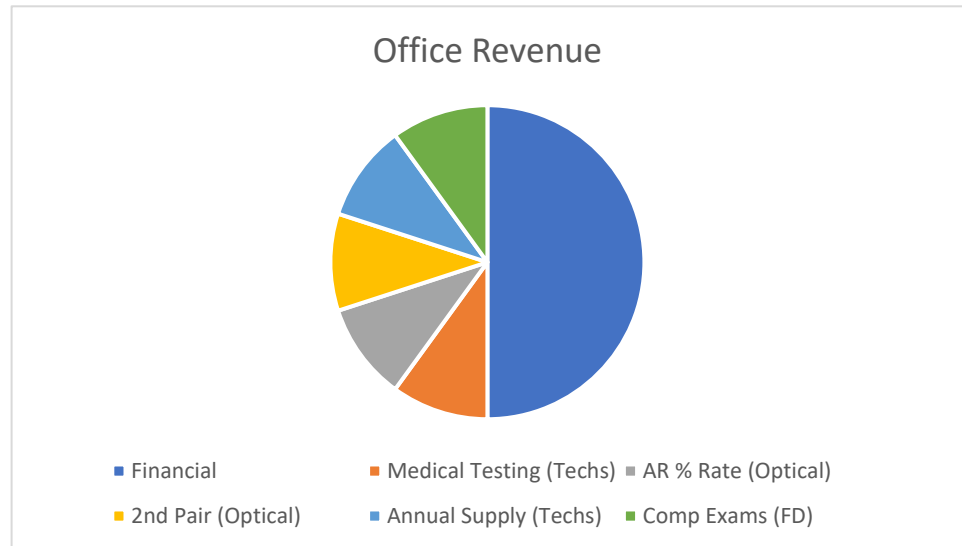


# Office Goal Setting

We often find that goals are too complicated, or staff is completely unsure of what metrics were used to create them. We refer to these as the “SURPRISE” bonus. This defeats the purpose of teaching staff the fundamentals of business with the objective of creating a more invested employee who understands how their performance directly



affects the bottom line. The goal is broken down into two parts so that staff has an opportunity to achieve it in both categories. The overall office financial goal (let’s say 50K) for the month. Then each dept will have a goal to meet. We can make these specific to whatever the office is struggling with. Clearly the department goals should be measurable; something that staff has direct control over and is revenue driven. (See ideas chart above)

Each part of the goal will represent a dollar amount toward the employee’s bonus. Example: If the office makes the overall collection monetary goal of 50K then each employee will earn an additional \$1 for every hour they have worked in that month. This allows part-time employees to be compensated fairly for their contribution, but clearly full-time staff will have higher returns. (Paying bonus for call-in /vacation hours is at your discretion, but again calling in puts stress on remaining staff and this is one way to curb that trend)

The other half of the bonus is based on the departments goals. All three department goals must be met to get this half. While each team will work together in their area to build their numbers,... ultimately the office is a TEAM that is working together! Everyone answers the phone warmly, everyone has an opportunity to let patients know we offer Optos imaging, or that we offer free shipping on annual supplies of contacts, etc. If the department goals are met, an additional \$1 can be earned for every hour worked during the month.

## TIPS FOR SUCCESS:

**Monthly goals-** Break the goal into weekly numbers. Employees can have short term memory loss – TikTok videos are 60 seconds!

**Weekly Meetings-** Each department will report their number at the weekly meeting. The manager will report the office collection number. Meetings should focus on brainstorming ways to get number up or strategies that made departments successful.

\*Goals really shouldn’t change. The idea is to get staff SO good at offering this service that it becomes part of our culture. They need to be easy to understand with a clear path to obtain.