

OAo THRIVE AND SURVIVE NEW OPTOMETRIST EVENT COURSE DESCRIPTIONS AND OBJECTIVES June 4, 2017

Financial Statements (1 hr. Category A)

Presenter/Speaker: Shadae Hassan

An interactive presentation on financial statements. After completing this session with Shadae Hassan, one of Scotiabank's top Advisors for Small Business Development, you will know how to read and understand business financials in your practice.

Implementing the Delegation Model in Your Practice (2 hrs. Category B)

Presenter/Speaker: Dr. Shaun Golemba

Are you having trouble attracting an associate to your practice? Are you having trouble keeping up with patient demand? Are you looking for an exit strategy? Are you having trouble finding time to work *on* your practice rather than *in* your practice? If you are one of these four doctors, the delegation model may be right for you.

Learning Objectives / Outcomes:

1. Identify the Delegation Model as a viable method of keeping up with high demand.
2. Identify how to implement the Delegation Model in a private Optometry practice.
3. Understand the financial impacts of the Delegation Model in a private Optometry practice.

Course Outline:

Part A: Benefits of having a scribe

- Efficiency of having a cluster of 2-4 rooms.
- Benefits of maintaining eye contact.
- More thorough recording.
- More efficient introductions to contact lenses.
- Protecting yourself.
- Extra hands.

Part B: Working *on* your practice

- From startup to growth to plateau – the practice life cycle.
- Benchmarking.
- New growth opportunities: AMD, Dry Eye, VT, Low Vision.
- Wildly Important Goals.

Part C: Exit Strategies

- Associates
- Partnerships
- CEO Model

Part D: Staff Costs

- Investing in Staff.
- *Real* Net Income vs *Optometry* Net Income

Part E: Choosing the right model.

- Super Tech Model
- Separate Optometric Assistant / Eyewear Consultant Model
- Separate Optometric Assistant / Scribe / Eyewear Consultant Model

Part F: Implementation

- Meet with your Team
- Training
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Setting yourself up for Success 'Making yourself a valuable asset' (1 hr. Category A)

Presenter/Speaker: Dr. Wes McCann

Entering the practicing world of Optometry is challenging and rewarding. Whether your ambitions lead you towards partnership or associateship, you need to set yourself up to be successful in any practice setting. How do you lay a foundation that will lead to a partnership? How do you make the most of being an associate? Learn how to be successful in private practice.

Evaluating a Practice to Purchase 'Where do I start?' 'What do I need?' (1 hr. Category A)

Presenter/Speaker: Dr. Wes McCann

Purchasing a practice can be challenging. What information do I need? What is a practice worth? What are the next steps?? These are all questions that will go through your mind when evaluating a practice for purchase. Learn how to appropriately appraise, vet and understand what you are getting yourself into.

How to get a formal independent professional Appraisal /Evaluation of your optometry practice. What do I do? (1 hr. Category A)

Presenter/Speaker: Jackie Joachim

ROI Corp is one of OAO's Benefit Partners, Jackie is their Chief Operating Officer. Segueing from Dr. McCann's session, learn *what* the process is and *what to do* to complete your formal independent practice evaluation.

The Inner Game of Work and Life (1 hr. Category A)

Presenter/Speaker: Dr. Kristen Bentley, Whole-Life Leadership Coach

The Neuroscience of stress, happiness and success. Maintaining a healthy and happy work life balance with a growing family and thriving practice can have its challenges. An optometrist herself, Dr. Bentley will share her passion, and the keys to successfully mastering this delicate balance in today's complex, competitive and dynamic business environment.