

Use Retreats to Plan Big Changes

This “time out” can re-energize your practice.

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One truism throughout my career is that a correlation does not always exist between the amount of work required to reach a goal and the size of the goal achieved. It seems that spending more time and exerting a greater effort when planning changes would assure bigger and better results; yet, some of our most significant achievements are accomplished in less time and with less effort than smaller ones. This is not to say that changes happen automatically. To achieve significant goals, we must have a well-thought-out master plan. It is a shame that we often miss big opportunities and accomplishments because we are bogged down in day-to-day small things, the struggles of “getting through” the typical busy day. Obviously, we have to deal with the day-to-day “busyness” of our practices, but we should make sure that we also take time to tackle the big goals.

Most of us recognize that there is a significant difference between being busy and being productive. I remember watching a basketball game in which one of the announcers kept making positive comments about the effort that one player was putting forth. Even though this player

had not scored a point, or retrieved a rebound, he did appear to be putting out major effort. Bill Walton, the co-announcer, was less impressed with this effort, remarking, “Don’t confuse effort with accomplishment.”

A business example that parallels this is that of the salesperson who complains to his boss that he is underpaid—supporting his request for a raise with the explanation that he

has confused effort with accomplishment. This argument of, “I am working harder and, therefore, should be paid more” is heard frequently in every business and is usually accompanied by numerous excuses for poor outcomes rather than attempts to discover why the actual accomplishments have been few.

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puts in more time and effort than his colleague in the adjacent cubicle who is much higher paid. He shows his boss phone logs, pointing out how he has made more than one hundred calls, while the higher paid salesperson has made only three. The statistic relevant to the boss, however, is that the “underpaid” salesperson has made only one sale whereas the “overpaid” one has made three. In this case, the “underpaid” employee

much as we could is that we seldom take the time to develop a “plan” for reaching our goals. Days pass quickly in a busy practice, and most decisions are directed at “putting out fires” and “getting through the day,” rather than planning ahead. Frequently, much of our work is even incomplete at the end of the day—necessitating that we use future planning time playing “catch up” instead.

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It is difficult to find time for setting long-term goals and developing the strategy for achieving them in this type of environment. One solution to this dilemma is to get away from of the routine office environment and devote a few uninterrupted days contemplating “the big issues.”

Many businesses set aside one weekend a year for a strategic planning retreat. Few medical practitioners, however, take this type of “time out”. In spite of concerns regarding the added cost of a retreat, or worrying that attendees will be “giving up a weekend,” this is a strategy worth adopting. A retreat is not the same as an office meeting, even if the meeting is off site. A retreat requires advance planning, and its significance is elevated when it is established as a priority, without overly skimping on cost. Sometimes it makes sense for attendees to be “doctors only”, with the intent of setting this time aside for the purpose of establishing goals and priorities. At other times (such as prior

ways to achieve this; however, a goal of increasing profit by 100% would require more creativity. This audacious goal would bring forth ideas that would not be generated if targeting the lesser one. There is no question that this type of brainstorming is

service and care) and increasing profitability (through both cost reduction and improved collections). If we had not held the retreat, we would still have spent the same money on technology and expended the same amount of time and energy installing

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best done in an atmosphere where no one is distracted by daily routine and everyone is encouraged to “think outside the box.” No initial ideas should be considered too radical. Once goals have been discussed and established at the retreat, a successful implementation is more likely upon return to the practice. This is because team members have already “bought into” the plan before leaving the retreat. They have been the ones instrumental in setting the goals and will be charged with their implementation.

and implementing it, but we would have only succeeded in achieving a “paperless practice”—with no improvement in either quality or profit.

At your next office meeting, suggest the idea of scheduling a retreat for the purpose of addressing the long-term goals of your practice. Make this a high priority, pick a date when most everyone can attend, seek ideas for a location, determine if you need assistance from an “outside subject expert,” and plan an event that everyone will look forward to. During the months leading up to the retreat, everyone will begin to think of ideas or issues s/he would like to discuss. It is okay to list these and have a structured agenda ahead of time, but leave much of the time at the actual retreat open for “brainstorming sessions” at which everyone will have a blank page in front of him/her with no preconceived point of view. Think big during your strategic planning retreat; this is the time to be outrageous and think the impossible—the key to achieving big accomplishments. If time is regularly set aside for this type of activity, you will find that your practice’s accomplishments will be “bigger and better” each year. **PM**

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to implementing projects aimed at major change which will require full commitment from both doctors and staff), attendance should include the entire staff, along with the doctors.

The retreat environment is conducive to generating ideas, setting goals, and solidifying relationships among those who will ultimately be charged with prioritizing and implementing the plan that will be developed. Participants can relax, take time to envision the type of practice they would like to have, and set a plan for achieving this goal. It is best to set the bar high, which forces people to think out of the box and actually achieve “bigger” accomplishments. For example, if the goal were to grow profit by 10%, there would be a number of relatively “easy”

The first formal retreat held by the partners of my former practice was established with the purpose of setting goals for a major “re-computerization” of our office contemplated for later in the year. The location we chose to meet at was a beach resort in California. The retreat included time for relaxing on the beach and social dinners in the evening, and we were still able to emerge at the end of the weekend with clear written goals for our project and a formal plan of implementation. Instead of simply setting the typical goals for computerization (such as “becoming paperless”), we were able to establish a number of broader objectives designed to achieve specific results—including employment of this new system for improving quality (of both



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