

Getting Organized

“For every minute spent organizing, an hour is earned.” ~ Benjamin Franklin

Organization—oh, how many of us hate that word! Organization is not only important for your practice but for your life. Making lists is certainly part of getting organized, but if you’re constantly making lists but not completing the tasks, that’s what people call procrastination.

However, people will find time and energy to do the things they love. So, it’s not procrastination when you put things off, it is just a lack of passion. So, how do you get passionate about doing your charts, having that tough talk with your staff, writing up your systems and protocols, or even cleaning out your garage?

The answer is, you really don’t get passionate, but you just tackle it using the slight edge method.

When it comes to tasks like writing your protocols, you can delegate, and/or just do a little bit every day. When it comes to tasks like having that talk with a key staff member, you plan it and then do it immediately. Get it off your chest and your mind. You simply Eat the Frog. In Brian Tracy’s book of the same name, he talks about the task that you continuously put off as the frog. You just eat it. Do it the first thing in the morning, and then the rest of the day will be great.

To allow new ideas to flow, you have to remove the clutter from your life. And you can’t focus on everything at the same time. So you must prioritize.

Whenever you have a task to accomplish you can:

- 1) Delegate
- 2) Automate
- 3) Eliminate
- 4) Formulate

One of my problems is that I want to get everything done, and I want to get it done *now*. I can sometimes accelerate the pace by hiring people or delegating tasks. But at other times I need to slow down and think about the *one thing* that needs to be done that—if I completed it—most of the other things would fall in place.

Let's look at the first thing every single practice must do and should do immediately. That is to have every single process and system written down. This is your operations manual. This process can take some time if you have been in practice for awhile. In this case, you can simply delegate this task to a key person in each department. The patient care coordinator can write out her protocols and systems that she follows on a daily basis. The same goes for the key medical assistant, the marketing person, and the financial staff. I would still have a billing liaison if you do your billing offsite. This person can write up the process that she uses and she can also learn all the process the billing company uses in order to get paid properly.

Once these processes are all written out, you can then see which ones can be automated. Meaning you do it once, and you don't have to do it again. That being said, you still need to keep an eye on the automation in order to make sure the technology is still working for you. An example of this would be to automate your patients' reminders, automate your emails to new patients asking for referrals, and even automate your marketing campaigns.

Now, not everything on your to do list is important. In matter of fact, you will probably realize you can just eliminate this task or if you think it is great idea, but you don't have the time, or the staff, and if you think it is not the most important thing you need to do right now, just put it on the back burner. Have a book of ideas. Put that idea in the book and every quarter go

through them and see if it something important enough to get done now. Ask yourself the question, “Will this idea help me move the needle faster?”



As your office grows, organizing its departments becomes increasingly vital to your success. The above diagram is really what you need to solve any problem and to increase the office’s organization and efficiency. Almost every single issue that your practice is having is in one of these areas.

By using this diagram in conjunction with your numbers, you can easily fix the leak in your company. If you see your new patients are decreasing, then go through your marketing. Where are the patients coming from and in which area, or pillar, do you see a decrease?

This is a great tool to improve your practice because you can see briefly which areas are excelling and which need to improve. When your office is organized, you provide your staff a stress-free working environment. Further, you give yourself a blueprint for successful growth.

It would be a huge mistake to grow your organization without organization. Adding additional offices or staff to an already chaotic scene is a recipe for disaster. Even if your staff is well trained, your practice can still be disorganized. Things only work well when your staff operates as a team and communicate properly with one another. I'm sure you've experienced busy times where one staff member tries to be a superhuman but fails to communicate with his or her co-workers. They want to believe they're indispensable and can do it all. However, the end result is that they're all over the place and everyone's running behind. If this kind of thing happens in your practice, address it during a staff meeting.

In a medical practice, there are so many areas that need to be addressed. Using the following communication systems can be very helpful to make sure things get done promptly. What you should know is the number one reason why any business goes out of business is due to not delivering on your promises. When it comes to giving the patients what they need, you must constantly focus on the speed of delivery. These systems will help you achieve just that.

- **Triages:** This should be part of your EHR system. Any messages regarding patient care should be sent to you by triage. Your EHR should be set up to tell you if the patient is requesting a refill on a medication. In addition, you should make every effort for your patient to use the patient portal system to retrieve their lab results, your notes, or to make a request.

- **Intra-office email:** In my office we use an app called Slack which allows us to message other staff members. We can also set up groups, like the medical assistant group, or the front desk group. If you have a message that pertains to multiple people, you send one message and everyone in that group receives it.
- **Requisition Form:** You also need a system for your staff to issue requests. You can create a form where they write down their request, the situation, and the solution. For example:

Request: I need to take next Wednesday off to take my grandmother to the doctor.

Situation: The doctor is only available during this specific time.

Solution: I spoke with Mary and she will cover for me.

What does this accomplish? It shows that the staff member is taking responsibility for her job and has arranged for her own coverage—not you or the office manager. Both she and the person who’s covering for her both sign and the date the form, and the office manager signs off on it.

This will prevent being interrupted during the day when you are working with a patient.

To be efficient and increase productivity, you need organizational systems that help you clear your mind—something you can easily follow that prevents you from forgetting anything important. What system do you have for ordering lab work, orthotics, and shoes? How do you know if the lab has received your request or lost your prescription?

- **Order Status:** This is an excel spreadsheet to track everything you order. You can have a tab for orthotics, one for blood work, one for radiology testing such as MRIs and CT scans, and one for shoes. Every time you order any of these items, your staff will track it. They’ll record the order date, the patient’s name, and the item ordered. When the order

arrives, the front desk person will open the spreadsheet and record the item's arrival. Store the spreadsheet on your server, so everyone in the office can access it.

Twice a week someone should check the spreadsheet to see which items have arrived and which have not. If there are any delays, your staff should call the lab to find out why. Then—and this where you differentiate your business from everyone else's—you call the patient and explain why the product or test results are delayed and let them know that you're on top of this. That, my friend, is *Wow!* service. To be the best, you must do what others won't.

The purpose of being organized is to make sure you have a well-run, smoothly oiled machine—a practice in which everyone knows what to do and how to do it; a staff that communicates and works well together. You can only accomplish this if all your systems and protocols are written down. This is your office manual, the bible your staff will check when they aren't sure what to do when you're not around. The goal is to have your office function in an optimum fashion even when you're not there.