Job descriptions, roles, and responsibilities

2

STAFF TRAINING & DEVELOPMENT

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.

Job descriptions, roles, and responsibilities

Introduction to the module

Overview and goals

Job descriptions, roles, and responsibilities is the second module in the *Staff training and development* core competency and covers:

- Which staff functions and roles are important for an LVC team
- Why job descriptions are important to staff training and development
- How to write a job description
- How to write a job posting

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

- Describe typical staffing for an LVC practice
- Define the role and responsibilities typically performed by the LVC coordinator
- Develop written job descriptions for key staff involved in delivering laser vision correction services
- Document practice workflows describing how team roles work together to perform LVC tasks
- Create an *Action Plan* for staffing that includes writing job descriptions for key LVC staff members
- Measure the impact of your staff planning efforts through a variety of evaluation methods

To support these goals, you will also learn:

- Typical staff roles for an LVC team
- Why you need an LVC coordinator
- Why you should document workflow processes for your team
- Elements of a job description and why each is important

Key concepts

- The staffing for your LVC practice will depend on your practice's situation
- An LVC team should be able to handle both patient care responsibilities and sales duties
- Each position on your LVC team should have a written job description
- Select people with the right skills and aptitude for the positions needed on your team
- The LVC coordinator is responsible for examining the LVC practice and its growth from both a strategic and tactical level
- Sharing documented workflow processes with your team enables staff members to be aware of the entire patient management process and their role in it
- A job description is a written document describing the responsibilities and duties of a role and lists the skills and knowledge a person will need to perform that role
- Ongoing evaluation tracks the progress of your training and development efforts and gives you the information necessary to make improvements

Materials

- Sharing Your Role
- Practice Assessment
- Writing a Job Description
- Writing a Job Posting
- Action Plan
- Evaluating Your Success

Table of contents

CHAPTER 1

LVC roles and responsibilities

This module focuses on defining job descriptions, roles, and responsibilities for your LVC team. The first step in determining roles and responsibilities for your LVC team is to understand how an LVC team is organized. In this chapter, we'll focus on what an LVC team is and what the typical LVC team organization and roles look like.

What is an 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.

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.

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

Team roles and responsibilities

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.

First, we'll focus on the LVC coordinator role, because it is unique to LVC practices and may be less familiar than other team roles. Then we will discuss other critical LVC team roles and responsibilities.

Keep in mind that LVC team members and titles will vary depending on your practice and the individuals on your staff, but the *roles* described in this chapter are vital to the success of your LVC practice, even if you don't have a dedicated employee performing each function separately.

LVC coordinator

The LVC coordinator is a key role that is unique to the LVC team. It is one of the most challenging yet fascinating jobs on the team because of the importance and broad scope of the role. If you create only one new role for your LVC team, that role should be the LVC coordinator.

Typically, the LVC coordinator is the person responsible for examining the LVC practice and its growth from both strategic and tactical levels, steering the team's overall progress, and helping find and clear obstacles to success.

This person could be considered the 'quarterback' of the LVC team, determining the best ways for the team to work together, continually improving processes, and ensuring the delivery of quality service and customer care. The LVC coordinator is also responsible for communicating the message of the practice to the community through LVC marketing programs and public outreach.

Why do you need an LVC coordinator?

With an LVC coordinator on your team, you have a person dedicated to looking out for the interests of the LVC practice. The LVC coordinator is the 'go-to' person who will respond to customer needs and issues promptly. They understand the LVC patient and the brand that the practice represents, and strive to maintain that image in the eyes of the customer. The LVC coordinator is also the team's 'cheerleader,' reinforcing the need for everyone on the team to participate in the program. They focus on the training needs of the team and make sure that the team can match patient needs and wants to practice services and support. They look for ways to encourage and motivate the team to reach its goals.

In short, it is the LVC coordinator's job to ensure that the LVC practice succeeds.

Defining the LVC coordinator role

The LVC coordinator must be versatile, with the ability to play a number of roles including planner, patient ambassador, team motivator, teacher, and facilitator.

A person who would be a good LVC coordinator:

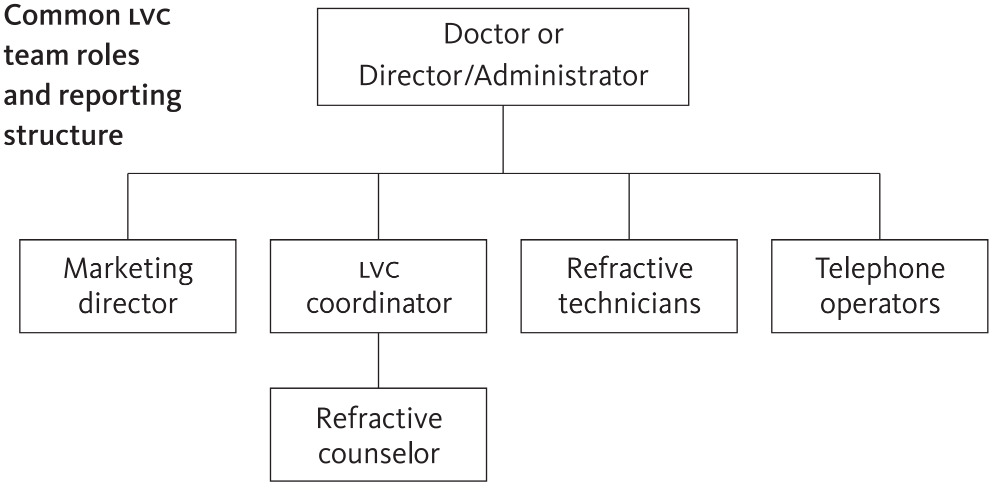
- Is enthusiastic and sincere, and loves working with others and building relationships
- Understands the practice's philosophy and goals and has experience working in a practice environment
- Empathizes with and advocates for patients
- Believes in the procedure and enjoys communicating about LVC
- Is energized, self-motivated, and resilient
- Has a sales or marketing background
- Is a great communicator

Invest an appropriate amount of time in selecting your LVC coordinator to make sure you choose someone who is right for your practice—an LVC coordinator, good or bad, will make a significant impact on your team.

Doctor

The key role of the doctor includes performing medical examinations, screenings, and procedures. It is their

Common LVC team roles and reporting structure



responsibility to effectively communicate whether or not a prospective patient is a candidate for LVC. They may also be responsible for presenting seminars to prospective patients and other health care professionals.

A doctor might serve as the director/administrator in addition to their other duties.

Director/Administrator

The director or administrator is the practice manager, and in some practices may be the doctor. This person is responsible for ensuring that the practice has the resources (staff, equipment, space, and budget) to reach its goals. The director manages the team on a daily basis, ensuring proper implementation of team roles and responsibilities.

Marketing director

This role plans, coordinates, and develops LVC marketing programs, including placing advertising, monitoring marketing efforts, and organizing seminars and other programs. A key focus of the marketing director is on building the practice's brand via internal and external marketing programs.

In smaller practices, these responsibilities may belong to the LVC coordinator or director/administrator until revenue justifies hiring a dedicated marketing professional. Some practices hire a consultant or outside service provider to coordinate these efforts.

Refractive technician

The refractive technician performs screening evaluations and schedules preoperative appointments and surgery dates. They also answer technical questions and work with the doctor to determine a prospective patient's candidacy for LVC.

Telephone operator

The telephone operator is the first point of contact for most prospective patients. They need to be comfortable answering basic questions and assisting the caller with determining the most appropriate next step. These team members receive call inquiries, schedule contact by phone, and perform database entry tasks. Telephone operators may also have some outbound follow-up duties depending on the practice.

Refractive counselor/Patient counselor

Refractive counselors assist the patient throughout the LVC process. They update the LVC patient database, discuss financing options with patients, and meet with the prospective patient after the medical evaluation to determine the next step for that patient. The LVC coordinator may also perform this role.

Refractive representatives

All practice staff members should be considered refractive representatives. The entire team should be able to answer basic questions and direct interested prospects to the LVC team.

How do your team roles fit together?

In order to do their job well, team members need to know how and when to interact with each other. Defining how your team roles work together is critical to the smooth functioning of your team. One of the best ways to educate team members about how team roles work together is to create and document distinct and specific workflow processes for your practice.

TIP

Workflow guidelines help your staff to avoid duplication in their efforts and minimize shortcomings.

Workflow analysis

The word *workflow* refers to the process, or sequence of tasks, that describes how something gets done. Your practice has many distinct workflows. For example, you have a certain process for scheduling patients, one for consulting with prospective patients, one for managing LVC inquiries, etc. In fact, everything your practice does can be broken down into distinct processes.

The process of defining workflows for your team is:

- Identify key processes for your practice
- Describe the component steps of each process
- Document your workflows

Identify key processes in your practice

Although every aspect of an LVC practice can be broken down into distinct processes, most practices start by focusing on a few key processes. As you and your team realize the value of workflow analysis – increased efficiency and improved team dynamics – you can identify and document additional workflows. Some of the processes you might want to start with include:

- Initial inquiries – what happens when prospective patients first contact your practice?
- Consultations – what happens when a patient comes in for a consultation?
- Follow-up to inquiries – what do you do to follow up with prospective patients?

Other processes that you might want to define include:

- Seminar planning
- Marketing materials review

- Maintenance of patient support materials
- Budgeting
- Tracking and scheduling of continuing education for doctors and technicians
- Lead tracking management and reporting

Define the process steps

Each step of a process can be described simply as *who* does *what*, *when*, and by *what standard*. Together, these four aspects of a step tell you all you need to know about the work that needs to be done. (See the sidebar below for an example).

Document your workflows

Workflows can be documented as flowcharts, as tables, or simply as descriptive paragraphs. (Examples of each method are shown on page 6.) When deciding how to document your workflows, the most important thing is to arrange the elements and steps of your process in a way that will be most easily understood by your team.

Flowcharts describe a process visually by arranging steps in boxes and drawing connections between the steps. A visual presentation makes it easy to understand at a glance the various steps of a workflow, their order, and how they are related to each other. Many people learn best from a visual presentation. However, for complex workflows, flowcharts can sometimes become large and unwieldy.

Tables can be used to describe a workflow in a consistent and highly structured way. For instance, a table might have columns that list 'who', 'what', 'when,' and 'by

TIP

Rely on the knowledge and expertise of your team when documenting your practice workflows. In many cases, team members will have unique insight into how a given task can best be accomplished.

What is a workflow and how do I define one?

A workflow describes the series of steps it takes to accomplish a given task.

Each step of a workflow can be simply described by *who* does *what*, *when*, and by *what standard*.

Note that the order of the terms is not important — you can use whatever order makes the most sense to you.

This term	Describes
Who	Team member responsible
What	Responsibility, task, or duty
When	Timing, or which part of the process
Standard	Quality expected

Here's an example of one step in the patient arrival workflow:

When	Immediately upon arrival
Who	Jennifer
What	Welcomes visitors at the reception desk
Standard	By smiling and warmly greeting visitors with our typical practice greeting

Different ways to map your workflows

The following are examples of different ways to document workflow processes. We've used the same workflow, a Patient Arrival Process, to demonstrate how the different formats can capture different information.

Flowchart

Greet the patient warmly, by name	→	Make the patient comfortable, orient them	→	Briefly explain the constultation process	→	Ask for any questions	→	Ask the patient to complete the intake form
JENNIFER		JENNIFER		ROBERT		ROBERT		ROBERT

Table

Process begins: Patient arrives		
Step	**Task description**	**Team member**
1	Greet the patient warmly, by name	Jennifer
2	Make the patient comfortable by orienting them to the practice environment: restrooms, refreshments, exam rooms.	Jennifer
3	Briefly explain what to expect from the consultation process: length, steps, and purpose of each step.	Robert
4	Ask for any questions the patient may have, explaining that many in-depth questions will be answered during the consultation	Robert
5	Ask the patient to complete the intake form	Robert

Descriptive paragraph

At the front desk, Jennifer greets the patient warmly by name, introduces herself and says *I'm so glad to meet you*. She orients the patient to the office, showing them the location of restrooms, refreshments, and exam rooms. She asks the patient to have a seat in the reception area and make themselves comfortable. Robert introduces himself to the waiting patient and explains the consultation process, providing a brief overview of what will happen during the consultation, such as how long the consultation will take, what the steps are, and why each step is important. He asks the patient if he can answer any of their questions, and then asks them to complete the intake form and return it to person at the front desk. Finally, Robert thanks the patient for coming in for a consultation and assures them that the doctor will be with them shortly.

what standard', and rows that document each step. This presentation can be useful when documenting simple, strictly linear workflows, or when initially identifying the various steps of a process. Tables tend not to be well-suited for LVC training purposes since the tabular structure often makes a process appear more complicated than it is, and because tables cannot represent non-linear workflows (e.g., if one step is followed by two steps, handled by different people, that occur at the same time).

Descriptive paragraphs document a workflow in a straightforward way by simply telling the story of the process, usually with each step in a separate paragraph. This written approach is easy to understand, both when documenting a workflow and when educating your staff. One major disadvantage is that it is not possible to get information at a glance—either about the overall flow or about a single step.

Educate your team

There are several ways to make good use of your newly defined workflows. You can keep a binder of your practice workflows for reference. Review them quarterly at staff meetings to make sure they are current and to come up with improvements.

Another idea is to post workflows in your practice, perhaps on a bulletin board in the staff room, so that everyone can see how their role fits into the overall scheme of the practice and can learn something about other team roles. Encourage your staff to make suggestions about how a workflow might be improved, or how a shortcoming can be addressed.

A third option is to have team members take turns giving a presentation about their role and what they do. This can be included in regularly scheduled staff meetings, or in special weekly or monthly sessions. (See the exercise *Sharing Your Role*, below).

EXERCISE

Sharing Your Role

Take time to complete the *Sharing Your Role* exercise as a group with your team. This exercise will help your team members to share their roles and responsibilities with the rest of the team and will encourage teamwork on your staff. Be sure to share and discuss the results of the exercise 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 a *Practice Assessment*, take time now to at least complete the Staffing and Staff skills sections of the assessment. 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.)

TIP

If you have an existing LVC team, the *Sharing Your Role* exercise is a great way to start documenting your team's existing LVC workflows.

CHAPTER 2

Developing job descriptions

What is a job description?

A job description is a written document that describes the responsibilities and duties of a certain role within your practice and lists the skills and knowledge a person will need to perform that role.

Job descriptions generally include:

- A clear and proper identification of the role
- An explanation of job responsibilities and why the job exists
- Duties, or details of the main responsibilities
- Areas of the practice the job impacts
- Qualifications of the job – necessary skills, education, and experience, including specific training or certification requirements

Job descriptions support a practice's success in several ways. First, they provide information on the value of a job to the practice and to the team. They also serve as an excellent communication tool between managers and team members by establishing a clear reference point for evaluation. Most importantly, job descriptions help each team member understand their role and responsibilities so that they can perform in the way that your practice needs.

How to write a job description

Writing a good job description can mean the difference between having the right person on your team and having the wrong person on your team.

Job descriptions should define the major responsibilities and aspects of the job. When writing the description, keep in mind that it may serve as the basis for recruitment and conducting staff evaluations, so be as clear, concise, and accurate as possible.

Craft your job descriptions so that they reflect your long-term business plan, and work to ensure that any positions you create fit into the framework of your LVC practice. Think through the aspects of the job and have a clear picture of what it is you're looking for. If you don't craft a thoughtful definition of the responsibilities and qualifications for each position, you are not likely to find the right person for the role.

STEP 1. Choose a job title

Choosing a job title is the first step in writing a good job description. The title will be the thing that tells team members, patients, and candidates just what the role is, so consider using a job title that is common in the industry.

Sample job description

Here's an example of how the various descriptors of a role can be put together to form a job description:

Job title and role this position reports to

Title: Laser Vision Coordinator
Supervisor's title: Administrator

Job summary

Brief summary of the role's duties

Definition of work and hours

This individual serves as the coordinator for patient and community information regarding LVC. Responsibilities include maintaining referral records and corresponding communication, managing an inquiry database, and coordinating the distribution of information. This is a full-time position with required weekend and evening hours. Most work is performed in the office; however, local travel may be necessary.

Job requirements

Minimum requirements

Desired experience

Education and experience

- High school graduate with additional formal study
- Minimum 5 years work experience; retail customer service experience ideal

Essential skills and abilities

- Excellent communication skills: superior writing ability and interpersonal skills, including telephone technique, are essential
- Computer literate
- Ability to master basic medical and ophthalmic terminology
- Ability to prioritize and organize; competent in problem-solving and decision-making
- Sales-oriented team player

Responsibilities and duties

Job responsibility with % indicating total time to be spent on these duties

Detailed duties for each responsibility

Laser vision correction inquiries (30%)

- Mail information packets with letter and requested information
- Handle all questions and call-back and follow-up responsibilities
- Coordinate scheduling of surgery patients

Database management of prospective LVC patients (20%)

- Channel candidates to next action step; update records and track activities in database
- Mail merges from database to prospective candidates to follow established contact timeline

Staff training (10%)

- Train staff on direct call processing activities
- Schedule updates, staff seminars, and LVC education

Co-management and special projects (40%)

- Coordinate all co-management activities
- Manage the VIP and other referral programs
- Provide patient consultations and assist with patients on procedure day
- Assist the administrator with advertising project management

Keep the job title to the point and accurate in its description of the key role of the position.

STEP 2. *Define the position*

What are the needs of the team that this position will fill? Use these needs to focus on defining the position. Determine who this role reports to and exactly where the role fits into the LVC team. If applicable, describe the budget this position administers or any roles this position supervises.

Don't forget to include what environment the candidate will be working in. This may include the type of equipment or software programs they will be using as well as who they will be working with. You should also state the hours and the days they will be expected to work.

Identify whether the job is full- or part-time, permanent or temporary. Decide on the salary level you will offer, and whether it is negotiable. It's not necessary to offer salary information within the written job description.

STEP 3. *List job responsibilities and duties*

What are the responsibilities and duties involved in the job role? What will the person in the job do on a daily basis? What is this role expected to accomplish? Be specific and list the everyday duties and overall responsibilities for the role.

Responsibilities

A responsibility is an overall area of work that the position is responsible for—for instance, LVC candidate database management, or staff supervision.

Be specific in listing four to eight overall responsibilities for the role, and include the approximate percentage of time that the person in the role will spend on each responsibility.

Duties

Duties are the specific actions taken when performing a responsibility. These should be actions that someone can see, hear, or observe. Duties should begin with an action verb describing the activity.

EXAMPLES

- *Update* patient database records
- *Interview* candidates

For each area of responsibility, list the required duties, noting the frequency of each (daily, weekly, monthly). Write no more than six to eight duties per responsibility, and keep them as simple as possible.

EXAMPLE

For the inquiry management responsibility of the LVC coordinator position, duties might include:

- Mail information packets with letter and requested information
- Handle all phone inquiry questions and follow-ups
- Discuss procedures with candidates at all screenings and consultations
- Enter follow-up information on screening and surgery into patient record
- Coordinate surgery patients with business office, clinic, referring doctor's office, and laser center

TIP

Other action verbs you may wish to use to describe job duties include: performs, drives , coaches, monitors, plans, inputs, supervises, recommends, analyzes, answers, changes, trains, verifies, sells, organizes, files, and examines.

STEP 4. Determine the job requirements

Job requirements describe the required education, experience, skills, and abilities that a staff member must have to perform the responsibilities and duties of a job. In other words, someone who does not have the requirements for a job could not be expected to perform well.

It is important to be realistic when you set requirements for your staff positions. For example, if only a high school education is required to do the job, make this the requirement. If a college degree is something that you would like the employee to have, but it is not strictly necessary, add this as a desirable, but not required, trait.

Example

High school diploma or GED required. College degree in health education desired.

Example

Ability to manage multiple projects required. One year of project management experience desired.

Education and experience

Add to your list the level of education and experience you are seeking in the ideal candidate. Specify any college degree, credential, or professional certification needed for the role.

Will experience in a certain field enhance the ability of a candidate to do the job, or is experience irrelevant to this role? If experience is necessary, indicate what kind and how much this team member should have.

Example

Graduate degree in marketing or business administration.

Essential skills

Make a simple, accurate list of the skills that are important and necessary to perform the job. A skill is something a person is able to do that helps them accomplish the duties of their job.

Example

- Public speaking
- Word processing
- Effective communication, including listening and speaking
- Negotiating, such as compromising and persuading

Other requirements

The personality of the ideal person for the position is as important as the needed skills and experience. You need someone who fits in well with your practice and shares your team's philosophy and attitude.

List the kind of personality and attitude you are looking for in a team member.

Example

Our LVC team seeks a positive, motivated individual who loves working with people.

STEP 5. Write the job summary

The job summary provides a brief job overview that summarizes the main points of the job description. Write concise statements reflecting the general nature, purpose, and objective of both the job and the practice. Try to keep the summary to a paragraph.

Example

The LVC coordinator serves as the coordinator for internal patient and external community information, providing information to prospective candidates regarding available refractive services and procedures. Responsibilities include maintaining referral records and communications, coordinating educational seminars, managing the inquiry database, and supervising information distribution with an emphasis on permission marketing.

STEP 6. Review and revise the job description

Have someone else read your finished job description. If you are writing a job description for a position that already exists, have the person in that role review the job description and offer input.

There are many times when it is appropriate to revise a job description, especially for newly created roles that may change in unexpected ways. For example, revise the description when:

- The needs of the practice change and the position must take on more or fewer responsibilities
- The applicants who fit the job description are not of the quality you had hoped for

WORKSHEET

Writing a Job Description

Take time to complete the worksheet for writing a job description for a position in your LVC practice. 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.)

Advertising for an open position

Creating a job posting, or advertisement, for a position is mostly a matter of scaling back a well-written job description to a few main points.

The amount of space you have to write about the position will vary depending on where you place the advertisement, but generally, job postings should be as concise as possible. Be specific about your needs – if you are too vague, the right people won't apply.

The posting should tell the reader about your practice and should make the position sound like an attractive offer. Remember that you are selling the job to potential applicants, so try to inspire and excite when describing the opportunity.

Once you have finished a draft of the job posting, have someone else – a staff member or a colleague – review it to double-check that you provide enough information about your practice, the work environment, and the actual position to make it sound appealing.

If you'd like applicants to view the entire job description before applying, try putting the job description on your web site and offering the Internet address in the job posting. You might also consider asking applicants to call your office to have a complete job description sent to them.

Remember to include information on how to contact your practice and apply for the position in your job posting.

Here's an example of an advertisement for an LVC coordinator:

If you are a people person looking for an exciting opportunity to complement your clinical expertise, look no further. Laser Vision Correction offers you an exciting new challenge! Our practice is looking for the right person to join our team as an lvc coordinator. This educational marketing position offers diversity in settings both in and out of the office. It requires a professional demeanor with good organization and motivational skills. Basic computer skills are a plus, as are advertising and sales experience.

We offer competitive benefits and a supportive work environment in the beautiful downtown area. Visit our web site at www.ourlvcpractice.com to view the complete lvc coordinator job description and find out how to apply, or call us at (555) 555-5555 for more information.

WORKSHEET

Writing a Job Posting

Take time to complete the worksheet for writing a job posting describing a position in your LVC practice. 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.)

CHAPTER 3

Putting it all together

Now that you have a good understanding of the tasks involved in defining your LVC team and in creating job descriptions for LVC team roles and responsibilities, you can create a plan to apply what you've learned within your own practice.

If you have questions about the material covered in this module, your BDM can provide you with additional resources and guidance. Please don't hesitate to call on your BDM for assistance.

WORKSHEET

Action Plan

Working with your BDM, craft an integrated strategy for developing job descriptions, roles, and responsibilities for your LVC practice. 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 4

Evaluate your results

Why is ongoing evaluation important?

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

- It's the way you can determine if the staff development strategies and tactics you implement actually bring new business to your practice
- Evaluating staff against established goals gives staff members a sense of accomplishment when they make progress towards the goals
- Evaluating your results helps you to revise your staffing plan based on what is (and what isn't) working for your practice

What should you evaluate?

There are many ways to evaluate the results of your staff planning. Consider tracking and measuring the following performance indicators:

- Patient satisfaction rate
- Phone conversion rate
- Consultation conversion rate
- Team member performance appraisals by self, manager, and peers
- LVC goal achievement

How to evaluate the impact of your efforts

As staffing changes are made to your team, compare the new team's performance against the old team's performance to determine the impact of the change. Take into consideration that after a change, performance may not increase right away. Give your new team enough time to work together before expecting performance improvement after a change.

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 person being evaluated a better overall picture of how your team performs and where weaknesses and strengths lie.

Remember to involve your team and individual staff members in the evaluation of their performance. Letting your team members know that they will be evaluated and what they will be evaluated on will make receiving feedback on their performance more meaningful and relevant to them.

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.)

Using your Action Plan

Another way to determine the progress and success of your staff planning 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

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2

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