

# The 4 Essential Steps to Onboarding a New OD

Onboarding is often confused with orientation. For example, when a new optometrist joins a practice, they are usually shown the exam lane, break room, and restroom; they're introduced to staff; and they're also given a daily schedule. From there, they are delegated to the break room to fill out paperwork, or even handed a chart and pointed to their first patient.

This "sink or swim" and "learn as you go" approach works for some ODs, but it leaves many feeling lost, frustrated, and confused. We all spent a long time in school and most of us dreamed of the day we would be part of a practice team. A negative onboarding experience can lead to new hires not returning from lunch (I speak from experience) or looking for a new job as soon as they have a bit of free time.

## The importance of a well-thought-out onboarding process

Implementing a thorough onboarding process is essential. The benefits of a formal process include [better job performance and greater commitment](#) to the practice. Reduced stress and higher job satisfaction ultimately lead to better employee retention.

Onboarding helps fulfill the basic human need to belong. The drive to feel accepted and part of a group is what helps create loyalty. Companies that don't have an onboarding plan only have a [one-in-two chance of retaining an employee in the first 18 months](#).

That's why it's essential to have a clearly planned-out onboarding process.

## The four Cs of onboarding

In her publication, "[Onboarding New Employees: Maximizing Success](#)," Talya N. Bauer describes the essential aspects of every onboarding process. Structured onboarding has four distinct levels that are called the "Four Cs": Compliance, Clarification, Culture, and Connection.

- Compliance is the lowest level of the onboarding process and includes teaching employees basic [legal and policy-related rules and regulations](#) of your practice
- Clarification is ensuring that the doctor understands their responsibilities and related expectations, as well as that they have measurable ways to monitor their success and progress
- Culture is a broad category that encompasses the practice's mission, [values](#), vision of the future, and the way team members interact
- Connection is the vital interpersonal relationships and information networks that new employees must establish

The more Cs you include in your onboarding plan, the more successful it will be. The more the new doctor is engaged, the more they are incentivized to stick around.

## **Onboarding part 1: Compliance**

The Compliance phase should begin even before the new employee's first day. Your HR team should be communicating with the new doctor early and often. Before the first day, administrative tasks such as new hire paperwork, benefits package, creating accounts for access to EHR, and access to tutorials for any software should be sent. Frequent, friendly follow-ups to make sure all these tasks are complete will allow for a smoother first-day experience.

Pre-employment information could also include sending over a list of your office team with a photo and short bio and requesting that the new doctor send a photo and short bio that you can include on your website and social media to announce their arrival. This can help the new doctor learn staff

names and give them some talking points when they get a chance to chat with their new team. Knowing a little bit about their new team and even that you are posting their arrival on social media can go a long way towards making a new doctor feel like a part of the practice before they even walk in the door, fast-tracking the Connection phase.

## **Onboarding part 2: Clarification, Culture, Connection**

You never get a second chance to make a first impression and this is very true of your new doctor's first day. Their first-day experience can set the tone for their career with your practice, which could be very short if it gets off on the wrong foot. This is a great time to start to include elements of Clarification, Culture, and Connection. Each of these elements will combine to either increase or negatively impact your employee retention.

### **Clarification**

[Clarification of expectations and responsibilities](#) is key to promoting self-efficacy or self-confidence in job performance. Clarification also has a two-fold purpose. The first is communicating to the OD what performance factors you are going to be assessing to measure their success in the position, and how their performance will affect raises, promotions, or other opportunities for advancement in your organization. This includes details on the timing of reviews and how they can check on measurable vectors such as exam counts or the revenue they are generating for the practice.

The second half of clarification is defining the details of what they are responsible for. This is a more complex list than you would first think because it involves everything from who will be wiping down the slit lamp and phoropter between patients to how referrals are handled.

Before a new associate starts it would be helpful to take a day or two and detail everything that you handle. Think about your day and all the little

things you delegate and make a list of who the go-to people are. People show an increase in performance and increased self-efficacy and reliance if they feel they have a support system or safety net.

Examples of items we tend not to think about:

- Who do you go to when you run out of supplies like tissue or drops in your lane?
- Is there a system for ensuring that contact lens trials are reordered?
- Does the doctor write referrals or does the front staff handle that?
- Do you transition your patients to an optical associate or do you notate optical recommendations on your prescription?
- Who turns off the computer and shuts down the exam lane at the end of the day?

These questions may seem like small details that they can just ask as they go along. However, when you are new, it can be overwhelming and you may feel you are wasting time asking questions, especially in a busy office.

## **Culture**

Your company culture is, in essence, the personality of your company. A company's culture includes a variety of elements, including work environment, mission, values, ethics, and goals. Having a clear company culture keeps employees engaged and motivated. If you haven't previously thought about defining your company culture, the development of your onboarding program is a great time to light two candles with one flame.

Some items to consider while defining your company culture are:

- What is the general character of your company? Are you a high-end optical that's a little more reserved and refined, or are you a pediatric practice where everyone is light-hearted and playful?
- Do you have a specialty that you don't overtly advertise but are known

for, like hard-to-find frames or [dry eye treatment](#)?

- [What are you known for in the community?](#) Does your office [participate in specific charity events](#) or support community sports, the arts, or a certain school?
- What are the goals for your practice? These encompass things like consistent, outstanding customer service, growing or [starting a specialty like vision therapy](#), or even expanding to either a larger or second location.

You can share your company culture with your new doctor in a variety of ways, from a formal printout, power-point presentation, or downloaded PDF, to a monthly staff meeting where the mission and goals are reviewed regularly so everyone can share their ideas on ways to expand or update the current objectives.

## Connection

Make sure the entire staff knows the new doctor is arriving. Nothing can make you feel more unwelcome than arriving at a practice and having the receptionist not know who you are and that you are starting that day. This instantly sets a negative tone for what should be an exciting and happy day for both the staff and the new doctor.

Have a welcome package waiting for them, either at the front desk or that you give them as you greet them.

The welcome package can include a wide variety of items:

- A card signed by the staff to welcome them to the practice
- A white coat with the practice name and their name or a name tag
- Business cards with their name
- A list of frame brands and lens options available in your dispensary so they don't feel clueless when patients ask questions about those items
- A map of the area with the staff's favorite coffee shops, restaurants,

and places to run errands

- A light snack and a bottle of water

Some consultants caution “investing” in items like name tags and business cards before the new doctor’s trial period is up. By making him or her wait for these tokens of belonging, you are sending the message that you aren’t sure if you made the right decision to hire them and almost expect them to fail. Humans are hard-wired for connection and these small items (which really only cost \$30-50) can go a long way towards making a new doctor feel like you have confidence that they will be an important member of the practice.

It also is a great idea to set the new doctor up with a buddy. If there are no other ODs available, then try and pair them with an employee who is very knowledgeable about a wide range of aspects of your practice or even just the office social butterfly who knows who would have the answer to any questions that pop up. In addition to social integration into your practice, also try and have a system for any coaching that the new doctor may need. Even a seasoned OD will have questions and they will have ideas that can help the practice achieve its goals.

## It’s important to be proactive throughout the onboarding process

Bauer, in her book, also outlines three strategy levels and which of the Cs they entail.

Onboarding Strategy Level	Compliance	Clarification	Culture	Connection
1 Passive	YES	SOME	LITTLE/NONE	LITTLE/NONE
2 High Potential	YES	YES	YES	YES
3 Proactive	YES	YES	YES	YES

These strategy levels relate to each stage of the onboarding process in some way. Are you taking passive steps to onboard your new employee? Or

are you putting in the utmost effort to ensure that your new employee is comfortable and excited about their new job?

It's crucial to do more than the bare minimum. Be proactive rather than passive to ensure [higher employee retention](#) and satisfaction.

## **Create a structure for your new optometrist's onboarding**

You need to develop a hiring and onboarding program that works best for your practice. Many practices use 30, 60 and 90-day milestones. These milestone dates are great ways to continue Clarification by giving the doctor feedback on their strengths and challenges. These are also important times to expand on Culture and Connection by giving the doctor an opportunity to share their observations and to try to incorporate some of their ideas so they feel like they are part of the practice's Culture.

It is important to remember that unlike an orientation, onboarding is an ongoing process and it is a marathon, not a sprint. Find what works best with not only your practice, but each individual. The time and energy you invest in your onboarding program will be rewarded with happy, loyal doctors who help your practice grow and thrive.