



VISITATION RIGHTS—GETTING THE MOST OUT OF AN ONSITE VISIT TO A COLLEAGUE’S PRACTICE

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While there are many ways to obtain the professional information proactive administrators need to be successful—ASOA Eyemail, industry meetings, professional organizations, vendors, the Internet, blogs—sometimes the best way to learn is to see something with your own eyes. When talking or reading about an important “best-practice” topic just isn’t enough, it might be time to pay an onsite visit to a colleague’s practice.

CASE STUDY

Sitting comfortably at a quiet table in an open-air resort lobby, two longtime friends and colleagues are busy catching up, sharing stories about everything from their practices to their families. Both experienced administrators at large ophthalmic practices—unfortunately on opposite coasts—they see each other infrequently, usually only at national meetings such as this. At one point, the conversation turns to a discussion about purchasing a new

patient tracking system. “At the moment, I’m a bit overwhelmed by the project,” one administrator admits. “I’m excited, but a little apprehensive. It’s a major undertaking and I want to get it right.” Without hesitation, her colleague offers assistance. “We implemented the same system you are considering last year. Please come visit our facility and see it in action. My team and I would be delighted to host you.”

THE SUCCESSFUL ONSITE VISIT

Visiting a colleague’s practice to evaluate or observe a product, program, service, or process requires a great deal of preparation to ensure the call is worthwhile and productive. Because a visit is a collaborative effort, all parties need clarity around its purpose and expectations. Follow these suggestions to get the most out of your visit to a colleague’s practice:

BEFORE YOUR VISIT

Do your research. Your goal is to make your visit as efficient as possible.

The last thing you want to do is waste anyone’s time. It is important to learn as much as you can about the subject beforehand. Do your homework. Conduct the requisite research. You don’t want to spend valuable onsite time getting up to speed. You need to be organized and ready the moment your visit starts.

Contact vendors. Scheduling a vendor demonstration—or multiple demonstrations if you are still evaluating several products—is a valuable way to prepare for a subsequent onsite visit to a colleague’s practice. Some vendors will help pay for onsite visits to practices already using their product.

Prepare a list of questions. Use your research to compile a list of questions and send them to your colleague ahead of time. This will help them prepare and be ready for you. They might even be able to answer some of your questions beforehand, thus saving valuable onsite time for other, more complex questions and/or demonstrations.

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Create an itinerary. Work with your colleague to develop a detailed itinerary. Together, you can identify the people you will need and when you will need them. You don’t want to unnecessarily “blow up” people’s days. Remember, you will be there on a workday. Everyone is busy and your colleague has a practice to run.

Verify if you can take photos/videos. Today’s modern phones and cameras make it simple to record important aspects of your visit. Ask upfront if your colleague has any objections to you using these technologies to help you remember important visit/demonstration details. Combining photos and videos with written notes will ensure you have captured all important details.

Ask upfront for related resources. Ask your colleague for any visit-related tools, forms, plans, and materials (e.g., samples of action plans, staff training, and patient education) they use that they might be willing to share upfront to help you prepare.

Be rested and ready. Make sure your travel itinerary meets the visit timeframe and schedule. You want to be fresh and energetic when the visit starts. Get a good night’s sleep and eat well. Bring a favorite snack to make sure you can maintain your energy level throughout the visit.

DURING YOUR VISIT

Put your preparation to work. Once all the introductory pleasantries are completed, the preplanning and itinerary should be able to kick in and the day should begin to flow. Of course, there could be unexpected issues—remember, this is a regular workday—but

good prep work should be able to overcome most ordinary office challenges.

Cop a (good) attitude. Be as respectful and unobtrusive as possible. Show gratitude early and often. Be pleasant, uplifting, and grateful. Go with the flow, but always be aware of the time and the itinerary. You want to maximize your learning and what you accomplish. Be cognizant of discussions or issues that take the visit off course and try hard to keep the visit focused and on track.

Take good notes. Detailed note taking is essential if you want to ultimately make a sound business decision. However, don’t overdo your scribing. There is a delicate balance. While you want to capture significant information, you don’t want to have your head down scribbling notes and miss hearing or seeing something even more important or interesting. Also, good note taking will help ensure you don’t have to interrupt your hosts with questions after you return.

Respect everyone’s time and job obligations. The good news here is that you, too, run a practice. You know what goes on behind the walls and in the lanes. You are intimately aware of how a practice works. You don’t want to mangle a tech’s day—or anyone’s day—and you likely won’t because of your preplanning efforts, respectful attitude, and professional insight.

Share information. You might be able to bring something to the table, despite being the visitor. Your hosts might be able to learn from you. Feel free to add your knowledge and experience when appropriate, while being careful not to derail the day’s agenda.

Buy lunch/dinner. Hosting a meal for the major players who spent time with you or went out of their way for you is the right thing to do. If your visit is a full-day affair (i.e., two meals with your hosts), offer to cover the more expensive meal break or the one most participants can attend. This is a great time to relax, socialize, and enjoy each other’s company.

AFTER YOUR VISIT

Show your appreciation. Send handwritten thank-you notes to everyone involved. Make a personal phone call. Send a gift basket with a note of appreciation. This is all part of building an ongoing, mutually beneficial professional relationship.

Provide updates. Let your hosts know how you used the information you gleaned during the visit and what you decided to do. They are vested in your outcome. Be quick to share anything you have learned since the visit.

Reciprocate. Make sure your hosts understand they are welcome to visit your practice anytime. Also, if you noticed anything that the host practice could use (perhaps a tool or form you have found) or if anyone asked you about a different topic/form, promptly send it.

SIMILAR CHALLENGES

Most top-performing practices share similar challenges. While you may think your practice is unique, chances are that known and respected colleagues understand your dilemma and would be delighted share their knowledge and insight during an onsite visit to their practice. All you have to do is ask. **AE**



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