



SAGE ADVICE FOR BUSINESS-MINDED ODS

Your colleagues share some of their best tips.

BY KAREN ROMAN, EDITOR-IN-CHIEF

To complement this issue's cover focus on the business of running an optometric practice, *Modern Optometry* convened a panel of eye care professionals with a range of experience and expertise in this area. We asked this group of successful optometrists to share some of the best business advice they've gotten, as well as lessons and insights they've learned from their own experiences. Whether you're looking to open your own practice, start a fun new venture on the side, or even just improve your own business savvy, the insights they share here are worth digesting. Read their origin stories on the next page. Now, get ready to soak in some wisdom.

WHAT'S THE BEST PIECE OF BUSINESS ADVICE YOU'VE EVER RECEIVED?

Solomon Gould, OD, MBA: The best business advice I ever received was from a patient during my clinical training. He simply said, "Never treat

two patients the same way," and explained the generational differences and the whole "work smart, not hard" phenomenon. I spent the remainder of my clinical training and early years of practice learning about the different generations. I have since applied that knowledge to every business decision I make and with every patient I see. It is hands down the number-one reason why I have been successful in my career.

Roxanne Achong-Coan, OD, FAAO, FIAOMC, FSLs: Have the best bedside manner, and patients will be loyal to your practice. This advice was given to me by one of my preceptors during my fourth year of clinical rotation in optometry school. I have always practiced with this mentality and have watched patients grow up in my practice.

Leslie O'Dell, OD, FAAO: Service to the patient should always come first. When you put the patient first

and focus on delivering the very best examination, the rest will follow.

Justin Bazan, OD: Find what works, then do more of it.

Jaclyn Garlich, OD, FAAO: Make sure you know how to do everything in your office, from checking out patients to submitting insurance, inputting remits, etc. Once you understand it, *then* delegate!

Danielle Richardson, OD: The only thing constant is change, and the experience of 2020 highlights that. One piece of advice all of my mentors have instilled in me is that you need to be constantly learning, evolving, and growing, because what worked for you 5 years ago is not guaranteed to work for you today. Keep that beginner's mind, continue to learn and grow, and stay abreast of what's going on so that you're able to naturally change rather than resist it and find yourself out of business.



THE PANELISTS INTRODUCE THEMSELVES



JUSTIN BAZAN, OD: After realizing that I'm pretty much unemployable, and after I was fired from a corporate job, I decided

to build something of my own. I opened up cold in 2008, which eerily reminds me of how my practice is operating in 2020. Before COVID-19 we had three optometrists, plus technicians, opticians, receptionists, and a vision therapist, all working in a full-scope, busy office 6 days a week. At the moment, it's just one all-star OD grinding away Monday through Friday with a small but mighty team.



ROXANNE ACHONG-COAN, OD, FAAO, FIAOMC, FSLs: I am in a private group practice along with two associates and a staff of

20 employees, which includes opticians, receptionists, billing, lab, technicians, and an office manager. We purchased an existing practice in Orlando and after being there 5 years, moved to a larger office and have been there 15 years. We see patients ranging from infants to geriatric age, and we provide primary care, treat ocular disease, fit specialty contact lenses, and perform dry eye therapy and neuro-optometry services.



PATRICIA FULMER, OD, FAAO: Over my 8 years of practice, I have had the pleasure of working with a variety

of staff and patients, first as the Center Director of a comanagement facility and then as an associate in a group private

practice. Currently, though, I am excited to be working toward opening my own cold-start private practice in Huntsville, Alabama. The mission of my practice is to bring the highest level of full-scope eye care to my community while making each patient feel like family. At the beginning I will be employing a small staff that will include an optician and a receptionist, and I'm looking forward to growing the team to include technicians and scribes as business allows. My patient base will include all ages, with a large portion requiring disease management.



JACLYN GARLICH, OD, FAAO: After almost 10 years of vowing I would never buy my own practice, I purchased an

established practice in Boston's Financial District in January after working there since 2018! The timing of buying a practice and then closing for 9 weeks due to COVID-19 was not ideal, but what doesn't kill you makes you stronger, right?



SOLOMON GOULD, OD, MBA: I have two private standard family optometry practices, both of which I took over from previous

ownership. The services we offer continue to evolve as the scope of optometric practice evolves, which is very exciting. I have a stellar team at both locations, including an optician who has been with the company for 44 years and an administrator who has been with the company for 35 years. I work hard to make sure they know they are valued and that their loyalty is appreciated.



DANIELLE RICHARDSON, OD: I am the primary optometrist at a boutique private practice called Zak in

West Hollywood, California. We have been open for about 2 years, and I've been with the practice since the beginning. Because of our location, we see a lot of people who work in the film and entertainment industries. We have state-of-the-art equipment and provide comprehensive eye exams. One of the key founding principles of Zak is to include eyes as a part of the wellness conversation, so it was a natural fit for me to practice here because I already had a holistic wellness company, Fierce Clarity, and it's been cool to integrate the two in support of our patients.



LESLIE O'DELL, OD, FAAO: Medical Optometry America is a new practice model devoted exclusively to medical eye care. My

location is the first in the country and is opening from the ground up. Our patients come from a variety of sources. Our ophthalmology colleagues, who are feeling the burden of the aging of the population, count on us for nonsurgical medical eye care as they focus on surgical care. We also serve as a resource for refractive-based optometry colleagues who are looking for expert opinions on the management and care of their dry eye or glaucoma patients. Medical Optometry America has state-of-the-art diagnostic technologies such as OCT angiography, multifunctional tonometry, and corneal hysteresis, which provide endpoints that can affect patient outcomes.

Patricia Fulmer, OD, FAAO: My dad, who is a former business owner in the health care space, told me that opening and running a business of my own would be hard—harder and more work than I ever thought it'd be—but

that if I knew it was what I really wanted, it would also be wonderful. Now every time I feel overwhelmed or overworked I remember what he told me, and it helps me keep pushing forward so that I can enjoy the “wonderful.”

WHAT IMPORTANT LESSONS HAVE YOU LEARNED DURING THIS PANDEMIC THAT YOU PLAN TO CARRY WITH YOU INTO THE FUTURE?

Dr. Coan: We realized the importance of having alternative



methods of communicating with patients such as social media, email, text messaging, website, phone, etc. We've also seen the value of making things convenient for patients, which we've tried to do by offering telehealth services, installing pickup boxes outside of the office for after-hours transactions, and allowing online payments. Having an online store for the sale of contact lenses and glasses is another patient convenience. We will be setting up an online store so that patients will be able to select frames and have them mailed to try on at home. The lens measurements will be done using their smartphones. The patients will then return the frames to us so that we can order the lenses.

We have also decreased the examination time spent by patients in the office. During the pandemic, we started taking case histories before appointments, either via an online intake form or by phone. We also instituted procedures so that patients can complete the checkout procedure in the exam lane, where they were socially distanced from other patients. Patients have appreciated the resulting efficiency of their eye exams.

Dr. Garlich: Communication is key. During the lockdown period, I was in frequent email communication with my patients, offering genuine and helpful advice for common eye complaints and reminding them that I was there for them. We implemented telemedicine, came up with creative ways for patients to try on glasses, made our patient forms electronic, and implemented online contact lens ordering, to name just a few things. Honestly, I should have been doing many of these things before the pandemic, so the silver lining here is that COVID-19 pushed me to be more efficient and to meet patients where they are. Adapting is crucial!

Dr. O'Dell: Medical optometry is an essential service. Communication

is critical. Building open lines of communication with a team you trust is essential to maintaining success during challenging times.

Dr. Richardson: I would say the important lesson is to be able to pivot in an authentic way. During times of change such as this pandemic, many people try to copy what everyone else is doing. But what works for one is not necessarily going to be successful for everyone. You have to understand yourself, understand your niche, and pivot accordingly.

We were able to decrease our number of patient care days without seeing a significant reduction in revenue because we used creative ways to make sure our patients were converting. We instituted extra safety precautions, which patients really like. We've also changed our content and our online messaging regarding what we're communicating to patients.

Dr. Gould: I learned a lot of valuable lessons during the global COVID-19 pandemic that I now foster daily and will continue to do indefinitely. First, always remain open-minded and resilient with your practice offerings, always keep the consumer in mind, and never succumb to the strategic inertia phenomenon (ie, continuing to do what you have done because it has been "successful enough"). Second, never forget that your patients and customers are human. They, like you, need communication, and not just once a year at the annual appointment reminder anniversary. Third, build a team that does not consist of sunshine patriots and summertime soldiers. My team really stepped up to the plate this year, selflessly and without hesitation, to help as much as they could from a distance while I was holding down the fort during the thick of the mandated urgent-care-only period.

Dr. Fulmer: For me, the pandemic highlighted just how quickly everything can change. Concepts that had always

been a sure thing in my world suddenly weren't. This observation drove home the fact that you can't afford to become complacent in life, whether in business or in personal spaces, and that you should always plan, prepare, and try to stay three steps ahead. This could mean trying out new business endeavors before they become mainstream. For example, practices that already had telemedicine services in place were much more comfortable with adapting to new procedures than others. This year also highlighted the importance of saving as much money as possible despite a steady income stream, and simply spending quality time with family and friends whenever you can. Take nothing for granted.

Dr. Bazan: Do more with less! Strip your business and life down to the essentials, then add back in the things you love, followed by the things you like. I learned not to sweat the small stuff and that most of life is small stuff!

IS THERE ANYTHING YOU WISH YOU HAD KNOWN OR THAT SOMEONE HAD TOLD YOU THAT WOULD HAVE MADE LIFE EASIER IN STARTING OR MAINTAINING A PRACTICE?

Dr. Richardson: One thing that would've made my life easier is having known that all experiences are useful. They provide information, whether it's information regarding something you like or want more of, or whether it's information about something you don't like or you want less of. Or the experience itself might be neutral and merely provide information.

As a new graduate, I was dissatisfied with some of the jobs I had. Instead of hating my job and making myself miserable, I wish I had had the perspective to see that these were learning experiences. Take it as such and move on. I would have realized that I don't like high-volume optometry. All of the things I learned from those experiences have helped me create the situation I'm in now, which is a perfect fit for me.



FAVORITE GO-TO BUSINESS RESOURCES

HERE'S WHAT THE BUSINESS-SAVVY OPTOMETRISTS ON OUR PANEL LIKE TO READ OR LISTEN TO FOR INFORMATION AND INSPIRATION

SOLOMON GOULD, OD, MBA: I am a big fan of *Harvard Business Review* for business insights, research studies, and other intellectual pursuits. I also greatly enjoy the Facebook group “ODs on Facebook” for a combination of inspiration and “Is it Friday yet” comic relief and venting. There is something invaluable about the connectedness and relatability of professionals living and experiencing the same thing day in and day out. I often find myself wondering how many of my fellow optometrists, through “on the job training,” feel like unofficially certified counselors or therapists. Perhaps I could start a new dual program for future optometrists?

JACLYN GARLICH, OD, FAAO: I turn to my friends who are practice owners. I had (and still have) so many questions, and having a support group to bounce ideas off has been invaluable.

DANIELLE RICHARDSON, OD: I love the *Wall Street Journal's* podcast, *Secrets of Wealthy Women*. The hosts are always interviewing titans of industry—women who have blazed trails and created amazing things. When we think about success among women, money is not always a part of the conversation. I like this podcast because you not only get general business principles and advice, but you also get tips and ideas about resiliency and ways to build wealth. It also serves as a gentle reminder that the gender pay gap is real, and a big part of that is because women don't negotiate or think about money the same way as men.

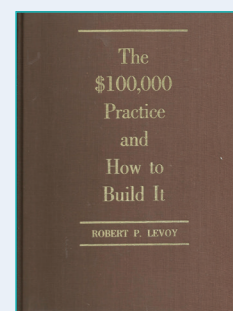
ROXANNE ACHONG-COAN, OD, FAAO, FIAOMC, FSLs: I read a variety of magazines, do my own online research, and browse



interviewing titans of industry—women who have blazed trails and created amazing things. When we think about success among women, money is not always a part of the conversation. I like this podcast because you not only get general business principles and advice, but

social media, but I find email blasts from certain groups, such as the Gas Permeable Lens Institute, and connecting with other doctors for practice management ideas to be the most beneficial.

JUSTIN BAZAN, OD: I have a big, old-school book from 1966 by my favorite optometric author, the late Robert P. Levoy, OD, called “The \$100,000 Practice and How to Build It.” Think oversized, dusty hardcover, missing the dust jacket, dinged corners, and yellow paper. It sits open on my dresser, and every day as I get dressed I read a page from it—sometimes more, sometimes less. It just sits there, nudging me to get better daily. Many of the business principles are solid for modern times, and even the outdated ones get me thinking.



PATRICIA FULMER, OD, FAAO: I really enjoy Tim Ferriss' online content, especially his podcast, *The Tim Ferriss Show*, and some of his videos and TED Talks. Some are business-oriented, some are just life-oriented. For optometry-specific content, the *Power Hour* radio show by Gary Gerber, OD, and articles from *CovalentCareers* can be great resources.



LESLIE O'DELL OD, FAAO: I have been reading a lot of books focused on the customer and creating the best culture for employees, taking notes from successful companies such as Disney, Chick-fil-A, and Netflix. You only have one chance to open your practice and first impressions are critical.

Dr. Coan: Don't be afraid to reinvest in your practice. Implementing the latest technologies has differentiated us from other practices. Also, continue to learn and stay up-to-date on the latest treatments. This will make you a more knowledgeable doctor and patients will develop more trust in you.

Dr. Gould: I began studying consumer psychology and psychology in general about 2 years into practicing. I learned every personality profiling insight that I could get my hands on and quickly realized that I could more easily and seemingly effortlessly connect with patients of every personality type because I understood and could

apply what they themselves related and responded to. For anyone who works with people, learning about personalities and generations are two of the best things you can do early in life. This knowledge will exponentially magnify your success. I apply both to my patient care, consulting, and public speaking.



Dr. Garlich: Be okay with the fact that you will be by far the most enthusiastic and motivated person in your practice. My practice is like another child. I'm always thinking about it and strategizing. But don't expect your staff to be as excited as you are all the time!

Dr. Bazan: Meditate daily.

Dr. Fulmer: It's okay to put yourself first sometimes. It doesn't make you selfish. You can only be the best version of yourself for others if you take care of yourself first.

Dr. O'Dell: Opening a practice is a whole different sphere of optometry. You are not only an eye care provider, but also a small business owner and entrepreneur. You need to be up to the challenge of what's required in this dual role: more time, more effort, and more dedication. It's important to know your weaknesses (eg, marketing, coding, billing) and rely on trusted consultants to help you in those areas.

WHAT ADVICE FROM YOUR OWN EXPERIENCE WOULD YOU SHARE WITH OTHER BUSINESS OWNERS OR BUSINESS-MINDED ODS?

Dr. Fulmer: If you have a passion for business and want something of your own, don't second-guess yourself, and don't listen to naysayers. You can absolutely do it, and there are numerous resources out there to help you. Team up with advisors and mentors, don't be afraid to ask for help, and don't overspend right out of the gate! You have plenty of time to strategically build your dream office so that it works for you, not the other way around.

Dr. O'Dell: Chase down your dreams and work hard to make them a reality. Surround yourself with experts to fill in knowledge gaps.

Dr. Garlich: If you want to buy a practice, get ready to work! I thought I

worked hard before I owned my practice, but now I'm on another level. It's greatly rewarding in many ways, but you will definitely work for it. More important, find a good team. That positive energy is critical to success!

Dr. Richardson: If you can't find it, create it. That goes for a work environment you're looking for, a business, a service, or anything else. If you feel there's something missing from the market, perhaps it is you who's supposed to fill that gap. You have to be up for a journey if you are going to pursue any sort of entrepreneurial endeavor.

Dr. Coan: Don't be afraid to ask and reach out to other people for help, and network, network, network. Ask others for advice, recommendations, or just support. You would be surprised how many people will be willing to help you and share their experiences and knowledge.

Dr. Bazan: Network and socialize with other owners.

Dr. Gould: It is natural for humans to avoid pain from a psychology perspective. For many doctors, it can be painful to get one's hands dirty on the business side because it can be an emotional rollercoaster being both a doctor and the practice owner. It is much easier to delegate responsibilities to the practice administrator, biller, coder, or other employee and to prioritize almost entirely the doctor role. I would advise fellow optometrists to learn as much of the business side as they can, or, as I like to say, to get their PhDs in their business. Billing and coding is arguably the linchpin for a practice's success and sustainability from a cash flow perspective. This is the one key area I would place above all others, with a strong recommendation to also learn the other back-office roles. ■

ROXANNE ACHONG-COAN, OD, FAAO, FIAOMC, FSLs

- Optometrist and Owner, Coan Eye Care & Optical Boutique, Ocoee, Florida
- Member, *Modern Optometry* Editorial Advisory Board
- coaneyecare2020@gmail.com; Instagram @coaneyecare
- Financial disclosure: None

JUSTIN BAZAN, OD

- Optometrist and Owner, Park Slope Eye, Brooklyn, New York
- Member, *Modern Optometry* Editorial Advisory Board
- dr.bazan@parkslopeeye.com; Instagram @justinbazan
- Financial disclosure: None

PATRICIA FULMER, OD, FAAO

- Optometrist and Owner, Legacy Vision Center, Huntsville, Alabama
- drfulmer@legacyvisioncenter.com
- Financial disclosure: None

JACLYN GARLICH, OD, FAAO

- Owner, Envision Optometry, Boston, Massachusetts
- Member, *Modern Optometry* Editorial Advisory Board
- jaclyngarlich@gmail.com; Instagram @2020glance
- Financial disclosure: None

SOLOMON GOULD, OD, MBA

- Optometrist and Owner, Scenic Eye Care, Saint Paul, Minnesota
- drgould2020@gmail.com; Instagram @dr.gould2020
- Financial disclosure: None

LESLIE O'DELL, OD, FAAO

- Clinical Director, Medical Optometry America, York, Pennsylvania
- Chief Medical Editor, *Modern Optometry*
- helpmydryeyes@gmail.com; Instagram @fullscope_od
- Financial disclosure: None

DANIELLE RICHARDSON, OD

- Therapeutic Optometrist, Zak, Los Angeles, California
- Owner, Fierce Clarity; fierceclarity.com
- d.richardson564@gmail.com; Instagram @fierceclarity
- Financial disclosure: None