



Streamline Your Practice: The Art of Efficiency and Delegation

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Financial Disclosures

Macuhealth: speaker/consultant- paid honorarium

Coopervision: speaker/consultant- paid honorarium

GPN: speaker/consultant- paid honorarium

Zyloware: speaker/consultant- paid honorarium

All financial relationships have been mitigated.



Jennifer Stewart, OD

- Chief Vision Officer: OD Perspectives
- Co-founder/Chief Vision Officer: Performance 20/20
- Executive Board: International Sports Vision Association
- Adjunct Assistant Professor: NECO
- Professional Editor: Independent Strong
- Theia Award for Innovation : Women in Optometry
- Emerging Leader Award: OWA
- Professional Affairs Team: Coopervision
- Consultant: Macuhealth
- Consultant: Zyloware
- NECO Alumni Board of Directors : Delegate

Efficiency: the ability to accomplish something with the least waste of time and effort; competency in performance

Goals

- What would you do with more free time?
- Where can we make changes in our practices to streamline and become more efficient?
- What can you delegate TODAY, and how?



How can we build a streamlined, efficient practice and maximize our time and profitability?

Poll #1

- What would you do with more free time?



Time = Money

- What would you do with more free time?
 - See more patients
 - See less patients
 - Work ON the business
 - Staff training and development
 - Other optometry work
 - Take time off!
 - ??

Does Time Matter?



- Doctors
- Staff
- Patients!

Do we make things more difficult than they need to be?



Be Authentic

- What is the vision of our practice?
- Who are the patients we are trying to attract?
- What are they looking for in a practice?
- What matters to them?

Poll #2

- What is your biggest pain point?

A woman with blonde hair in a ponytail, wearing a red sweater, is looking at a shelf of yellow folders in an office. She is reaching out with her right hand towards one of the folders. The background is slightly blurred, showing more shelves and folders.

Where Can We Make Changes?

- Patient communication
- Patient ordering
- Office ordering
- Billing
- Delegation

Making An Appointment

- How do you prefer to make appointments for yourselves and family?
- How can we make it EASIER?
 - Phone
 - Email
 - Online appointment request
 - Chatbot
 - Schedule yourself

- 43% of patients prefer to book appointments online
- Average phone call to schedule an appointment takes 8 minutes (x how many appts scheduled per day?)
- 26% of appointments scheduled online are for same/next day – fill up empty slots
- 34% of new patients were able to make an appt outside business hours
- How long does it take your staff to make an appointment?






Solutions

- Solutionreach
- Revolution EHR
- Eye Cloud Pro
- Crystal Practice Management
- Patient Pop
- Demandforce



Contact Lens Ordering

- Patients WANT to order from us
- Do we make it more complex than we need to?
- How many steps does it take to order contacts when shipped to the office? 





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Solutions

- Dr Contact Lens
- Marlo
- CLX
- Yourlens.com
- ABBY
- Distributor based systems



Communication/Reminders/Forms

- “Arrive 15 minutes early to fill out forms!”
 - How many actually do it? 
- Be green
- Eliminate double entry
- Impressive!

Solutions

- IntakeQ
- Jotform
- EHR system



Who Does Your Ordering?

- Catalogs and catalogs and catalogs
- Bookmarked sites galore
- Staff time- where do we order this from?
- Who has the best price?
- Multiple shipping costs



“I can find it cheaper”

- What about sites like Alibaba?
 - Have to negotiate pricing
 - Large minimum order
 - Shipping= \$\$\$\$\$
 - Takes 4+ weeks
 - “Is this what I ordered?”



Solutions

- **OptaZoom**
- Bernell
- Amcon
- OptiSource
- Sigma Pharmaceuticals
- Hilco

Billing and
Coding

- Do you have a system currently in place?

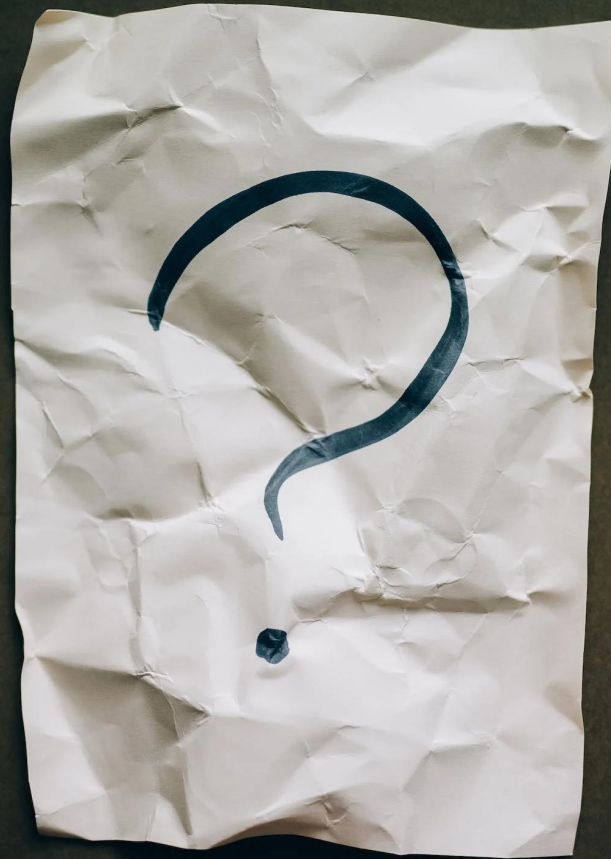
Yes- her name is
Heather!

Heather does
a great job!

- Homework – spot check 20 claims going back 90 days



- Did you receive payment?
- Were they rejected?
- Were they written off?
- Was the claim even submitted?



What would happen...

- If Heather was out of the office for an extended period?
- If Heather left the office?
- Do you have a plan in place?

Outsource or not?

Pros

- Knowledge base of federal government/payers
- Analytics help (A/R, payer updates, etc)
- Team always available- not dependent on staff member
- Efficiency (faster processing and payment)
- Reduce staff time/employee expense
- Efficacy (decreased denials/rejections)
- Profit- lower A/R
- Other services (eligibility/benefits verification, credentialing)

Outsource?

Cons

- Cost
- Trust/lack of control
- Patient/practice relationship
- Technology (EHR compatible?)
- Comfort level



Solutions

- CSEye
- RevCycle

Poll #3

- How many utilize a scribe in the exam room?

What Can They Do?

- Pretesting
- Patient history
- Review of systems
- VA/entrance testing
- Additional testing
 - Dry eye
 - OCT
 - Retinal photos
 - Visual fields
- Scribe
- Contact Lenses
- Patient education
- Refraction

Time = money

- Average revenue per exam: \$306 (MBA)
- 15 exams per day= $\$306 \times 15 = \$4590/\text{day}$
- With scribe- could you see an additional 2 patients/day?
 - \$612/day increase, \$3060/week, \$12,240/month, \$146,880/yr (48 weeks)

- What are your metrics?



Virtual?

Virtual assistants/technicians

- Hello Rache
- Eye Help You

What Else Can You Delegate?

- Website/SEO
- Social Media
- Bookkeeping/Payroll
- HR
- Marketing
- Optical sales/consulting/strategy
- Staff training (Spexy)





What do you like to do?

And what do you NOT like to do?



How Do I Do It?

- Hire the right people
- Who, not how!
- Educate
- Communicate and provide feedback
 - Praise openly, correct privately
- Accept that mistakes will happen
- **Get out of your own way**

What can happen?

- Expand patient care
- Financial growth
- Decrease stress/workload
- Improve happiness!



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What is the worst that can happen?



Thank you!



CONNECT



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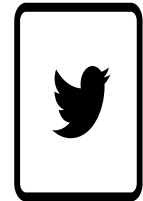
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