facilitate this sales process to help the LVC practice grow. And in order to do that, they need to know how to communicate effectively, how to assess a patient's motivation and interest, and how to identify and address a patient's needs.

### *Establishing good communication*

When communicating with prospective patients, your staff members will be effective only if they are understood by the patient, are accepted by the patient, and work to understand the patient in return. One of the best ways to put your staff at ease and to facilitate trust between staff and prospective patients is to ensure that your team members are confident about their role and what they know. Thorough training can pay off in terms of increased team member confidence, with the result of better communication with patients.

## *Sales communication skills*

Each person on your LVC team should know how to:

- Listen — One of the most important skills a salesperson must develop is the ability to listen effectively. The main reason prospective patients consider placing their trust in a practice is because they feel the staff listens to them; they believe you can fulfill their needs and wants.

- Probe — Uncover prospective patient needs, and gather background information to help you understand their situation and associate their needs with the benefits of LVC.

- Handle objections and close — Handling objections, and closing (i.e., getting the patient to buy the service) are at the heart of the selling process.

- Understand buying decisions — Knowing what type of communication to use at different stages of a prospective patient's thought process can help you assist them in reaching a buying decision more quickly.

For more information on training your staff on these skills, check with your BDM regarding upcoming VISX University® Seminar and Fast Track courses.

### *Assessing patient motivation and interest*

To provide the best customer service possible and help prospective patients realize the benefits of LVC for their particular situation, LVC team members need to understand what motivates patients and the level of interest they have.

The main reasons patients give for having laser vision correction are:

- Dissatisfaction with appearance in glasses
- Intolerance to contact lenses
- Fear of an emergency without vision correction
- Sports lifestyle considerations
- Occupational considerations

Of course, every prospective patient has their own unique motivation, and although they may not say it directly, their motivation is often tied directly to their chief complaint. That's why it's important to document what brought each prospective patient to see you and what they say needs to be addressed.

Your staff's ability to assess a patient's level of interest in LVC is equally important. By answering a couple of questions for prospective patients—and carefully listening to a patient's responses and additional questions—your staff can gain insight into a patient's degree of interest. Some practices rate a patient's level of interest (e.g., mildly, moderately, or very interested) and record the information on their patient intake form. The two questions on every patient's mind are:

- *What's in this for me?*
  The prospective patient needs to know the potential LVC benefits that will address their visual needs.
- *Why should I choose you?*
  The prospective patient is asking about the difference in service your practice offers compared to other practices and what qualities make your practice unique.

With the ability to gauge a prospective patient's level of interest comes the responsibility to accept when LVC or your practice does not offer the vision correction solution that they are looking for. Prospective patients should not be pushed when interest in LVC isn't there or it doesn't feel quite right to them. If a person is not a candidate for LVC, but they were impressed with the approach and care your team provided, they will probably still refer their friends and family to your practice.

### *Delivering quality service*

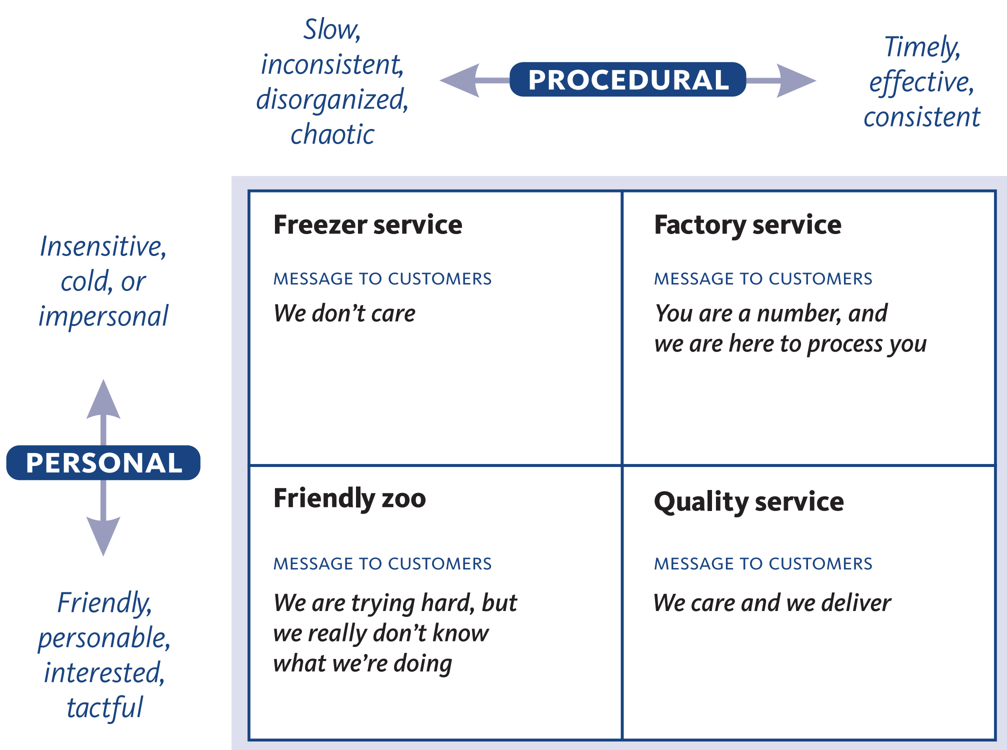
Every patient wants to feel understood, welcome, important, and comfortable. In addition to having these basic needs, prospective patients will feel hopeful and fearful, and will want to be cared for by your practice. As they sell LVC, your staff should remember that their objective is to deliver quality service by putting the patient at ease and doing what it takes to make them happy.

There are two primary dimensions that make up customer service, and each is critical to the delivery of quality service:

- Procedural: the established systems and procedures used to deliver products and services
- Personal: the way staff uses their attitudes, behaviors and verbal skills to interact with patients and prospective patients

To deliver quality service, it is important that the procedural dimension of your practice be timely, efficient, and consistent, and the personal dimension be friendly, personable, interested, and tactful. The message this kind of service sends to patients is 'We care and we are good at what we do.'

## *Dimensions of customer service*



CHAPTER 4

# Training and developing your team

A recent medical marketing survey reported that one-third of all patients who leave a medical practice choose to do so because they are unhappy with a staff member. Prospective LVC patients expect to feel good about how your staff represents laser vision correction, interacts with them by phone and in person, and delivers patient care.

Enable your team to exceed patient expectations by providing in-depth training on all aspects of their jobs and facilitating great communication between staff members to promote teamwork. A well-trained, effective staff is the key to success in your LVC practice.

## Plan for staff training

There are a number of important factors to consider in planning staff training.

### *Commit to ongoing learning*

Effective staff development is driven from the top; the doctor must commit to ongoing learning for every staff member. Of course, saying every team member must be well trained won't mean anything unless training actually occurs. Make the commitment of time and resources for education and training and have it worked into the practice schedule.

### *Create training and performance goals*

Engage staff members in an honest conversation about their areas of learning and growth potential and help them take an active role in setting their training and performance goals. Often, people already know what it is they need to learn, where they need to improve, and what resources they need to accomplish the learning goal. The role of a manager is to listen, coach, and tell team members what the practice expects of them.

Staff members are less likely to be defensive if training is presented as an opportunity to sharpen their professional skills and make their jobs easier and more enjoyable. When done correctly, setting training goals reaffirms a staff member's importance to the practice and to the team.

If you create training and performance goals, these must be reviewed regularly. Review each team member's training plan during their performance review so that as new performance successes and opportunities are identified, the plan can be updated.

***TIP***

Don't forget to schedule refresher training for the most important skills your team uses; surgical, technical, and basic sales skills should be refreshed regularly.

### *Select topics for each staff member's unique educational needs*

What kind of skills does each staff role need to do their job well? Select the skills that will bring the most value to both your practice and the staff member.

For example, sending technicians to refractive courses for ongoing education will sharpen their refractive skills and will emphasize the practice's focus on refractive surgery.

Other staff members may need additional training in word processing, database management, marketing, sales, and customer service skills – any area that they need to develop to help support the practice.

The topics your staff needs training on will change over time as new tools and procedures are added to your practice, so remember to regularly review staff members' goals to determine if they are still relevant.

# *Integrating refractive sales into your practice*

The move to include LVC in a practice involves big changes for your staff that bring new roles and new patients. Take the time to talk, communicate, and lead your staff through the changes.

Explain the plans to include laser vision correction in your practice during a staff meeting. The doctor or practice administrator should speak about the importance of staff training, focusing on specific goals and objectives, and measuring and rewarding results.

Other tips for a successful transition:

- Get your staff involved, and make sure everyone understands the big picture. Plan a meeting with staff members to review your refractive history, analyze your market, and determine an *Action Plan* to achieve future goals. To motivate, offer individual and team rewards for the completion of goals.

- Let your team know if and when there are changes coming that may affect their role and responsibilities.

- Make yourself available for questions, not only in staff meetings but also in one-on-one meetings. Invite your team members to speak with you privately about their concerns.

## Where will your staff get training?

Identify ongoing internal and external education opportunities for the members of your team. Training should be scheduled and frequent – yearly team meetings or professional conventions aren't enough.

People learn in different ways, and training and education should include many opportunities in both formal and informal settings.

### *Internal training seminars*

Many practices hold some form of internal training sessions on-site for their own LVC staff. Depending on the topic, these sessions may be taught by the doctor or the LVC coordinator.

When scheduling an internal training session, manage staff expectations so they understand that the session is a training session and not a staff meeting. Describe what the session is about, and what participants will learn when the session is complete. When possible, limit your training sessions to one hour to make sure you have the team's full attention.

### *External training seminars*

Research the availability of external training sessions, or sessions that are held by organizations other than your practice, such as software providers, training consultants, corporate programs, manufacturer's representatives, and local colleges and universities.

Sales, public speaking, and marketing programs available in the community can be a valuable source of skill development for the LVC team, even if they are not aimed specifically at a medical audience.

When staff members participate in special training sessions that their peers are not able to attend, encourage them to bring back and share handouts and the key points that they learned with their team. This provides a unique development opportunity for the person who is sharing and also helps the rest of the team understand what others are learning.

### *Staff meetings*

Schedule dedicated LVC staff meetings to show laser vision correction's importance within the practice. Each meeting should have a pre-defined agenda and clear obtainable goals. Ask staff to participate in setting the agenda so their concerns and questions can be addressed.

LVC staff meetings held before or after work may be inconvenient for some, so it's a good idea to schedule regular bi-weekly meetings during business hours. Limit meetings to a half hour to one hour to keep frequent meetings from seeming burdensome.

Provide staff with a suggestions form during your meetings, and follow up on suggestions in a visible way. For example, in the next staff meeting, tell your staff about the specific actions that are being taken due to feedback they gave.

**TIP**

Create an agenda that describes the topics you will cover in your training seminars and the order and time in which you will cover them. This will keep your session on track and focused. For an example of a training agenda that can be used to hold an internal training session, refer to the sample Training Agenda in Appendix B.

**TIP**

Visit the web sites of the professional organizations discussed in this chapter:

›› American Society of Cataract and Refractive Surgery/American Society of Ophthalmic Administrators — www.ascrs.org and www.asoa.org

›› American Academy of Ophthalmology — www.aao.org

›› International Society of Refractive Surgery — www.isrs.org

Don't miss an opportunity to share success stories and patient feedback regarding the impact that LVC has had on their lives. It's important to encourage your team's work, recognize their accomplishments, and motivate them. Avoid lecturing during team meetings; instead, generate excitement by including staff in a discussion or brainstorming session.

## Professional societies or organizations

Encourage your staff to participate in professional societies or organizations to further their education and professional network. Many industry organizations have created programs specifically for refractive professionals.

- The ASCRS/ASOA (American Society of Cataract and Refractive Surgery/ American Society of Ophthalmic Administrators) have excellent programs with clinical, technical, and practice development sections focused on refractive surgery
- The AAO (American Academy of Ophthalmology) holds a refractive subspecialty day that has a primarily clinical and technical focus
- The ISRS (International Society of Refractive Surgery) holds meetings which also include sessions for administrative staff that focus on practice development

Contact any of these organizations for more information on training and educational opportunities.

## Other resources for staff

It can be costly and inconvenient to attend offsite training for all of the topics a person needs to learn. Use other information sources such as books, web sites, and business consultants to supplement and extend learning.

- VISX® Business Development Managers, VISX.com, VISX University®, and Fast Track regional courses are valuable sources of information and education for your staff
- Consultants and other resource vendors are also available within the refractive industry to assist the practice
- Professional societies and organizations are great sources of information for your staff; web sites of these organizations and other Internet sites such as www.allaboutvision.com can be useful resources, especially if they are monitored regularly for new developments
- Create a library of reference and educational books that staff members can check out to promote non-formal learning about the wide range of topics you'd like your staff to know about

## Provide incentives for staff development

Incentives are an important key to staff motivation and can help the team stay motivated to learn and perform. Recognition and reward are tried-and-true methods of positive behavior modification for both teams and individuals.

# *VISX University® Seminar*

VISX University Seminar is an educational program that was created specifically to help practices grow their laser vision correction business. The faculty at this interactive seminar and workshop are industry experts, practice managers, and doctors who share their experience in building successful laser centers. Graduates from VISX University have the confidence and ability to incorporate laser vision correction into their practices and succeed in the LVC market.

- The Live Session is typically held in conjunction with major eye meetings and focuses on practical skill development. Interactive courses provide an opportunity to work on phone skills, consultation skills, internal and external marketing, growth strategies, lead tracking, and include industry/technology updates.

  Live Session faculty typically includes a combination of field experts and VISX® Business Development Managers who have many years of experience in working with practices to effectively implement LVC. A benefit of the session is that it brings VISX customers together, enabling them to learn from each other and offering networking opportunities.

- Fast Track courses are held regionally and are hosted by a local VISX Business Development Manager. These courses typically focus on the development of basic skills, and are held in smaller sessions that offer great opportunities for interaction and role-playing.

For more information on VISX University Seminar and other educational programs VISX offers, visit www.visx.com and click on Educational Programs.

**TIP**

Here are some simple ideas for incentives:

>> Movie tickets

>> Gift certificates to spas or restaurants

>> A celebration party when the team reaches its goals for the month or quarter

>> Membership dues to professional organizations or attendance at regional and national meetings

>> Monetary incentives, such as bonus plans

Use incentives to reward:

- Actions that go beyond the call of duty in helping patients or other team members
- Outstanding performance, completion of training, and reaching individual and team goals

## Types of incentives

Incentives can be anything that your staff members will perceive as valuable. Common incentives are often small items, such as gift certificates, awards of achievement, or desk accessories. More valuable awards and gifts are often given for larger accomplishments.

Monetary incentives are particularly effective for motivating staff members. Some practices put a set dollar amount into a team fund every time specified goals are reached, which is distributed to the team with the doctor's thanks.

Formalized incentive programs can be developed that are specifically tied to follow-up on leads, patient satisfaction ratings, conversion rates, and other performance measures. For example, it could be agreed that staff members who deliver exceptional customer service, as assessed by patient satisfaction surveys, will receive a reward at the end of each quarter. Document formal incentive programs and distribute the information to participating staff members to let them know how they will be rewarded and for what.

Incentive programs may seem simple: let staff know what they will be rewarded for, and then reward them for the desired performance. However, if you start an incentive program it's important that you are consistent and fair. If it seems to the staff that you reward good performance sporadically or randomly, it stops being a motivator.

**WORKSHEET**
*Action Plan*

Working with your BDM, develop an integrated strategy for building your LVC team. Review and update your *Action Plan* on a regular basis. (If you did not receive this worksheet with your PDP materials, it is available online at www.visx.com or from your BDM.)

CHAPTER 5

# Evaluating results

## Why is ongoing evaluation important?

Measuring the results of your staff training and development is important for many reasons:

- It's the way you can determine if the budget being spent on training and development of your staff is bringing in business to your practice
- An important part of training and development is setting and evaluating goals to improve performance; having established performance goals that are evaluated helps staff members feel as though they are being reviewed against a known standard, and gives them a sense of accomplishment when they make progress towards their goals
- Evaluating your results helps you to identify what is (and what isn't) working for your practice

## What should you evaluate?

Determine what information to evaluate based on what team development and staff training efforts you've implemented. The answers to the following questions can guide you in determining what efforts to evaluate and measure:

### LVC team development

- Is there a defined LVC team?
- How were team members selected for their roles?
- Are there regular LVC team meetings?

### Staff training

- How are staff members trained?
- Is there a plan in place with LVC team goals and objectives?
- Does each staff member have training goals? Are these goals reviewed regularly?
- How is team and individual progress assessed, and by whom?

## How to evaluate the impact of your efforts

In order to measure the impact of training and development efforts, you will need to create a method to track results.

You may consider tracking the following performance indicators:

- Patient satisfaction rate
- Phone conversion rate
- Consultation conversion rate
- Team member performance appraisals by manager and peers
- Quarter-over-quarter and year-over-year volume results

It's a good idea to take the extra time necessary to track performance indicators by team member as well as for the entire team. Tracking individual performance will give you and the team member being evaluated a better overall picture of how your team performs and where weaknesses and strengths lie.

### Goal boards

Try keeping team goals posted on a goal board, a tool used to measure your LVC team's progress against its goals. Your goal board can show team goals for patient numbers versus the practice's actual patient numbers for inquiries, seminars, consultations, and procedures. You can also compare actual versus goal conversion rates on the board. A sample LVC Goal Board is shown in Appendix B. (Note that conversion rates are not shown on the sample, but you can add them to suit your own needs.)

Post the goal board in a prominent staff area, such as a break room, to remind the team of its progress.

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**WORKSHEET**

*Evaluating Your Success*

The *Evaluating Your Success* worksheet provides an organized way to evaluate your practice's progress in relation to your *Action Plan*. If you feel you need a more detailed evaluation, your BDM can help you develop a process for ongoing evaluation of your practice. Be sure to share and discuss the results of your evaluation with your BDM. (If you did not receive this worksheet with your PDP materials, it is available online at www.visx.com or from your BDM.)

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## *Using your Action Plan*

Another way to determine the impact of your staff training and development efforts is to use your *Action Plan* as an evaluation tool. You'll probably want to review it regularly, at least quarterly, with your BDM. Review and revise tactics that have not been implemented; revisit next steps to meet your goals. Continually updating your *Action Plan* is a great way to fully support your efforts.

## Appendix A: Resources

Berry, Leonard L. *Discovering the Soul of Service*, Free Press, 1999.

Blanchard, Ken, Bill Hybels and Phil Hodges. *Leadership by the Book.* William Morrow and Company, Inc., 1999.

Blanchard, Ken, Donald Carew and Eunice Parisi-Carew. *The One Minute Manager Builds High Performing Teams.* William Morrow and Company, Inc., 2000.

Blanchard, Ken, Patricia Zigarmi, and Drea Zigarmi. *Leadership and the One Minute Manager.* William Morrow and Company, Inc., 1985.

Blanchard, Ken and Sheldon Bowles, *Raving Fans.* William Morrow and Company, Inc., 1993.

Buckingham, Marcus and Donald O. Clifton. *Now, Discover Your Strengths*. Free Press, 2001.

Collins, Jim. *Good to Great.* Harper Business, 2001.

Connellan, Tom. *Inside the Magic Kingdom, Seven Keys to Disney's Success.* Bard Press, 1997.

Covey, Stephen R. *Living the 7 Habits, Stories of Courage and Inspiration*. Simon and Schuster, 1999.

Covey, Stephen R. *Principle-Centered Leadership*. Simon and Schuster, 1991.

Gladwell, Malcolm. *The Tipping Point.* Little, Brown and Company, 2002.

Johnson, Spencer. *Who Moved My Cheese?* G.P. Putnam's Sons, 1998.

Pacetta, Frank. *Don't Fire Them, Fire Them Up*. Simon & Schuster, 1994.

Pritchett, Price. *The Employee Handbook of New Work Habits for a Radically Changing World.* EPS Solutions, 1999.

Spector, Robert and Patrick D. McCarthy. *The Nordstrom Way.* John Wiley & Sons, Inc., 1995.

## Appendix B: Samples

# SAMPLE Training Agenda

Practice name: ______________________________________________

Location: __________________________

Date: ____________________ Time: _______________

Facilitator: ______________________________ Type of meeting: _____________

The presentation will focus on excimer laser-related procedures and patient education. Excimer laser ophthalmic technology, VISX, Incorporated protocols/information, and current FDA status will be reviewed. Specific attention will be given to correctly answering patient inquiries.

**Attendees:** Selected staff (primarily patient services). All interested are welcome.

**Preparation:** Please read and bring the handouts you were given earlier [insert titles of advance materials], and copies of current patient education materials. It may be helpful for you to write your questions down ahead of time and bring them to the training.

**Agenda:**

| | |
|---|---|
| 12:00–12:15 PM | Meeting overview: excimer laser technology<br>History and development<br>What can be corrected?<br>New technology, FDA status |
| 12:15–12:45 PM | Excimer laser procedures: PRK, LASIK<br>Patient selection 'Who is a candidate?'<br>Procedure 'How it works'<br>Results: risks/benefits |
| 12:45–1:00 PM | Patient education techniques<br>Telephone inquiries vs. clinical inquiries<br>Marketing aspects (printed material, seminars, screenings)<br>Informed consent |
| 1:00–1:15 PM | Questions<br>Most frequently asked questions (from your experience)<br>Questions you would ask if you were a candidate |

## SAMPLE Goal Board

| LVC goals Q1 | Inquiries | | Seminar attendees | | Consultations | | Procedures | |
|---|---|---|---|---|---|---|---|---|
| | Goal | Actual | Goal | Actual | Goal | Actual | Goal | Actual |
| January | | | | | | | | |
| February | | | | | | | | |
| March | | | | | | | | |
| Totals | | | | | | | | |

This sample goal board shows a practice's LVC goals for the first quarter, by month. You can also create a goal board that shows goals by quarter, by week, or in a bimonthly view.

The goal board sample shows the team's goals for the following patient interactions:

- Inquiries
- Seminar attendees
- Consultations
- Procedures

Your own goal board may track a different combination of patient interactions, such as different procedures and services or word-of-mouth referrals.

In addition to tracking the *goal* the practice has set for each type of prospective patient or patient interaction, the *actual* number of prospective patient or patient interactions that occurred during each period of time is tracked for comparison.

Create your own goal board with your team's goals, and update it frequently. Post your goal board in a prominent staff location, such as a break room, to help remind the team of its progress.

## NOTES

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