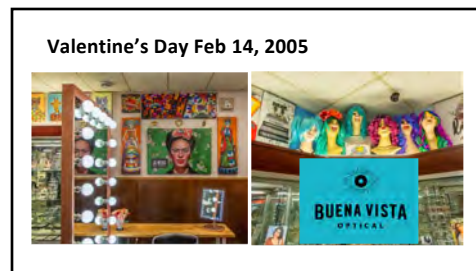




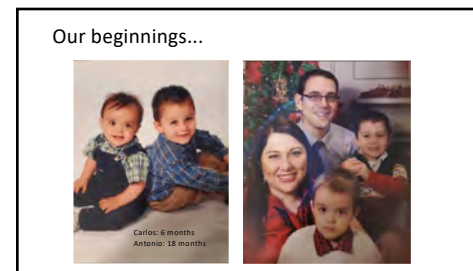
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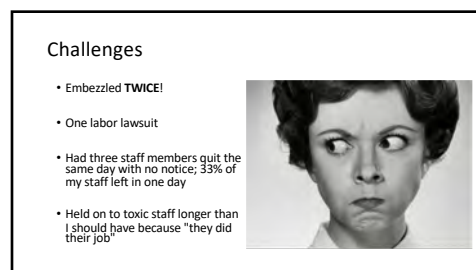
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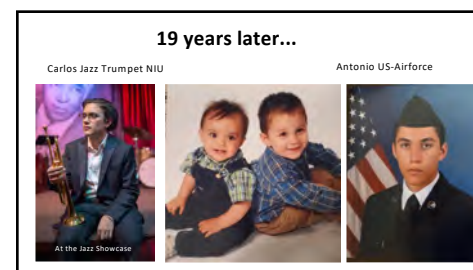
3



4



5



6

Take home one to three golden nuggets



1. Pay well + Perks
2. Hire the right people and put in the right seat (job)
3. Empower & Engage staff

7

POLL

1. Do you implement automation in your hiring and onboarding process?
Yes No
2. Do you perform regular performance reviews or check-ins with all of your staff and associates? Yes No Sometimes
3. How involved are you in the hiring process?
I do it all I delegate 100% I work with a manager or staff member

8



Why should I care about hiring the right people and putting them in the right seat (job)?

9

Doubled Practice Revenue 2021-2022



- **2019**
 - 1.2 million seeing patients 60 hours a week 22 staff members
- **2020**
 - 1.9 million seeing patients 30 hours a week 10 staff members
- **2021/2022**
 - 2.4 million seeing patients 30 hours a week 16 staff members

10



11

But Diana...



12

Human resources is reported as one of the TOP challenges in running a practice.



Hurdles are part of your journey in running a successful optometry practice.

13

Words don't teach,
life experiences do.

HELLO
I AM A...
**LIFELONG
LEARNER**

OPTOMETRIC
Management
SYMPOSIUM
Real Education for Patient Care and Business Management

14

If you're growing, at one point you will fail.
If you don't fail, you're not growing.



OPTOMETRIC
Management
SYMPOSIUM
Real Education for Patient Care and Business Management

15

It's what you do AFTER failing that
defines you.

A. Successful person

B. Everyone else

When things get tough, focus on the
solutions and having a strategy in place
to move forward successfully.

OPTOMETRIC
Management
SYMPOSIUM
Real Education for Patient Care and Business Management

16



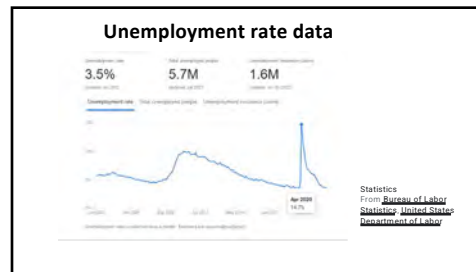
How can this
work for me?

17

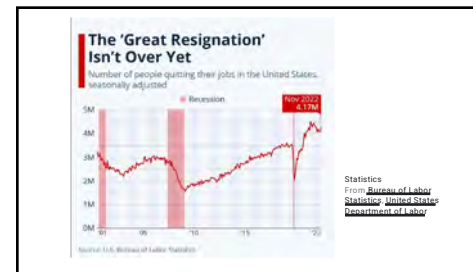
Our Current State



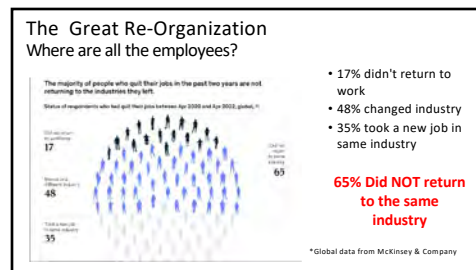
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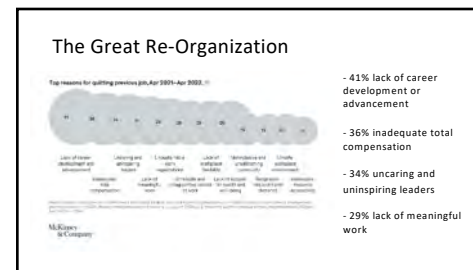
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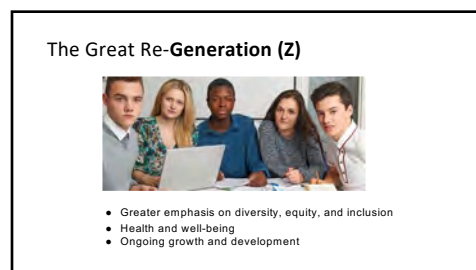
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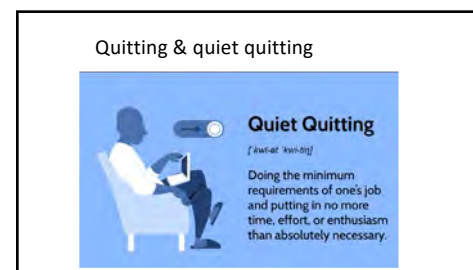
21



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23



24



25

Experts say: "Hire slow, fire fast."

Hire Slow, Fire Fast
By [Emily Washburn](#), April 1, 2021
Entrepreneur Magazine

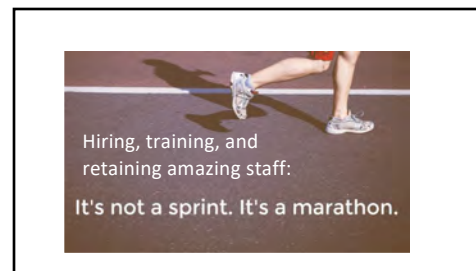
LEADERSHIP
Hire Slow And Fire Fast: Why Leaders Should Need This Advice
By [Jann Kefauver](#), Forbes Councils Member
[Forbes Coaches Council](#)

Hire Slow, Fire Fast
by [Gene McGowan](#)
Harvard Business review

Slow to Hire, Quick to Fire: Employment Dynamics with Asymmetric Responses to News
Cocooned by [Mathias Achter](#) & [Martin Schneider](#)

NBER
National Bureau of Economic Research

26



27



28

EMPLOYEE ENGAGEMENT

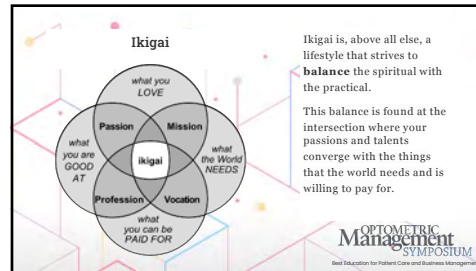
- Great compensation \$
- Flexibility
- Empowering & engaging them

29

Find your Barbara(s)

Video: Harvard Business school

30



31

How can we succeed moving forward?

• Studies show employees seek:

- Great pay with benefits + do what they love*
- Personal priorities like flexibility & mental health support
- **Empowerment:** Career development, advancement and supportive leadership that leads to **ENGAGEMENT**



*gg or side hustle they love

32

Surveyed 10 previous staff members and they said...

"For me, BVO provided me with stability and a sense of purpose. Working there had a purpose for me, less being a passion dear to my heart (Latinos) and working for the term goal of finishing school."

Secondly, I felt like part of a team that cared for their patients, but that also cared about me and my personal goals. My fixed work schedule allowed me to go to school and plan my school around my work schedule.

Lastly, I learned a lot from the BVO staff. They were very helpful and would propel responsibility, customer service, empathy, compassion, perseverance, leadership, and so much more.

It was this combination of it all that kept me working at BVO for over **ten years!**"

-Aida F
2 Master degrees



33

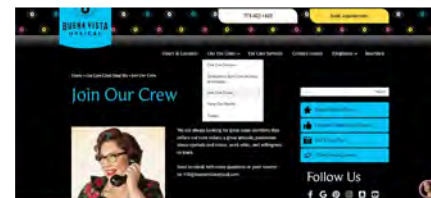
Finding Qualified Staff



- Word-of-mouth
- Patients & referrals (signage and ask!)
- Impactful job ad
- Social media, LinkedIn, other

34

Always hiring; always looking



35

Know your labor laws.



36

Go beyond the boring job ad.

Job Ad #1

Optician with or without experience needed for optometry office. Great benefits. Will train the right person. Apply today. Please do not apply if not punctual and reliable.

VS.

Job Ad #2

If the idea of working at a bilingual eyecare clinic and eyeglasses boutique makes you "muy excited," keep reading. If you have a passion for fashion and all things eyeballs and glasses, you've encountered your dream job. Stylist opticians help our patients discover the best frame style for them and their prescription. Optical experience is not required but is a plus. Schedule your interview today if you're ready to help our community see better, look great in their new specs, and learn new skills to propel your career in the process.

37

Go beyond the resume.



38



39

Hiring

- Hire the right people and put them in the right seat (work area).
- Pay them well, train them well, and keep them engaged.
- Empower & engage your staff with career development.



40

Consistency is Key



Everyone experiences the same process.

41

5 steps to successfully hire, train, and retain amazing staff in this new world

- Step 1: Application & Zoom link for interview (email-automated)
- Step 2: Scheduled behind-the-scenes tour
- Step 3: Four-hour paid coaching session (four-hour bootcamp)
- Step 4: Four-week implementation coaching (paid)
- Step 5: Discovery session

42

Step 1

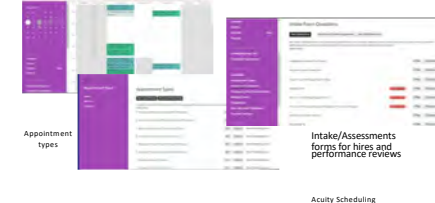
• Application & schedule Zoom interview (email-automated)



- Set it up and let the AI do the rest
- Templates and videos attached
- Email and text reminders for both you and candidates

43

Automation is key. Program sends automated email reminders.



Acuity Scheduling

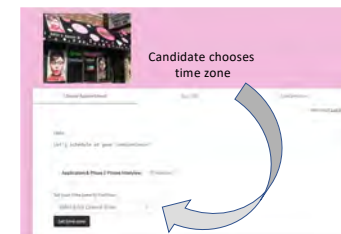
44

Candidate receives email



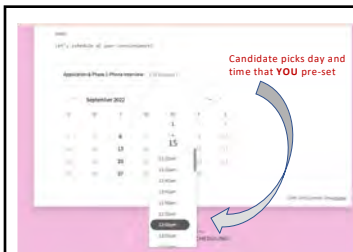
45

Candidate chooses time zone



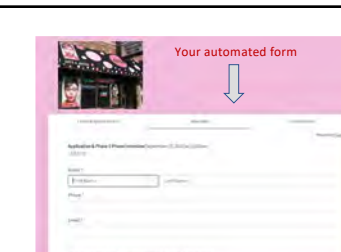
46

Candidate picks day and time that YOU pre-set



47

Your automated form



48

49

50

50

Free version does not have reminder emails
*Calendly

- 51

A woman with dark hair, wearing a bright red dress and red high-heeled shoes, is standing on a small, light blue rectangular box. She is looking towards the camera with a slight smile. The background is a plain, light-colored wall.

52

53

54

Step 5: Discovery Session

- What did they discover?
- What did you discover?
- Employment offer?



55

Personality testing

Putting the "right people" in the "right seat"



56

Retaining staff

Empower your staff

- **Training** (weekly or biweekly)
- Education-motivation-inspiration
- **Performance reviews** or check-ins (new 3+3+3, established 2x year)
- Level 10 Meetings
- **Employee engagement**



57

Training and career development



What if I train them
and they leave to
work for my
competitor?

58

I don't have time!

- Empower your staff and create leaders.



59

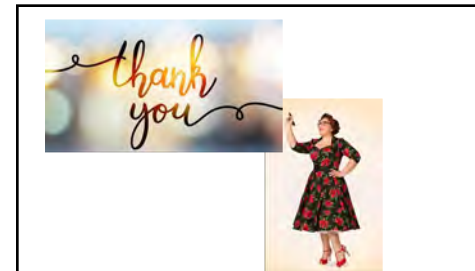
Business books



60



61



62

Where do I find this amazing staff?

- Word-of-mouth (regs, fam, & friends)
- Signage or job application box
- When seeing patients
- While shopping
- Offering bonus for current staff
- In the office (captured audience)
- Social media (share in local closed groups)

63

If time permits talk about:

- Labor lawsuit
- embezzled 2x
- Free courses and workshops

64