



A TEAM APPROACH TO PATIENT CARE



When the members of an optometry office work together cohesively as a team, both patients and practice benefit.

BY THOMAS PINKSTON, OD

Patient care begins not when a patient first interacts with your office, but when the eye care provider first interacts with his or her team. Regardless of the size of the office, the doctors and staff work together as a team, and they should be treated as such in order to best serve and care for their patients. This is an easy principle in an educational sense, but more difficult in a daily practice.

We've all heard the sayings, "There is no 'I' in team," and "Teamwork makes the dream work." These slogans are great, but it's not so much

what you say as what you do that matters. So how can we effectively change our office culture in order to operate as a high-functioning team? Successful coaches thoughtfully organize their players to ensure the most successful season. Through our fair share of losing seasons, our office has evolved to create a repeatable team approach to providing eye care, which I'll share below.

PROVIDE A CLEAR STRUCTURE

Every good team has several key leaders. Through these leaders,

communication can be better targeted. In our office, we break down our overall team into four smaller teams: patient coordination, technicians, optical, and doctors. Each team has a clear leadership structure, communication procedures, and responsibilities.

Each team also has a designated team leader, or quarterback, who acts as the responsible party for the success of that team. This individual is not the "boss" of the team, the most important person on the team, or the most vocal. The responsibility is designated to an individual who clearly and effectively understands the role of the team, the goals of the organization, and how to move the team in the correct direction. The team lead has two main objectives: 1) to ensure the team and its individuals have everything they need to be successful, and 2) to ensure that the team is moving toward the overall goals of the office.

CREATE TWO-WAY LINES OF COMMUNICATION

A football team doesn't just practice as a team repeatedly with no clear goals or objectives. The coaches set up individual practices for different aspects of the game. They meet and plan individual workouts for

different players. They also create a framework in which to communicate with the players and to allow the players to deliver feedback to the coaching staff.

Many health care offices excel at communication from the top down but lack communication from the individual up. We easily provide direction regarding how, when, and why we want things performed, but we can easily forget to address what individuals need and obtain feedback on how to improve.

Effective team communication relies on repeatable, reliable discussions, with information traveling both from the leaders of the organization to its individuals and from the individuals to the leaders. It's important to create opportunities for the entire office, each team, and the team leads to give feedback to each other and also to the managers of the practice.

We've found it effective to hold short, regular weekly meetings to facilitate these conversations. Our office has a general team meeting with the entire office, individual team (eg, optical) meetings at the direction of the team lead, and team leader meetings with office management to ensure and discuss the direction of the practice. Regular communication allows each team to evolve and work more effectively as a unit. Additionally, it allows each individual team to focus on its departmental goals. We have found this particularly helpful when we need to make small changes to individual teams and office protocols.

SET CLEAR OBJECTIVES AND GOALS

Before the start of the season, each football team doesn't just hope to be the best. The coaches must establish clear goals to win a conference championship, get into the playoffs, and win the big game.

Not only do our team members want to understand our organization's vision and goals, they yearn to. It's important

AT A GLANCE

- Effective team communication relies on repeatable, reliable discussions from the leaders of the organization to its individuals and also from the individuals to the leaders of the organization.
- The success of an optometry team isn't dependent on how it responds when it wins, but how it accepts its losses and learns from its mistakes.

that our team members understand not only the "why" but also the "how" to accomplish our goals. If the team doesn't understand the reasoning behind a change or procedure, it is more likely that it will not be successful.

We discuss our long-term goals at least twice a year in larger team meetings or at a retreat. We try to make these events fun and engaging for staff members. We allow the team to participate in the "how" once we share our goals and our "whys." Additionally, we hold regular discussions to analyze the "whys" of our short-term goals. These discussions ensure that everyone is aligned with the direction of our practice and that our long- and short-term objectives are in alignment.

ADOPT A PLAYBOOK

Once trust is established, a good coach may allow his quarterback to call an audible at the line of scrimmage. At the end of the play, regardless of the end result, the coach will discuss with the player what he or she saw, why the player needed to make that particular last-minute change, and how the team can better prepare next time.

Our goal as the leaders, or coaches, of an organization is to give our team a clear playbook to use as a reference in order to be successful. Much like a great quarterback can read the defense, our team leaders and members can read situations from different perspectives and many times make

the changes needed to be successful.

After a clear structure has been established, communication is flowing both ways, and the objectives are clear, it is time to encourage each team to conquer its own objectives. This does not mean to let them run wild without direction or oversight. We must ensure they have everything they need to be successful and allow them to attack issues as they arise, just as a great coach will allow a quarterback to call plays when appropriate.

Practice owners, managers, and doctors cannot be everywhere at one time. How can we successfully deal with upset patients demanding a refund in optical, patients showing up late, emergency phone calls, training of new staff members, etc., all at once? Our teams deal with unexpected events on a daily basis. Training each member and then empowering them to handle their own situations makes our office that much better.

TAKE OWNERSHIP OF MISTAKES AND REWARD WINS

Your team will not win every game or play their best every time. They'll make mistakes as a group and as individuals. The success of an optometry team, just like that of a football team, isn't dependent on how it responds when it wins, but how it accepts losses and learns from mistakes. A team will come together or be splintered apart

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during tough losses. How organizational leaders react will determine whether it will be the former or the latter.

As leaders, we must take ownership of every loss or mistake, regardless of how close we were to the faulty decision. If a front desk team member made a mistake quoting charges and upset a patient, it is our responsibility. If our optical staff billed a lab incorrectly and we lost money, it is our responsibility. If a patient is upset with his or her vision in glasses, even if another doctor in the practice originally saw the patient, it is our responsibility. Was the mistake due to poor training, a bad fit of employment for our office, or just an honest mistake? Regardless of the reason, we, the leaders of the organization, are responsible for the loss, no matter what. Taking responsibility, however, does not mean that we can't address

the causes with individual team members and try to improve. It does mean we need to create an environment of ownership instead of placing blame.

A great coach doesn't immediately discuss how bad his quarterback played after a loss. The coach will first analyze how he or she prepared the team, called plays, and selected starters. The coach is prepared to make tough decisions (cutting players, hiring and firing coaches, or changing starting lineups) if needed, but he or she will first look inward for answers.

When our team wins, we celebrate individual achievements and are the last to claim personal success. We elevate our team's success above our own personal ego. We use each win to ensure that team members understand their importance to the team. Let the quarterback, offensive line, and kicker raise the trophy. They may not have stayed up all night devising

plays, but they definitely played their own roles to ensure success.

IT TAKES A TEAM

Optometry is a team sport, and if you treat it as such you can improve your patient care. I won't pretend to have answers on how you should lead your team. Your team is unique, with its own strengths and weaknesses. However, I can tell you that how you approach and structure your team can be universal and repeatable, regardless of other variables. Creating a clear, consistent team atmosphere will improve staff engagement, office morale, and, ultimately, patient care. ■

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