

12

Insider Secrets from America's Top ODs

Advice to take you from a successful practice owner to a successful business owner.



Contributors



Alison Jensen



Dr. Maria Sampalis



Dr. Alan Glazier



Dr. Kim Castleberry



Dr. John McCormick



Dr. Matt Stanley



Dr. Shazeen Ali



Dr. Jeffrey Anshel



Dr. Ray Corbin-Simon

A Note to Our Readers

We could sit here and try to give you our own advice and secrets to help you run your practice and enhance your career, but we thought it would be even more valuable to curate advice from people who live and breathe optometry, and have real-life practice examples of what has worked and hasn't worked in their practice experiences. That's why we sat down and had some candid conversations with some of America's most successful optometrists to share with you the secrets that have led to their success.

These conversations cover a wide range of topics from practice growth hacking, advice for new grads, industry resources, and how you can maximize on practice technology. We hope you enjoy and learn from these conversations as much as we did!

A Glimpse of What's Ahead

Pursuing a Degree in Optometry Today	4
Advice for New Grads	5
How to Stay Current in the Industry	6
Managing Changes in Healthcare	7
Demystifying Corporate Optometry	8
Overcoming Challenges in the Practice	9
Maximizing Technology to Foster Growth	10
Practice Growth Hacking	12
Building and Maintaining a Strong Team	13
Eliminating Patient No Shows	14
Becoming an Industry Leader	15
Mentorship in Eyecare	16
Conclusion	17



Alison Jensen

on pursuing a degree in optometry today.

Student, OD Candidate
UC-Berkeley School of Optometry, Class of 2020

When and why did you decide to pursue a career in optometry?

I knew I wanted to pursue a career in healthcare when I was an undergrad, so I completed most of my science requirements there. But, I did veer off the traditional path and majored in French Literature. After graduation, I shadowed and worked with doctors of many different specialties, and decided that optometry was right for me when I got to see how much the doctors get to interact with patients of all ages and abilities. That's when I decided to finish the requirements and apply to optometry school.

What excites you the most about the future of optometry?

There are two things that come to mind first when I think about why I'm excited about the future. The first being that I'm excited to get involved in the legislative process of expanding our scope of practice to include the use of lasers to resolve common patient pathology. Second, I'm excited for the profession to engage in the digital world more and improve upon the existing online features in order to better manage patient care.

Where do you see yourself in 5 or 10 years?

In five years, I hope to be working in private practice while hopefully having enough time to contribute to my local Kiwanis Club. I also plan on being an active member of the AOA throughout my career. Further down the road I'd also like to organize medical mission trips abroad.



Dr. Maria Sampalis on advice for new grads.

OD, Sampalis Eyecare
Corporate Optometry Sublease at Sears
New England College of Optometry, Class of 2007

Walking away from graduation and into the working world is an exciting and nerve-racking time for many young professionals. What advice would you give to students just starting their career as an OD?

Don't doubt yourself into thinking that you can't do whatever you want to do. As long as you are passionate about your career, you can take it wherever you want to go. You're going to run into obstacles, but it's important to turn them into successes and learning experiences. There are so many opportunities in this industry for anyone who has the passion and courage to take advantage of them.

Whether you're looking to move your career towards private practice, education, or research - there are people and companies in the industry who want to help you succeed. Take advantage of practice management resources, companies, industry reps, and networking events to help you find the tools and connections you need to get started. The future of this industry is bright, regardless of any doom you may hear.



Don't doubt yourself. you can do whatever you want as long as you're passionate about it.





Dr. Alan Glazier

on staying current in the eyecare industry.

OD, Founder/CEO of Shady Grove Eye and Vision Care
Founder, ODs on Facebook, ODSonFB.com
Executive Digital Editor of EyetubeOD/Advanced Ocular Care Publications
New England College of Optometry, Class of 1993

What are your favorite CE and industry events to attend?

Industry events are such a great way to keep up with CE, network with peers, and meet with software and technology vendors to find the latest advancements that will improve your practice. My personal favorites are International Vision Expo, SECO, AOA's Optometry Meeting, The American Academy of Optometry, and Vision Source Exchange. Making the time to attend these shows has given me the tools and connections to truly elevate the success of my practice and my career.

How do you connect with your peers in the industry outside of events?

Having a go-to place to communicate with friends and peers in eyecare is a great benefit to this industry. ODs on Facebook is a closed group that allows ODs to interact with each other on a daily basis and receive valuable insights, opinions, answers, and laughs from other optometrists you maybe would never get a chance to interact with outside of the group. Not only is it a great resource for information, but you could also make a connection and build a relationship with a valuable business partner.



Dr. Kim Castleberry

on managing changes in the eyecare industry.

OD, CEO of Plano Eye Associates
University of Houston College of Optometry, Class of 1983

If you could change one thing in the industry what would it be?

For me, I'm someone who bores easily and thrives on change. And while the only constant in my 35 years of practice has been change, the information technology systems haven't kept pace with the change in our industry, and we lag far behind other industries. For example, I can easily order an iPhone and get notification tracking from the moment I order until it hits my front door, yet my patients can't get notifications of their eyeglasses in the lengthy lab process.

That being said, the scope of practice and technology advances have been nothing short of stunning bringing us to what I think is the golden age of practice for Optometrists.

How do you prepare your practice for the future?

Doing what I can to stay ahead of lagging changes by implementing an IT platform that is up to date with patient communications, notifications, government compliance, and most importantly, practice virtualization-delivering care electronically online.

“

The only thing constant in my 35 years of practice has been change.

”



Dr. Maria Sampalis

on demystifying corporate optometry.

What are a few stereotypes people have about corporate optometry that you want to clear up?

Where do I start? I think a lot of it boils down to people assuming the doctor has heavy constraints placed on them by the corporation. However, in my case, being self-employed and leasing space I'm able to build my clinical practice and business the way that I choose. Here are a few of the most common myths I hear:

Myth: Corporate ODs only refract.

Practicing the medical model will increase net income. If we only refracted it would be hard to sustain a generous income. I've been able to develop a great medical practice in my office and continue to grow it. Embracing the medical model is the way of the future for all of optometry.

Myth: Optical is only concerned with optical.

In my experience, at Sears Optical, I have developed a great relationship with the opticians. They want to help me grow my business because it helps them too. The opticians help recall patients and recommend my practice and medical expertise.

Myth: Corporate ODs only accept vision care plans.

My office accepts all insurance plans. I am able to practice the way I want and bill insurance without any constricting rules. There is a higher level of vision plans in a corporate setting because that is what the optical markets to, but my office is also able to market our medical eye care to also bring in those patients.





Dr. John McCormick

on overcoming challenges in your eyecare practice.

OD, McCormick Vision Source



Finding efficient solutions to manage the most challenging parts of my practice is what keeps me sane!



What challenges make your job as an optometrist harder than it needs to be?

For me personally, it's always been the insurance side of my business and keeping up with government regulations. The complexities of the insurance industry make it hard to keep up, and in healthcare heavy government regulations can be intimidating.

What strategies have you implemented to minimize the impact of these challenges?

Finding efficient ways to manage both of these aspects keeps me sane! For my insurance challenges, I've outsourced vision and medical claims and billing to a third-party revenue cycle management service. They file my claims, do the posting when money comes in, resubmit denials, advise me of miscoding, and follow up on slow pays. Even after I've gone home for the day, my claims are still being worked on each night. I've found that it's more cost effective for me to outsource the service than to have it done by employees in my office. They do a better job, and I don't have to worry about staff turnover and training if I lose my insurance person.

For all things regulatory: IRS to OSHA, I have hired a financial bookkeeper who is great at keeping my finances straight, money in the bank, bills paid, and books up to date. But to keep my day to day moving forward and managing employees I rely on a great general manager - that's something you need in-house!





Dr. Matt Stanley

on maximizing software technology to foster growth.

**OD, Owner of Eye Care Associates of Manhattan, P.A.
University of Missouri-St. Louis College of Opt., Class of 2006**

What role does technology play in your practice?

When I bought my practice, I knew one thing I wanted my practice to be was modern and high-tech. I wanted patients to be wowed, and my workflow to be more efficient because of the technology I was using. As a self-admitted tech geek, I also wanted to use technology to make optometry fun and exciting for myself and my staff.

Over the years we have invested in lots of tools and devices so that everything patient-facing is electronic and as modern as it can be. But, when it came time for me to chart patient exam findings, assessments, treatment plans, and interpretations and reports, and for my staff to import the data from all our instruments, we realized the technology of our practice management and EHR system was holding us back from being that modern practice we had set out to be.

How did you overcome these software challenges?

The system I was using early on was an in-house server based system that wasn't intuitive or easy to learn, and with lots of staff turnover, I needed a system that was easy to learn. On top of that, IT maintenance was a hassle every day, and I was wasting too much time just to chart a complete patient record. I knew it was time to at least look at my options for a system that could better suit my practice's needs.

A few things I knew I needed from a system was one with a more user-friendly experience for my staff, one that I could use on tablets to easily share information with patients and carry it around the office, a system built in the cloud so I could let go of the burden of IT maintenance, and ideally a solution that could be a one-stop software for my practice so I wouldn't have to purchase a bunch of integrations or add-ons.

Dr. Matt Stanley on maximizing software technology to foster growth.

How does cloud-based software technology make your practice more profitable?

With my server-based system, I was spending an extra 30 minutes a night, after seeing patients, backing up my data. Plus, when a software update was made I was spending my free time on the weekend updating all 14 computers in the office. Cloud-based software has saved me significant time and money that I was investing in an IT consultant, and I can easily access the system from home which was something that would have required a VPN and a secure remote desktop service with my old system.

In what ways is your practice management and EHR system helping your practice day in and day out today?

Making the switch from our server-based system to an all-inclusive, cloud-based system has increased my charting efficiency, my staff has a much easier time learning and taking advantage of the system's features, and I'm able to navigate the system easily without opening new tabs or clicking through multiple pages and windows. Because it's all-inclusive, the different parts of the software all talk to each other, from scheduling and insurance benefit retrieval, to check-in, to the exam documentation and coding, to optical and contact lenses, to checkout, to order placement, to insurance claim creation and filing, and finally, to ERA posting – it has minimized data entry tasks for everyone. To top it off, the system is visually appealing and fits the high-tech feel of our office.

Best of all, the time that the new system has saved me each day has allowed our practice to open up three more exam appointment slots each day. That was just an added bonus that I wasn't expecting I'd gain from making an electronic health record change.



[Learn More About My EHR System](#)



Dr. Shazeen Ali

on practice growth hacking.

OD, Ranch Road Vision Source
University of Houston College of Optometry, Class of 2013

What is your favorite practice growth hack?

As someone pretty new to private practice I really value networking and connecting with other established, successful doctors and bouncing around ideas with them to learn what has and hasn't worked well for them in terms of practice growth.

I think the thing that has moved the needle the most for my practice in terms of growth has been personally asking satisfied patients to review us on social media sites like Yelp, Google, or Facebook so that we can maintain a strong web presence. On top of the online reviews, encouraging them to send referrals our way is another great way to build our patient base. The value we place on peer-to-peer recommendations is extremely high.

What advice do you have for maintaining patients after you've seen them once?

I really pride myself and my entire practice on customer service. I work hard to provide a customized patient experience to ensure my patients don't just feel like a number. I want my patients to be educated on the services and products offered in my practice so they are comfortable with the purchase decisions they make. On the occasions when we have an unsatisfied patient we go above and beyond until they are taken care of so they walk away satisfied and ready to schedule their next appointment with us in the future.



I put myself in my patients' shoes to take care of them as I would like to be if I were in their place.





Dr. John McCormick on building and maintaining a strong team.

“ Hire slow, fire fast. A toxic personality, bad habits, or poor work ethic will affect others and your clinic negatively. ”

How do you build and retain the perfect team of employees?

It's really amazing how far a little appreciation can go. I take the golden rule very literally - "Do unto others as you would have them do unto you." So much in fact it's on the cover of our employee handbook. But, it isn't always obvious what the golden rule might imply, which is why there are another 43 pages in the employee handbook. It clears up behavior that is both acceptable and not acceptable. Things like respecting your fellow employees by being on time and not taking vacation at times of the year when everyone would like to be away. Building a successful team comes down to putting the right person in the right seat on the right bus to achieve effective collaboration.

How do you create a positive office culture that keeps your employees wanting to come to work every day?

Share the wealth. Pay well and pay fair. Find out what drives each person in your office. We are all unique and the thing that drives us and gives us a sense of accomplishment will vary from person to person. I know some ODs who do extensive personality testing to determine how to get the most horsepower and make each employee feel as happy in their work as they can.



Dr. Kim Castleberry on eliminating no shows in your practice.

How do you successfully reduce no shows in your practice?

I strive to have same-day appointment availability to serve my patients' point of need. For patients that want to book ahead of time, online scheduling and automated, timely preference-based notifications help keep no-shows to a minimum in my practice. Allowing patients to come in the day they have needs and to schedule appointments online after hours are the two solutions we use to keep no-shows out of our schedule.

Automated electronic recall that sends emails or text notifications based on patient preference helps save staff time from having to call all next day appointments. Being able to automate tasks like this gives my staff more time to focus on the patients actually in the office.

Dr. Jeffrey Anshel

on becoming a leader in the eyecare industry.



OD, FAAO, E Street Eyes
Principal of Corporate Vision Consulting
Illinois College of Optometry, Class of 1975

What do you know now that you wish you would have learned at the start of your career?

I spent my first two years out of school working in the Navy, so it took me a while to get used to private practice and the role of insurance companies guiding our patient treatments. We were instructed very well on how to treat a patient, but very little on how to get that patient into the office. Managing a practice is a moving target and there is no one right answer for every situation.

How did you get started with public speaking and education in the industry?

I've never been shy about speaking before a crowd, but when I realized how little eyecare providers know about nutrition for eye health I felt compelled to get the word out. I started the Ocular Nutrition Society to formalize nutrition education for eyecare professionals. I feel that we made quite the difference in teaching ODs the science of nutrition that affects eyecare and hopefully got them discussing it with their patients. This is more than just selling vitamins, it's a lifestyle discussion that can really help our patients with ocular health throughout their lifetime. If you recognize a need for something in the industry there are many opportunities to get involved and spread your voice throughout the industry.

“As I usually say, our optometric education starts when we leave school.”



Dr. Ray Corbin-Simon

on mentorship in eyecare.

OD, In Focus Vision Center & Eyecare
Secretary Treasurer, New Jersey Society of Optometric Physicians
Consultant, Power Practice
SUNY College of Optometry

How have mentors made an impact on your career as an optometrist?

Having mentors for various aspects of my career has been my best asset. Each one has provided me with a different perspective on managing situations and dealing with unexpected circumstances. Your colleagues and industry leaders are always willing to share their knowledge and provide guidance when necessary.

Best of all, be yourself. Explore the elements of your personality that drew you to the profession in the first place. Caring about our patients' visual needs and eye health is the hallmark of our profession. Embrace what you can contribute to your profession - our knowledge is ever-expanding.

How do you go about finding a mentor in this industry?

For me personally, I joined my state association and asked for a list of doctors who were available to assist me in a mentorship capacity. I was also able to maintain and utilize the relationships I had developed with clinical professors and administrators to help guide me on my postgraduate career choices. I also make a point to actively meet new colleagues at continuing education programs and maintaining those relationships after the events.

That's a Wrap!

Being a successful optometrist doesn't always automatically mean you're a successful business owner. There are so many sides to owning a practice outside of providing a high level of patient care. We hope these conversations helped give you the fuel and energy you need to start making bigger and better business decisions, and to build a happier team and productive workflow that gives your practice what it needs to bring in bigger profits.

For more information on software and services that can help fuel your practice growth, visit us at **StartYourUprise.com**.



Visit **StartYourUprise.com**