



Hiring, Training, and Motivating an Effective Optical Staff

Harriett Stein

Hiring, managing, motivating, and training personnel are challenges to all practices regardless of their size. Doctors report that ophthalmic personnel turnover is high nationwide, and the eyewear consultant is the hardest employee to find, keep, and train.

Finding and keeping the right employees are crucial to the success of an optical dispensary. You can lose as much as 30% of your optical income, or more, because of ineffective staff. Employees without patient interviewing and personalized service skills, lacking product knowledge, or who do not know how to treat patients are employees who don't know what to do. They are, therefore, unhappy in their positions, and it shows in their performance.

Well-trained employees know how to maximize patient satisfaction to ensure repeat business and stimulate new growth. They can also increase a patient's total optical purchases and ensure patients are happy and

satisfied with their eyewear selection. Your goal is to hear patients say, "Thank you. Nobody's ever given me this kind of service before."

The best way to entice and retain patients is by training the right staff. Staff is a big investment, with salaries running between 15 and 19.5% of a practice's gross receipts, and they must be cared for and nurtured like the investment they are. Developing a training system that can be used repeatedly to freshen the skills of your current staff and train new personnel is paramount to your success as administrator.

The Hiring Process

Hiring for a new optical venture begins with deciding how many people to employ. Pull 12 months of charts and find out how many prescription changes you have in a year, a month, and a week. Use those numbers to ascertain your staffing needs.

For example, say your practice uses a 4½-day week and a 50-week year. You have three doctors who perform 13,500 examinations a year, and 50% of those patients require refractive prescriptions. Using those figures, your optical dispensary must be staffed to assist 6,750 patients a year—135 a week, 32 a day. These are the patients that your doctor or ophthalmic technician will be escorting to the optical dispensary during the day for frame and lens selection.

In addition to helping these patients select eyewear and lenses, the optical staff will perform several tasks including dispensing eyewear, making adjustments, doing emergency repairs, answering the telephone, meeting with frame sales representatives, stocking and restocking the frame boards, and calling patients. If your practice will be sending 21 to 36 patients to the dispensary a day, consider hiring two

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eyewear consultants and an optician/manager, one of whom could work part-time in an in-house lab. If you plan on having an in-house lab, you'll need to hire one more person.

A successful optical person should be able to generate five to six times his or her salary in revenue. With a minimum number of distractions and interruptions, a full-time optician in a lab setting should be able to fabricate 20 to 30 jobs a day.

Once you know how many people to hire, create an accurate job description. List all the tasks to be performed and the character traits required. For example, an eyewear consultant should be stylish and confident. Making the list may seem overwhelming, but you can't look for the perfect individual until you understand what he or she will be doing.

When compiling your list, be specific. Your list of required traits might include accuracy, a person good with his or her hands, and someone who is service oriented and can educate patients about the products and services you offer. The successful candidate will be well groomed, a person who sees the positive in others, isn't stingy with compliments, and is flexible.

Think about what each trait on your list means. For example, does a high energy level mean a person who won't burn out by 7 p.m. on your late night or someone who can juggle four or five projects at once?

Hiring people with experience doesn't necessarily mean they have the expertise and knowledge you require. It only means they are familiar with the terminology. Many times, when you hire someone with optical or optometric experience, you also hire bad habits, such as prejudging how much a patient will spend. A fresh attitude can bring a fresh approach.

You may get many talented and enthusiastic applicants who have never worked in the health care or optical field. The key to attracting trainable, service-oriented applicants is to make the position and your office sound exciting. People looking for a career change read into classified advertisements what they want to read, and what they want is glamour, excitement, fun, and a challenge; for example, "Busy, professional, friendly office."

If you are hiring an optical manager to oversee both the business and management of the optical dispensary, make sure the applicant understands your expectations. The successful candidate will be charged with reporting optical growth. Be specific in your expectations so there are no surprises or disappointments on either side. Make it clear that there should be nothing that goes on that this person should not know about and understand.

Your job description should plainly state that the manager will be reporting the numbers on a weekly and monthly basis. These numbers should include how many patients are seen, the number of lenses sold by lens type (e.g., single vision, flat-top bifocal), how many frames are sold, and how many were sold as complete pairs.

Your optical manager should know what lens options are selling and how many. He or she should also know what percentage of jobs dispensed were done in your in-house lab and the practice's overhead costs. Your manager should set yearly goals and calculate monthly goals from that 12-month goal. To keep the optical dispensary on course, the manager must track daily receipts and know the practice's average patient optical fee. (The national average is \$200.)

The optical manager should also track what frames are selling on a



daily basis. If you don't know what you're selling, you don't know what to stock. Cost containment means tracking the turnover of each frame and eliminating look-alikes and frames that don't sell.

Balancing Know-How with Personality

Whether or not your state requires you to hire a licensed optician, you should look for someone with an

understanding of optics. But that's not all you want. Optical dispensaries are busy places with many things happening at once. Often, all at the same time, a patient comes in for a repair, another arrives to pick up glasses, and yet another walks in wanting to select a new frame. Thus, in addition to expertise in the optical field, your optician must be able to deal with stress and handle more than one task at a time.

I would rather hire someone with a great attitude rather than a person with a bad attitude and experience. Why? Because someone with a good attitude is willing to learn anything.

Now that you have a clear idea of the number of employees needed and job descriptions, you're ready to begin your personnel search. Consider these sources when seeking applicants:

- employment agencies
- optometric technician schools
- other optical dispensaries/competitors
- optical sales representatives
- classified ads.

Get the word out. Ask practices in neighboring towns to tell you when qualified people relocate to your area. The ideal candidate will probably be initially attracted to your office by an advertisement in a local paper. Make sure the classified ad reflects your practice philosophy and clearly states the job requirements. Here's an example of an effective advertisement:

Fashion Eyewear Consultant

Seeking a fashion-conscious, experienced optician/dispenser for a busy private ophthalmological office. This truly service-oriented, people-pleasing practice needs a confident and knowledgeable sales personality who knows the art of eyewear consulting or is willing to learn. Call 555-5555.

Effective Interviewing

During an interview, it's important to get past "pat" answers to real



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information. Have applicants verbally reconstruct their job history, reviewing what they liked and disliked about their former jobs and bosses. This is an effective way to detect behavioral patterns. Then, offer applicants an opportunity to evaluate their strengths and weaknesses by saying, "We all have areas in which we'd like to improve or change. What are some of yours?"

To help determine how the candidate will deal with multiple tasks, present the following scenario: "Everyone in your office is out to lunch; a patient walks through the door with a broken frame. Another patient is waiting to have her glasses dispensed, and the doctor brings you yet another patient for frame selection. How would you handle this situation?"

Information Is Power

Many doctors expect that—without training or direction—their staff will react and communicate exactly right all the time. The underlying issue is expectation. Take the case of a doctor who assumes the assistants know what is expected when in reality, they don't. This starts a cycle of inefficiency, ineffectiveness, and poor motivation and attitude on the part of the assistants. For the doctors, it brings on an acute case of "frustricity" (frustration sprinkled with anxiety).

Knowing a job well builds confidence and self-esteem. It also communicates the doctor's willingness to provide an opportunity for employees to succeed. Set as your goal three hours of training each month.

Your patients select to use your services 85% of the time based on communication skills and 15% on scientific, technical assessment. Patients are tuned to human relations skills—how they are treated by oth-

ers. Your optical dispensary will only be as good as your weakest staff member.

Training is also your secret weapon against burnout. Staff efficiency improves and productivity soars when the staff is on a regular training cycle. Plan a full year of training at a time, and schedule training 6 months in advance. You may not be comfortable acting as the trainer. It's your job to break the training into categories and put a timeline on each skill, not to conduct the actual training.

For example, communication skills, product knowledge, and quality control of prescription fabrication are all areas in which your staff may want or need training. Don't tackle all at one time. For instance, build communication skills by providing scripts that show a more effective way to communicate with patients; set a deadline for when you want the scripts to be in use. Then, delegate the responsibility to check and see whether the scripts are actually being used. For example, you may say, "In two to four weeks, I expect you to know all the scripts. The manager will sit with you, see how proficient you are, and give you a written score."

Here's a script for handling telephone shoppers:

Caller: How much are frames?

Assistant: Thank you for calling!

Are you a new patient to our office? Great—we're delighted you called. Are you having trouble with your present frame?

Caller: Yes, I *broke* mine.

Assistant: I understand how inconvenient that is. How old is your frame? When was your last eye exam? Our doctor recommends to our patients that they not use a prescription for more than two years as their eyes may change without obvious symp-

toms. We have a large selection of frames. Our least expensive frames are \$69. Our designer line starts at \$150. Our eyewear consultant, Debbie, can help you select the frames that are comfortable and look best on you. I can make an appointment for you to have your eyes examined and then have your new prescription put into a new frame. Would a morning or afternoon appointment be more convenient?

For certain topics, you may want to hire a professional trainer to conduct on-site, one-day sessions. The training can be customized to your practice, and your staff won't be distracted. This also eliminates travel and lodging costs, as well as the distractions, of an outside seminar or conference. Will the training pay for itself? Calculate how much revenue the changed behavior could add to your practice in a year versus the cost of the training. If the revenue exceeds the cost, you may want to explore this option.

Invite frame or optical lab representatives to give technical updates or introduce a new frame line to staff. A manager can conduct training on specific days of the month. Employees can be good teachers, too. For example, ask an employee who is proficient at selling multiple pairs of spectacles to conduct a workshop to share his or her techniques.

Here are some continuing education ideas:

- With staff input, develop an outline of topics you want to cover. Training sessions are more effective with three people or fewer.
- Have the entire staff visit another ophthalmic practice with an optical shop to gather ideas you can incorporate into your practice.

- Purchase audio and video training materials, and require staff to review and take written or oral tests on key skills.
- Keep a binder of articles clipped from trade journals. Articles should be organized by category, such as selling techniques, dealing with difficult people, record keeping, repair tips, and technology. This an excellent tool for seasoned staff and helps bring new staff members up to speed in key areas. Reviewing new and known ideas keeps motivation high and creative juices flowing.
- Enroll staff members in outside management and technical seminars. Always have them report on what they learned at the meeting or the one idea they would like integrated into the practice. Outside seminars act as a rejuvenator, stimulating staff.
- Videotape staff during role-playing training sessions and critique their performance. Seeing is believing, and your staff will quickly point out their own shortcomings.

The time and energy put into educating and challenging staff members will always reward the practice and your patients. The more you show an interest in your staff, the more interest they will show in their jobs.

The Bottom Line

The ultimate success of your venture into optical dispensing depends on finding, hiring, and keeping a motivated, educated staff with a good attitude and commitment to patient satisfaction. Involve staff in the training and management of your practice. Ask their advice; listen to their opinions. Your employees will support what they help create. æ

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