How Many of Us Work in an Environment with this Approach to Decision Making???

Building a Road Map to Success

STEP #1: BEGIN WITH YOUR FOUNDATIONS
Mission

What is the guiding idea, concept, or purpose that drives every decision you make/action you take?

Horizon Eye Specialists & LASIK Center is dedicated to providing our patients, our colleagues, and the Phoenix community excellence in care with every interaction.

Mission

Envision Management & Marketing LLC is committed to leading clients’ success by enhancing the strategic vision, operational effectiveness, and marketing superiority of their businesses.

Vision

What do we see as our ultimate destination as an organization?

Vision

The #1 Refractive Surgery Customer Relationship and Marketing Management solution.

Vision

Horizon Eye Specialists & LASIK Center Provides Eye Care Like No Other.
Values
What values do our doctors and staff share and plan on relying on in reaching this Vision destination?

Values
If money didn’t matter, if acclaim was irrelevant, if competition was non-existent, how would your organization be described?

Values
Provides guidance as to the character we plan to utilize as we achieve now and in the future

Clinical Excellence
To be the best in medicine, HESLC doctors and employees are committed to Clinical Excellence, which is providing our patients the highest quality of care during each visit to our practice.

Innovative Care / Cutting Edge Technology
Premier practices like HESLC provide their patients Innovative Care. We strive to utilize cutting edge and proven techniques of care customized to each patient.

Values
Fabled Service
Exceeding the demands of our patients and colleagues through Fabled Service is expected from each HESLC employee. This means anticipating a patient’s needs before they even know their needs.

Efficiency
In order to help our patients keep up with their busy lifestyles, HESLC must run like clockwork with daily Efficiency in clinic flow, reception interactions, optical service, business transactions, and financial soundness.

Values
Teamwork
The cornerstone of reaching the above mission, vision, and values is Teamwork. We are a practice which will succeed best when working together focused on our common goals.
VALUES QUESTIONNAIRE

1. What is/are the doctor(s)/partners' most dominant personality trait/s?

2. What is/are the doctor(s)/partners' primary motivators (money, acclaim, skill, etc.)

3. Outside of work, what are the pursuits/goals of the doctor(s)?

4. What about my goals/career ambitions agree with or vary from those of the doctor(s)/owner(s)'

5. Compared to other well-known quality employers, how committed are we to personnel development & growth?

6. What level of intensity will it require to meet our vision, and am I physically/mentally up to the task?

STEP #2: SET THIS YEAR’S STRATEGIC GOALS

1 to 5 Overarching Goals

Be As Specific in Your Targets As You Can

Doctors’ Personalities will impact how specific you are able to get

DO YOUR HOMEWORK

- Obtain data on the macro (overall) economic conditions now and most likely in six months
- Obtain data on the micro (local market) economic conditions now and most likely in six months
- Be current on industry trends (technology, devices, revenue sources, ad & marketing, etc.)
- Know your competitive advantage in the market
Examples of Strategic Goals

Growth Targets (revenue, surgeries, or visits)

New Doctors (Specialties)

Examples of Strategic Goals

New Service Line

Examples of Strategic Goals

Key Process Changes to Implement ICD-10 - example from 2015

Examples of Strategic Goals

Key Staff Development or Culture Initiatives

Examples of Strategic Goals

New Office Location
Examples of Strategic Goals

New Key Equipment or Technology Start Up

Examples of Strategic Goals

Surgery Center Development or Expansion

Examples of Strategic Goals

Major IT Project

Examples of Strategic Goals

Target for Patient Satisfaction Scores

STEP #3: ESTABLISH ACTION ITEMS FOR EACH GOAL
STEP #3: ESTABLISH ACTION ITEMS FOR EACH GOAL

Could be as few as a couple or as many as 16 to 20 action items.

Depending on size and scope of your practice.

COMPONENTS OF EACH ACTION ITEM

- **Action Statement**
  - Try to lead with an action verb.

- **Description**
  - One to two sentences.

- **Outcomes Measurement**
  - As specific as possible.

COMPONENTS OF EACH ACTION ITEM

- **Responsible**
  - Don’t complete without saying who is shepherding this work.

- **Due Date**
  - Don’t complete without setting a target date.
  - Remember you have 12 months to get it all done.

EXAMPLES OF ACTION ITEMS

- Patient flow or process changes.
- New Marketing Campaign.
- New Staff Development Program.
- New equipment start up.
- New satellite start up.
- Change in doctors, office hours or coverage.
- New service.
- Expense control efforts.
- Patient event(s).
- New patient education effort.
- Networking event(s).
- Staff.
- Research study.

**Examples of Action Items**

**2009:** Goal #1: HESLC Will Grow 20%

Continue to increase doctor accessibility at SCF and PSC Office to decrease schedules to within two weeks or less.

In the second half of 2008, we expanded all our doctors’ schedules at our SCF and PSC offices to draw down our appointment availability time. We will continue to adjust schedules to get doctor accessibility within two weeks by the end of Spring.

**Outcomes Measurement:** PSC and SCF schedules with two weeks for all doctors.

**Responsible:** Mike Trier, Dr. Lambert and Barb

**Due Date:** Spring 2009.
Examples of Action Items

**2012 Goal #2: Build Ease: HESLC Will Simplify Our Processes**
Assess Our Patient Reminder Program

We will study our current system for patient reminders and the services we use, along with all potential services that could be provided by the company who provides this for our practice. We want to find a company which can add email and text reminders of upcoming appointments along with phone calls.

**Outcomes Measurement:** This review is completed with plan set to expand our reminder system

**Due Date:** 3rd Quarter 2012

---

**2011: Goal #1: HESLC Will Grow 20%**

Move Peoria Office to New Location

HESLC’s Peoria office will be moved to a more visible location. We are finalizing these plans. Our interior plans are set. Sharona Optical displays are built and ready.

**Outcomes Measurement:** New Peoria office open

**Responsible:** Joey and Mike Trier

**Due Date:** 1st Quarter 2011

---

**2009: Goal #1: HESLC Will Grow 20%**

Recruit Glaucoma Specialist to Replace Dr. Pat Aiello

Dr. A is leaving the practice. We will be recruiting a glaucoma specialist to replace Dr. A and build this specialty in the practice.

**Outcomes Measurement:** Glaucoma specialist begins practice

**Responsible:** Mike Trier, Dr. McCulloch, and Dr. Feller

**Due Date:** August 2009

---

**2010: Goal #4: We Will Continue Automating Our Clinical and Business Processes**

Add Cirrus OCT at Allied Way

A new Cirrus OCT has been ordered for Allied Way. We will then be shifting our current OCT to the Peoria office.

**Outcomes Measurement:** New Cirrus OCT installed at Allied Way

**Due Date:** March 2010

---

**2014: Proactively Keep Allied Way Office First Class in Appearance**

In March, we are six years into our use of the Allied Way office. We will look to have a thorough walk through of the office. From that walk through we will establish a check list of improvements and fixes needed to keep the office up to date and looking exceptional.

**Outcomes Measurement:** Plan completed and in place

**Responsible:** Joey and Mike Trier with input from Dr. McCulloch

**Due Date:** 1st Quarter 2014 and implemented on time throughout

**Update:** Remodel of Allied Way Office in Fall 2014
Examples of Action Items

2012: Goal #2: Build Ease: HESLC Will Simplify Our Processes moving On New EMR Module

Now that we are active on the new EMR system, we will still work to make any necessary changes to the EMR pages to gain efficiencies from the new system. During the 3rd quarter of 2011 and likely first quarter of 2012, Dr. Jeff Girardin will continue to provide Management Plus and Catalyst change requests routinely.

Outcomes Measurement: New EMR pages are improved over the next six months.

Examples of Action Items

2010: Goal #1: HESLC Will Grow. We Have Set Targets of a Revenue Growth of 15% in 2010

Set Target Benchmarks for Lasik Lead Tracking Results and Track Results

In the last two months of 2009, Kurt Wankier worked with HESLC staff to set up a lead tracking program for HESLC.

Outcomes Measurement: Target benchmarks set and HESLC performing at target level by end of 2010

Responsible: Mike Trier with Kurt Wankier on setting targets and Kurt with Corinna in tracking results

Due Date: Targets set by February and monthly report on results after

ADVICE ON BUILDING YOUR PLAN

- Be specific whenever you can
- Action items should be detailed and provide explanation on how it ties to achieving the strategic goal, if it is not obvious
- Seek collaboration from sources more experienced and more intelligent
- Know your team and make necessary personnel changes or assignment changes to accomplish the plan

EXAMPLE OF STRATEGIC PLAN

Word template available from Kurt
Email him at kwankier@emmcconsultants.com
ADVICE ON BUILDING YOUR PLAN

- Only set goals and action items those implementing can achieve:
  - You have higher chance of failure if you set goals for those above you, unless you have their buy-in
  - In some cases the action item may simply be an assessment of new equipment, services, satellite, marketing campaign that will be presented to those above you
- Every action item needs to have someone responsible for stewarding it to completion
  - Once it is set, make sure those employees know their responsibilities.

ADVICE ON BUILDING YOUR PLAN

- Tailor the plan to the doctors, managers, or staff involved.
  - Some doctors need full details, other doctors find setting full details confining
  - If you plan to share this with your staff, write it in terms they understand and can apply to their daily work
- Each action item needs an outcomes measurement
  - You may struggle to find an measurement, but
  - Step back and look again
  - Even just completing an assessment is an outcome if you are serious in doing it

Throughout the year, new unanticipated opportunities may arise. Do not let the plan limit taking action with these opportunities
- Simply assess whether the opportunity trumps other goals or action items
- Do the research

With a Strategic Plan, We Have More Opportunities to Celebrate When We Accomplish Our Action Items and Achieve Our Goals
A Year End Review Can Be Very Rewarding!

Do We Always Avoid This Outcome in Our Decision Making?

NO
But It Happens A LOT Less

With a Strategic Plan, We Are More Prepared to Weather A Storm
We are what we repeatedly do. Excellence then, is not an act, but a habit.

Aristotle

Questions?
Ideas?
Input?