



Building a Thriving Practice: Start with a Written Action Plan!

Writing down your goals makes them harder to ignore or avoid.

BY LYNN HOMISAK, PRT

To Our Readers: There are no foolish questions. Chances are that if you have a question or concern in your practice, others are experiencing a similar situation. We're here to help. PM [doctor and staff] readers are encouraged to submit questions to soslynn@gmail.com which will be printed and answered in this column anonymously.

Dear Lynn,

I'll get right to the point. I want to turn my mediocre, five-year-old practice into a thriving one. Suddenly, we seem to be struggling with office flow, patient retention, and neglected policies, for example. How can I make that happen?

Hypothetically, there is as much a chance of you wanting to turn your practice into a thriving one as there is wanting to learn to play guitar like Eric Clapton—because conceivably, you

have the human capability of doing both. Only make no mistake. *Wanting* and *doing* are two different things.

For any goal, you need determination, skill, and attitude. The strength of these attributes will provide the power that can “make that happen.” Clapton

Success Starts with a “Can-Do” Mentality (and a Strategic Plan)

We all know that change is hard. Turns out, though, that creating a plan to help make those changes is the easiest and first step in reaching a targeted goal. Pair that with a

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fans may remember his song, “It’s in the Way That You Use It.” How true. Although the power to accomplish exists in us all, the key to success depends upon how we choose to apply it.

Putting aside the guitar player analogy, let’s stick to your query. What does it take to turn a “struggling” practice into a thriving one?

positive mindset and you’re on your way.

Of course, it’s necessary to define what professional success means to you before proceeding. Is it more financial stability? Power? Popularity? Happiness? Is it your goal to improve just one or two roadblocks with-

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in your practice or elevate the entire practice to a whole new level?

Once you define your goal, it's time to plan the work and work the plan. For starters, you'll need:

- 1) The initial willingness to accept new ideas and put them into writing,
- 2) The ability to create achievable steps that will guide you through,
- 3) The drive and fortitude to act on them,
- 4) The ongoing support of your team,



to keyboard), then walking away and waiting for the magic to happen. You may as well just sit back and hope or wish for a miracle. Good luck with that! Eleanor Roosevelt said, "It takes as much energy to wish as to plan,"

presence serves as a reminder to act. Like a "to-do" list. Write it. Do it. Cross it out. Accomplished!

Necessary Operational Protocols

Chances are, you've heard the phrase "necessary operational protocols" (NOP). But what are they, why would anyone need them, and how do they fit into an action plan?

Unlike a business strategy, which is essentially a long-term plan that focuses on market tactics, i.e., positioning and growth, NOPs apply to general management operations and everyday processes that (ideally) function efficiently.

In medical practices, those daily processes might involve patient relations and communication, financial health, claims processing and billing methods, technology, staff productivity and efficiency, hiring and training procedures, regulations and compliance, and medical services offered.

Every practice is familiar with these types of systems. However, the success of any practice is often not measured by the mere existence or familiarity of NOPs; rather, by how they are executed and managed. Remember? "It's in the way that you use it."

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The reason you want to put activities and goals into a written action plan is that it makes them harder to ignore or avoid.

5) The responsibility to stick with the plan, alter it where necessary

6) The celebration of your achievements.

Next, it is important to understand that putting your ideas into writing (see #1 above) doesn't mean just putting pen to paper (or fingers

so maybe take our former First Lady's advice and choose to use your energy more constructively!?

The reason you want to put activities and goals into a written action plan is that it makes them harder to ignore or avoid. They are more likely to be carried out because their visual

FIGURE 1

Action Plan Example

GOAL/PROBLEM:	ACTION PLAN:	OWNER:	TARGET:	REPORT BACK:
Date	What Steps Can Be Taken to Carry Out Your Goal?	Who Is Responsible?	Completion Date	Result and Follow-up Plan
A. We have had an increase in no-shows. (Today's date)	1) Verbally educate patients on no-show policy. Update it to include fees, no-shows, and cancellation guidelines. Have patients acknowledge by signature.	Nancy, front desk receptionist	Next monthly staff meeting	<ul style="list-style-type: none"> • Assess and describe task effectiveness • Conduct patient survey for feedback • Create new written policy to reflect changes
	2) Attach value to and reinforce the medical necessity of their visits before they leave the treatment room. Give them a reason to return.	Dr. Nicely		
	3) Schedule new and follow-up visits within a more reasonable amount of time to prevent patients from going elsewhere.	Lucinda, scheduler		
B. (next practice goal)	1)			
	2)			
	3)			
C. (next practice goal)	1)			
	2)			
	3)			

ASK THE CONSULTANT

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Unfortunately, if we've become too accustomed to do something one way for so long, it becomes difficult or scary to do it differently. So, good or bad, we stick to what we know, sometimes to our own detriment. Practices fixed in this type of self-induced stagnation are viewed as static, crippled, or frozen in time. None of which tilt towards progress.

Options for Improvement

You might consider taking one of these tactics.

The Practice Management Consultant Plan: Hiring a professional with management experience is one way to implement an improvement plan. An outsider's observation and analysis of your practice's current activities and protocols can help identify breakdowns and offer a purely diagnostic (non-emotional) perspective. A positive outcome will occur if the client team is on board with the proposed recommendations. If the client team is *not* willing to follow through or cooperate, it is right back to square one, with an unnecessary cost to boot!

The DIY Plan: Another option is to personally buckle down and commit to internally recognizing problem areas

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and "get 'er done" yourself. Simply put, pinpoint which of the NOPs listed above are currently working to your satisfaction, and which are not. Focusing on the latter would then become the foundation for a startup action plan.

Keep in mind that analyzing every system, procedure, or protocol all at once might be a great deal to swallow right off the bat, so my advice is to have patience. Take things one bite at a time by putting an overall list of concerns together and addressing just three of your most challenging. Then arrange those three in order of priority (or necessity) and prepare to tackle them one by one. It's the old "how do you eat an elephant" theory. Try it. It works.

Staff Advantage

You will absolutely want to involve your staff to help identify these troubling issues. Don't underestimate their input. Staff can offer valuable perspective that is often outside your visionary compass. Just because you are unable to see these issues as problematic doesn't mean they are not disrupting daily flow, efficiency, and productivity. Be open to your team's feedback.

As a former staff person myself, I can tell you that staff members WANT to play a role in practice growth and are more willing than you think to change for the good of the practice. Their involvement is crucial, and for

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them it's even motivating, personally and professionally. From the get-go, their enthusiasm becomes the key to swift implementation. If you are fortunate enough to have their cooperation and support as your secret sauce, the time is right to proceed, full steam ahead.

The Written Action Plan: See for Yourself

For those who are not quite sure how to successfully create a written action plan or understand how it works, figure 1 will provide a clearer picture.

In it, you will see a common practice dilemma (Problem A) along with three potential solutions for improve-

Putting a simple action plan in place will help guide you through the process and make it easier to reach your goal.

ment, an individual accountable for each task, and the outcome of their efforts.

By the designated target date, all assigned task "owners" are responsible for reporting their findings to the team, as well as the efficacy of the revised protocol, and what further action or follow-up is necessary. After said goal is achieved and adopted, an updated policy is written and implemented as the new protocol moving forward. When a successful outcome is reached, it calls for a celebratory team activity.

Do Action Plans Really Work?

No question about it. It is a black-and-white, step-by-step, follow-up approach to change. But don't take my word for it. It costs nothing to try it for yourself. Deciding to take that first step towards change is always the hardest decision to make; but remember, nothing changes if *you* don't change, and change is necessary to take a practice from mediocre to thriving.

By agreeing to take a new direction forward, you are consciously making the decision NOT to stay the same and NOT to go backwards. Don't overcomplicate things. Putting a simple action plan in place will help guide you through the process and make it easier to reach your goal. Onward and upwards. Act now, with purpose and power, and applaud the successful results. There's no time like the present. PM



Lynn Homisak, PRT, retired President of SOS Healthcare Management Solutions, carries a Certificate in Human Resource Studies from Cornell University School of Industry and Labor Relations. She is the 2010 recipient of *Podiatry Management's* Lifetime Achievement Award and was inducted into the *PM* Hall of Fame. She is also an Editorial Advisor for *Podiatry Management* magazine and is recognized nationwide as a speaker, writer, and expert in staff and human resource management.