



Teri Deabler, TMA

Creating and Retaining a High Functioning Team

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TMA Practice Consulting
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Welcome!

Teri Deabler, CMPE, COE

“A leader’s task is simple: to get the job done and develop employees. Coaching is one process with both effects.”

Sir John Whitmore

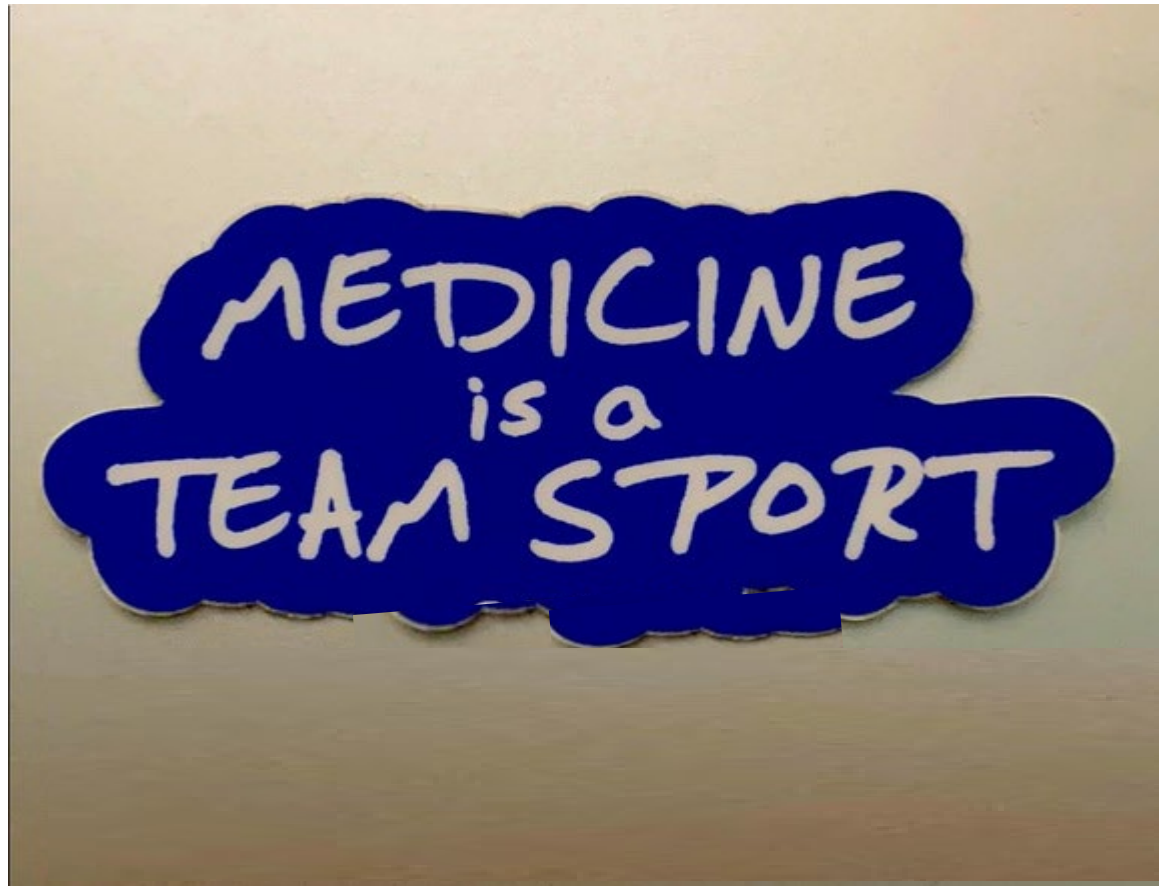




Agenda

- Recruiting, Onboarding, and Training Your Team
- Huddles on Game Day
- Pre - and Post-Game Strategizing
- Celebrating the Wins and Learning From the Losses!
- Re-signing Your Best Players

Creating Your Team





Recruiting Your Team

- Start with the players you already have.
 - Assess their skills – make position changes if necessary.
 - Post the job internally.
- New recruits
 - Recruiting bonus – internal referrals
 - Make your ad stand out by using questions instead of statements.
 - Don't be afraid to use aptitude tests and test for skills.
 - Schedule interviews with the whole team.
 - Sell the mission, vision, and values of the practice.
Make them want to work for you!



Recruiting Your Team

- New recruits – continued
 - Make an offer in writing. Include the job description with a place for a signature of acceptance on both the offer and the JD.
 - Always check references and run background checks.
 - Offer a fair wage - check salary surveys for up-to-date data
 - Spell out the total compensation package in your offer letter, e.g. – paid time off, health/dental benefits, retirement benefits, continuing education allowances, etc.



Onboarding Your Team

- Make the best “first-day” impression.
 - Have a gift bag ready with branded item(s) like a pen, Yeti-type cup, or polo shirt to wear on Fridays.
 - Prepare a training binder for the new team member.
 - Place your team’s mission/vision/values statement on the first page.
 - Include a “General Information” document for a quick reference guide.
 - Email orientation schedules with links to training documents, websites, and handbooks.
 - Assign a “mentor” from the team.
 - Have a mid-morning coffee meet-and-greet or afternoon ice cream social for everyone to stop by to meet the new team member.



Onboarding Your Team

Orientation checklist sample

- Complete W4, I-9 direct deposit forms
- Sign off on job description
- Distribute log-ins and passwords – EHR, email
- Sign off on employee handbook completion
- Discuss benefits – eligibility and choices
- Distribute list with paydays and holidays
- Complete emergency contact form
- Distribute mission statement
- Complete HIPAA and OSHA training
- Distribute organizational chart
- Distribute general information sheet
- Sign off on compliance code of conduct
- Distribute emergency plan of action
- Discuss peer recognition program
- Review parking rules
- Distribute access card and review policy
- Complete the “My Favorites” list



Onboarding Your Team

- Continue to communicate.
 - Follow through on the promise to meet with new team members at regular intervals. Get their feedback and let them know you value their opinion even though they are the “newbie.”
 - Create a 90-day evaluation form with a place for their feedback.
 - Don’t be afraid to extend an introductory period.



Training Your Team

Invest in their skills and knowledge.

- Online subscriptions can fulfill the required training as well as advance their skills.
- Host monthly “lunch and learns.”
- Have a formal continuing education policy with a stipend amount by position.
- Create an in-house library of training material.



Huddles on Game Day

Reviewing your game plan is strategic.

- Print the day's schedule and discuss any possible deflections that could happen.
- Work out any problems you foresee and know ahead of time what patients are coming in and why.
- Whenever possible, be visible in the clinic.



Pre- and Post-Game Strategizing

- Communicate any changes to the line-up or game plan.
 - Develop a monthly newsletter that informs everyone of big and little events happening at the practice.
 - Send email for important, but not crucial, information.
 - Have regular staff meetings. Make them a positive experience and not something they dread.
 - Involve them in the process.

Pre- and Post-Game Strategizing

WHAT'S NEW @ EPA

EYE PHYSICIANS OF AUSTIN, PA

IN THE NEWS

The Building Project: The project is moving at break neck speed now. Much is being done to get us ready for move in on June 1, 2013.

The Workflow Design Committee has been meeting regularly and doing a great job I might add, at process mapping and deciding on office equipment needs. We are not finished yet, but making great strides to have us all ready for move-in day.

Dr. Thorne, Debbie and Cathy have finalized the design for the Optical Department. I'm sure it will be beautiful!

We have a first floor tenant who will be taking 2/3 of the space—Korman Jewelers will be moving from Lamar Blvd. to 5011 Burnet Rd. At this writing, their move-in is scheduled for November 2013. We are hoping to lease the rest of the first floor space very soon.

Don't forget to remind our patients and visitors of the construction mess so they are prepared.



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APR 2013 / MAY 2013

- * Birthdays—Roger (5/1), Lily C. (5/11), Lisa (5/21), Jeanie & Jordan (5/28)
- * 401K/Retirement Meeting—April 25, 2013
- * Board Meeting—May 6, 2013
- * Moving Day—June 1, 2013

GETTING TO KNOW YOU

A warm welcome to our newest Team members—Sarah and Sonia. A big "thank you" to the Front Desk staff for their participation in Sarah's and Sonia's orientation and training. Great Teams are created with everyone's help.

Cecilia and Jason welcomed Isla Jae on April 11th and Mary and her husband welcomed David on April 9th. All are doing well. We wish them all health and happiness with their new bundles of joy.

Dr. Buckingham has been appointed to the State Board of Educator Certification. We know she will be great in any public role she takes on, but we wish her luck nonetheless.

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This and That

- ◆ The EXCELLENT DemandForce reviews just keep on coming! Words like—Professional, Pleasant, and Personable are just a few of the great things our patients have to say about us. Keep up the great work. The efforts do not go unnoticed or unappreciated.
- ◆ Have you checked out the BSM Consulting website? If not, you will be surprised at the great educational opportunities offered to you as a member of this Team. Even if you are not pursuing a different career path, there is information for everyone no matter what you do here at EPA. Take advantage of these resources which are free to you, the employee. If you need a login and password, see Christina or me (Teri).
- ◆ Last week was a time of great tragedy for our neighbors in West, TX and Boston, MA, and a time of great anxiety for all of us as we come to realize just how vulnerable we are. At the same time we, here at EPA, can look at it as how lucky we are to have escaped these tragedies ourselves. At times like these we notice the great heroes among us and we should stop to think about what we bring to this world. We have been given the time to say "I love you", "thank you" and "I'm sorry", if we find that some of these things have been left unsaid to someone who means something to us. Tomorrow is not guaranteed for all of us so don't put off tomorrow what you can do today. So that I don't leave something unsaid to you all, let me say how honored I am to work with such a fun and caring group of professionals. It is truly my pleasure to count myself among your ranks!

MAKING EPA "A GREAT PLACE TO WORK"

Having an informed and educated staff is very important to the success of a medical practice and the careers of its staff. Sometimes we get so caught up in what we are doing in our area of the practice that we fail to see all that is happening around us and all that we offer to our patients. Eric Fine made the suggestion that we inform our staff about the many treatments, products, procedures and services we offer here at Eye Physicians of Austin.

Many of our Doctors, but especially Dr. Buckingham, treat "Dry Eye"

The basics:

"Dry eye" is the term for when your eyes are insufficiently moisturized, either because they do not produce enough tears or because the tears have an improper chemical composition. It often occurs during the natural aging process, but it can also form as a result of eyelid or blinking problems, certain medications (antihistamines, oral contraceptives, antidepressants), climate (low humidity, wind, dust), injury, and various health problems (arthritis, Sjogren's syndrome).

In addition to being uncomfortable, dry eye can damage eye tissue, scar the cornea and impair vision. Dry eye is not preventable, but it can be controlled before harm is done to your eyes. Regular eye exams can detect dry eye early, even before symptoms become noticeable. Symptoms include:

- Irritated, scratchy, dry, uncomfortable or red eyes
- A burning sensation or feeling of something foreign in your eyes
- Blurred vision

Treatment for dry eye can take many forms. Non-surgical methods include blinking exercises, increasing humidity at home or work, and use of artificial tears or moisturizing ointment. If these methods fail, small plugs may be inserted in the corners of the eyes to limit tear drainage, or the drainage tubes in the eyes may be surgically closed.

If you would like additional information, please ask one of our Technicians or Physicians.

Pre- and Post-Game Strategizing

Kick-off party
for EHR transition





Pre- and Post-Game Strategizing

- Hold team activities outside of work.
 - Group participation in a 5K charity race
 - Christmas adopt-a-family instead of secret Santa among the team
 - Working at a food pantry or serving meals at a shelter
- Create a Peer Recognition Program.
 - Enlist one person from each department to design the program.



Celebrating the Wins!

- MVPs – also known as Employee of the Month
- Monthly celebrations – Themed potlucks cost the least, and everyone loves them.
- Rewarding little victories.
 - Reward behavior you want to see more of.
 - Be creative with incentives.



Learning From the Losses!

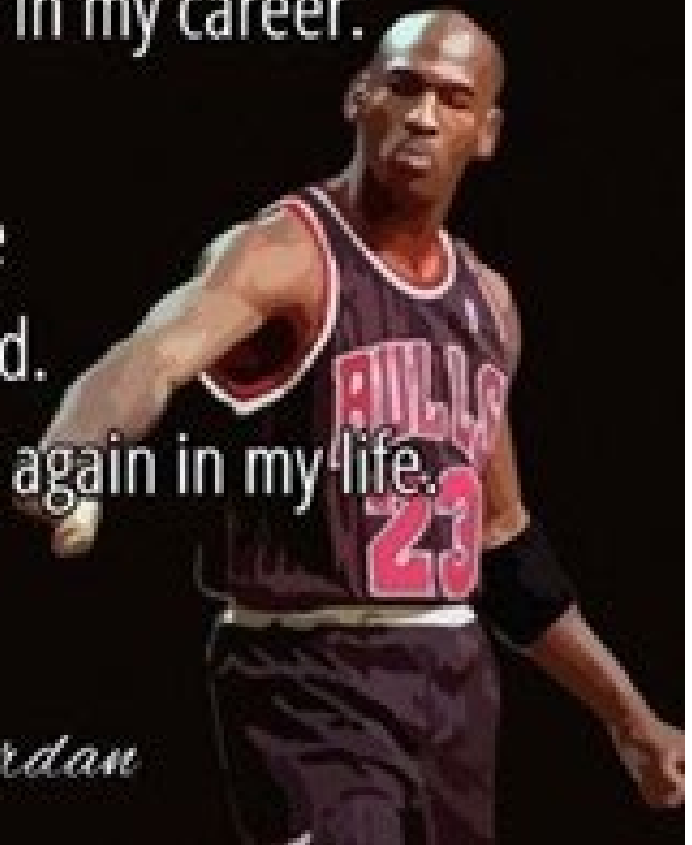
Let them know it's okay to ~~fail~~ **learn!**

- Create an experience transformer.
- Always de-brief on what went wrong and what you learned from it.
- Admit when YOU get it wrong or tell them about a time you really blew it but rallied back and what you learned from that mistake.
- Don't be afraid to do individual performance coaching.

Learning From the Losses!

I've missed more than 9000 shots in my career.
I've lost almost 300 games.
26 times, I've been trusted to take
the game winning shot and missed.
I've failed over and over and over again in my life.
And that is why I succeed.

- Michael Jordan





Re-signing Your Best Players

This is also known as a performance evaluation.

- Don't avoid doing these because you can't give a salary increase.
- Add behavioral expectations to your job descriptions so you can acknowledge them in evaluations.
- Consider one-time bonuses, extra time off, reimbursement of tolls, or flexible workday or hours, instead of pay raises.
- Don't limit your one-on-one meetings to annual performance evaluations.
- Be in tune to your team member's "normal" in order to recognize when something is different. Red flag!



Re-signing Your Best Players

"ONE DOESN'T HAVE TO
OPERATE WITH GREAT
MALICE TO DO GREAT
HARM.

THE ABSENCE OF EMPATHY
& UNDERSTANDING ARE
SUFFICIENT."

—

CHARLES M. BLOW



Thank You

9 THINGS GREAT LEADERS SAY EVERY DAY

Start every day planning to say each of these things to at least one person and watch the results:

1 "THIS IS THE SITUATION."

People want to know what's going on. Odds are, they'll find out anyway, or worse, fill in the gaps with conjecture. So be the kind of leader who ensures everyone knows. Don't sap morale, or rob yourself of your team's insights, and make people feel undervalued. Sound crazy to let them in on everything? Walmart founder Sam Walton did it for decades, and he did okay.

2 "HERE'S WHAT WE'RE DOING."

A leader is supposed to lead. People will offer great suggestions, especially if you're saying and doing everything else on this list, but you need to be able to make decisions and stand behind them. Your team needs to know where you're trying to take them, and how. Also, don't forget the crucial corollary: You need to be able to say "no," especially to moves that would be inconsistent with your plan.

3 "WHAT DO YOU NEED?"

This is crucial for two reasons. First, people need to know that you care about them on personal and professional levels, and that you want them to succeed. Second, if you've put together a great plan, you need to leverage every person's abilities to the maximum extent possible. If they are not able to give it their all, you want to know why.

4 "TELL ME MORE."

Let people know you're more interested in finding good answers than hearing yourself speak. Give others implicit permission to share their opinions--or heck, invite them explicitly, if you have to. Staying quiet is an invitation for others to offer ideas and insights.

5 "REMEMBER OUR VALUES."

You can't possibly stare over the shoulder of every person making decisions that affect your organization, but you can remind them to make choices that the rest of their team will be proud of. Reminding people of your values requires, of course, that you can actually articulate shared values.

6 "I TRUST YOU."

If you can't trust the people on your team, then they shouldn't be on your team. You need to trust their integrity, their judgment, their confidence and their passion--and you need to ensure that they understand how much you depend on them.

7 "YOU CAN COUNT ON ME."

The flip side of that last point is true as well. If your team can't trust you, they shouldn't do you the great honor of letting you lead them. So tell them you've got their back, and then work like hell to fulfill the promises you make.

8 "WE CAN DO BETTER."

One of the toughest, most crucial parts of leadership is to push your team to a higher standard than they might set for themselves. That means congratulating them when they do well, but also not coddling them when they don't live up to their potential. It also means admitting when you fail to live up to those standards, too.

9 "LET'S CELEBRATE!"

Don't create a culture in which the only reward for great work is more work. Instead, make it a practice to celebrate your wins, both large and small. This can mean big parties and bonuses, but it can be just as important to call people out for great work and congratulate them for their milestones--both professional and personal.



Questions?
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