Introducing Learning Successfully Into a Practice

BY SANDY T. FELDMAN, MD, MS

Practicing state-of-the-art medicine with excellence involves implementing new techniques, technologies, and customer service skills as well as more efficient processes into one’s practice. This presents a constant challenge to the status quo for physicians and the entire staff. All members of the practice must learn new things. Some individuals are excited by the possibilities, whereas others are content to perform their duties in much the same way they always have.

To overcome the status quo and push staff out of their comfort zone, practitioners must understand that resistance to change is the norm. Implementing new procedures is great, but without the assistance of the team, the initiatives will likely fail.

THE EDUCATIONAL PROCESS

Practitioners can follow some simple steps with their teams to implement new ideas and come to embrace continuous learning as a core value. Communicate, communicate, and then, communicate again. Discuss what is going to happen, who is responsible for training and learning, and when everyone will need to know the information. Implement new educational materials and standard operating procedures in the rollout. Without a clear plan, all efforts may be wasted.

FORMAL TRAINING

Use a formal training process to make sure that all staff members learn what is required of them. At my practice, we schedule regular meetings and training sessions in the office. We use lectures with handouts and supplementary online resources, including videos. We invite guest lecturers and enlist various staff members to help with training so that the team does not tune out. Role-playing various scenarios with staff members hones their skills. Wonderful resources (including books, DVDs, and online materials) are also available from eye care organizations.

SIMPLE PRESENTATIONS

Present material simply. To quote one of my mentors, “It is easy to make things complex and complex to make things simple.” Simplicity is the key to success, and training is no exception. Make it easy for staff to learn.

MEASURING RESULTS

Not measuring the results of the training and holding staff accountable could lead to failure without a clear picture of why it occurred. We now perform in-office testing to measure the effectiveness of our training. This permits us to provide additional training and to incorporate more resources as needed, perhaps personalized for those not attaining the expected skill level.

MENTORSHIP

Senior members of the team must wholeheartedly adopt the new materials and processes. Without their buy-in, other staff members will develop shortcuts or refuse to learn what is required. Hands-on training for some is a key step before the introduction of real patients. Mentoring staff members by sitting next to them and working with them is very valuable. Practitioners should be available to answer the “why” questions informally over lunch, in between patients, in the clinic, or between surgeries.

REWARDS AND RECOGNITION

I recommend catching staff members doing things the new way. Without that recognition, learning is often a chore. Clinicians can demonstrate that training is important to the practice by participating themselves and having fun with the staff as they learn new things.

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When Staff Is up to Speed, Patients Also Learn

BY WILLIAM J. LAHNERS, MD

At our center, we are constantly striving to provide our patients with the latest technology. This necessitates a nearly continuous educational and training process for both our staff and our patients. When our staff is up to speed on new technology, it makes it more likely that our patients will have an opportunity to learn about the latest options. One of the mistakes that practices make when they are transitioning to laser cataract surgery and premium IOLs is letting the staff think they have to "sell" this technology. We try very hard to make it clear to our staff that we are not in the sales business; we are in the education business. My job and theirs is to make sure that patients understand presbyopia and what can address it. By educating patients on their options, we enable them to make informed decisions on their surgery. Very few of our patients walk in the door really knowing what a cataract is, much less presbyopia, astigmatism, and some of the other Greek and Latin combinations that we use routinely. Understanding these concepts is critical to their having an intelligent conversation with me about their options. An educated staff is the key strategic piece in the puzzle.

DO-IT-YOURSELF TRAINING

We conduct training in team meetings, lunch meetings, and in-service workshops. When our staff hears us describe technology, they tend to use similar language. This promotes continuity in our patients’ educational process. Our staff begins by describing something, and we finish using a similar style. One of the primary educational directives at our center is continual learning and achieving advanced certification. Like at most centers, the staff members who become certified receive a higher base salary. In addition, they have the intangible perks of greater responsibility, pride, and satisfaction.

The national meetings (American Academy of Ophthalmology, American Society of Cataract and Refractive Surgery) are great resources for staff education and are typically required continuing education for staff members who have certification. The information at these meetings tends to be elementary, but it can give our staff a more regional or national perspective than training at our practice. It is also builds our staff's confidence when they go to national meetings and feel very competitive with their knowledge of the subject matter. They come back proud of what we offer our patients, which increases the esprit de corps of the practice. It is said that bees and dogs can smell fear. I think patients can smell a lack of confidence, not just in the surgeon, but also in the staff.

INDUSTRY’S ROLE

Industry has been key to our success in educating our staff. There may be no better resource for a new technology than the company that invested millions (sometimes hundreds of millions) in inventing, testing, and bringing it to the market. We try to learn as much as we can from a company’s marketing specialists, practice consultants, clinical trainers, and clinical specialists. The best part is that these resources can usually be accessed at no charge to the practice.

CONCLUSION

Staff education is an ongoing process at our center, one that helps break up the monotony of our busy days and assists us in offering life-enhancing surgeries to our patients.

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Successful Staff Education Demands Proper Training

BY CARY M. SILVERMAN, MD, MBA

It is no secret that the success and accomplishments of your business are directly related to the performance of your staff. A great staff member not only excels at his or her daily tasks and duties, but he or she also makes your patients feel comfortable and educated about the services that your practice offers. Not all of these staff members have the characteristics that are needed for their jobs; some must be taught by their employers. At EyeCare 20/20, we would rather hire a diamond in the rough with no experience and train him or her than hire someone with “bad” experience. Several steps must be taken to create a knowledgeable, content employee. Five different aspects of training and workshops make our staff fully qualified.

TRAINING AND WORKSHOPS

No. 1. On-the-Job Training

New staff members follow our experienced technicians to learn how best to perform examinations, tests, and measurements on patients in our office (Figure).
No. 2. Online Training

Many medical ophthalmology equipment companies such as Carl Zeiss Meditec, Inc., and Marco offer online training classes on how to operate their equipment. Staff members are able to access this helpful information at any time to see how various testing equipment is used on patients and how to get the best results. The most valuable thing about this learning tool is that staff can use it repeatedly until they feel comfortable enough to use the equipment themselves.

No. 3. Equipment Training

When we purchase new equipment, we also schedule a hands-on training session with experienced trainers from the company that makes the equipment.

No. 4. Joint Commission on Allied Health Personnel in Ophthalmology Certification

Before becoming a full-time technician, we encourage our staff members to first become certified by the Joint Commission on Allied Health Personnel in Ophthalmology (JCAHPO) by completing and passing a home study course. We then suggest that they take the JCAHPO certification test for certified ophthalmic assistant or certified ophthalmic technician. EyeCare 20/20 incurs all costs involved in the training and testing of our staff. Once the candidate passes these important examinations, he or she receives a bonus and pay raise; in fact, the first pay raise is pegged to passing the home study course and test!

No. 5. Seminars/Workshops

JCAHPO also offers seminars and workshops to certified personnel for continuing education credits needed to maintain their certification. Noncertified staff may also attend.

In addition to these helpful training opportunities and workshops, there are several educational tools that you can provide in house on a weekly or monthly basis to further train your employees, even those who have been with your company for several years. For instance, provide your staff members with written instructions on how to perform your most common examinations and offer them handouts with general ophthalmic and medical terms in an employee manual.

Once a month, it is also beneficial to hold medical technology meetings where, as a team, you discuss the best ways to handle common office situations and how to improve with test-taking and common techniques. These meetings are also opportunities to make sure that every staff member is up to date on the latest office information. Encourage your staff to ask as many questions as they can at these times. The more they know and understand, the better experience with examinations and testing they will have.

CONCLUSION

Training and educating your staff can go a long way toward ensuring the overall success of your medical practice. Therefore, make sure you are following the necessary steps to guarantee your entire staff is as educated and well-informed as possible.

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The Educational Process Empowers the Staff

BY VANCE THOMPSON, MD, AND MATTHEW JENSEN, MBA

There are many different approaches to educating your staff. Although various tactics may be effective, be certain to ensure that your staff is involved in designing their own education within the

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areas that it affects them. We suggest trying some of the following strategies.

Our staff members here in Sioux Falls, South Dakota, really enjoy their time with the physicians. We have therefore created many different tactics by which the staff can carry out the doctors’ wishes every single day. Our first strategy is setting aside regularly scheduled time for the doctors to meet with the staff. This is a top priority in staff training and education. Topics of discussion include not only what staff members should say to patients but also how they say it.

The next strategy is to evaluate staff members’ command of medical terminology. We want staff members to have discussions with patients similarly to how we would interact with them. Once a year, each staff member takes a test on 200 to 300 terms related to the care we provide. We create the test throughout the year. Every team member must pass this test with a score of 90% or better. He or she keeps taking the test until that goal is achieved.

Staff members also complete an oral version of the same test. This is for when they field questions at church, family reunions, a bar, or other social settings. Conversations tend to revolve around what we offer at the practice, and as providers, we trust our own answers. It is important that our staff members respond in a similar fashion to the questions they hear.

We also regularly give the staff an opportunity to showcase what they know through coteaching at educational events, making presentations to our referring doctors, and being shadowed by visitors, referring providers, and their staffs.

As a result of these efforts, our team members’ firm foundation of knowledge enhances our patients’ care and experiences. We believe this educational process also empowers the staff in a way that improves their joy and satisfaction in the workplace.

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