

GETTING STARTED WITH WAL-MART / SAM'S DOCTOR MEETINGS

Purpose, History and Structure

Dr. Melonie Clemmons, Store 1070, East Ellijay, GA

Purpose:

Our purpose is to increase communication between lease-holding doctors and the Wal-Mart home office, regional managers and district managers. Furthermore, we want to share knowledge that will help our businesses grow and to resolve "opportunities." Our goals are to stay positive, be productive and become more profitable. We have made this our motto and we list these goals on all of our email, fax, and agenda correspondence. It is known as the "3 P's."

History:

In 2002, I attended Wal-Mart's year-beginning meeting in Kansas City. I had just finished a difficult first year with Wal-Mart and was wondering whether I would stay with the company. I became very encouraged at the meeting because I met several colleagues who were eager to share business plans, promotion ideas and tips for success. I also learned a lot about the home office in regards to their policies and their support system. Although I had several years of optometry experience, I was new to Wal-Mart and their way of doing things. I can remember leaving the meeting and thinking how much easier (and profitable) my first year would have been if I had met all of these great docs and Wal-Mart folks earlier.

Based on this experience, it was obvious how important it was to increase communication between colleagues and between the optometrists and the Wal-Mart folks in order to make our practices more productive and profitable. With the support of Pauline Tureman (Director of Professional Relations before Dr. Travis) and my district manager, I arranged our first meeting at a local Ryan's Steak House. In their small banquet room, we had eight doctors and seven Wal-Mart home office and field managers. Over the last two years, our total number of attending doctors and Wal-Mart managers has grown to approximately 50!

Structure:

We keep things consistent, simple and straightforward. We, the doctors, plan and facilitate the meetings. There are no fancy titles (i.e. President, Vice-President, etc.) and any titles we do have were established to create an organized system as we continue to grow. Our meeting format also allows us to share the responsibilities of leadership.

We have an average of one meeting per quarter. All of the doctors in our area of six districts are invited to the meeting. Also invited are our district managers, our regional manager and various guests from the home office. We also try to include Div. I store managers and Div. I district managers on occasion. Once per year, we have a closed meeting (lease-holding doctors only) and that meeting usually features an approved 1 hour continuing education course. The closed meeting allows us to discuss as a group how doctors perceive the meetings are progressing and if we need to make changes in our format (we pass out a survey at this meeting). It also gives doctors a forum to discuss opportunities they may be facing, particularly if they feel uncomfortable doing so in front of a district or regional manager. Wal-Mart management is informed of when we schedule our closed meeting and a summary is sent to them afterwards. Some groups feature a 1 hour continuing education class at every meeting but, since it cuts into our discussion time, we opt to only have CE at one to two of our meetings per year.

Our leadership format includes a facilitator team of three doctors who share the responsibilities of organizing the meetings and representing the group with the home office. We have a chief facilitator and two co-facilitators. No major decisions are made without all three of the facilitators being in agreement. This creates a system of checks and balances and insures that the facilitators appropriately represent the entire group. The facilitators communicate via email and phone conversations and we usually have 1-2 conference calls before every meeting. One of our DM's has also allowed us to use his Wal-Mart conference call privileges.

As opportunities surface, we appoint committees of three doctors (one leader and two helpers) to address these issues. If it is a small project, one person may take responsibility for the task instead of three. Each committee works on their task and reports to the entire group at the next meeting. For example, we currently have a committee working on a plan to help doctors who have suffered an unexpected but temporary injury or illness. The plan will have doctors from our group volunteer to help a disabled colleague at no cost. We have enough participants now so that if each doctor volunteered only 1-2 days, a disabled doctor could be covered virtually full time for a 6-week period. We have another committee that is working on legal issues for our area. One of the benefits of these committees is a reduction in work load for the facilitators. Another is that it gets more doctors involved in group leadership.

One achievement of our group is the development of DM conference calls. Doctors in each district have a conference call with their DM once per month. To keep things simple and consistent, we schedule the call on the same day each month. My district has our conference call on the first Thursday of the month, 9:15 - 10:00. We follow the same format as our doctor meetings; we make announcements, share tips for success and then discuss any opportunities in our stores. The calls also offer the DM a format to share updates on Wal-Mart happenings and sales numbers for our district.

In conclusion, we are very lucky in our Atlanta group. The doctors in our area have been very positive and are very eager to grow their practices. All have been supportive and helpful and we plain have fun together. I wish you all the best in starting this type of meeting in your area. **If I can help you in any way, I'm at store 1070 and my email is melonieclemmons@yahoo.com.**

Keeping Things Organized, Keeping Doctors Informed Dr. Larry Brown, Store 615, Cartersville, GA

Communication of Meeting Information:

My job with our doctor group is to keep things organized and inform the doctors about the meetings and communications with the home office. To get information to the doctors, we use email, FAX and personal phone calls. Email is the easiest and most advanced method of communication and 88 out of 95 of our doctors have email access. Email is excellent for quick updates on the activities of the group and it's easy to program a home email system to send messages to large numbers of doctors with only a few keystrokes. One tip is to assign a volunteer from your group who may be comfortable with computers to manage the address data and send emails to the doctors. The challenge of using email is that not all doctors check their emails regularly (I'd put it at about 40-50%). If you have a high percentage of doctors that respond to email, you might use www.evite.com.

Using FAX messages is more reliable with a better response rate than email. We keep our FAX messages to one page with a title in big, bold letters, "DELIVER TO YOUR VISION CENTER DOCTOR IMMEDIATELY." We started out by using a regular FAX machine to send out messages. When our group got much larger, we signed up for a web-based FAX service called MyFAX. For \$10 per month, we can send out 100 FAXes. If we go over that amount, there is a charge of .10c per FAX. This saves lots of time and is very inexpensive. One tip is to send the FAX messages on Friday afternoon or evening. Most doctors will be in their vision centers on Saturday morning.

The most common message we send to doctors is an invitation to a meeting. Too often, doctors will not RSVP to an email message or a followup FAX (usually around 40%). Therefore, we must frequently make phone calls. A tip might be to split up the phone call duties between two volunteer doctors or, once again, ask your staff to help out.

The Birmingham group, directed by Dr's Frank LaRussa, Kevin Neal and Bonnie Mallard, has created a website (www.alowal.com) as an additional tool for communication and it works well for them.

Other Tools of Communication:

At our meetings, we hand out a pre-assembled manila folder containing the meeting agenda, an updated list of area doctors, an updated list of Wal-Mart contacts and information from the vendor sponsoring our meeting. The doctor list includes the location, store number, district number, doctor name, email address, store address, phone number, FAX number and store address. The Wal-Mart contact list includes names, phone numbers and email addresses for key managers. Senior management, professional relations staff, third party staff, operations staff and area district managers are included in the list. One tip here might be to recruit a volunteer from your group to consistently maintain these two lists.

Meeting Structure:

Our meetings are sponsored by a vendor, usually a contact lens or solution manufacturer. CIBA, Vistakon, Cooper and Alcon all have been active sponsors. The vendor is given a strict 20 minute time limit for their presentation and they are very happy to have the time. Also important to the vendor is having many Wal-Mart doctors in one room without the distractions of visiting the doctors in their vision centers.

Generally, we gather for a meet and greet at 6:30 with the vendor presentation starting promptly at 7:00. Dinner is started at 7:00 as well. This allows the facilitators to have dinner, it keeps the meeting efficient and allows the doctors to get home at a reasonable hour.

We have had an open bar at most of our meetings but we recently switched to a cash bar. Although vendors are very willing to cover the expense of an open bar, Wal-Mart guests pay for their own dinners. In open bar situations, the Wal-Mart representatives will usually have to pay for alcohol that they never consume. Switching to a cash bar has helped Wal-Mart keep their expenses down and thus return savings to our patients.

The doctor-facilitators should share presentation duties. This serves to share the work, responsibility and credit (and maybe the blame).

Agenda Details:

- Welcome. We usually include a reminder of our purpose, goals and motto (P-P-P: Positive – Productive – Profitable).
- Vendor presentation. Again, the vendor is asked to keep their presentation to 20 minutes.
- Introduction of new doctors and guests. We list the doctors and Wal-Mart representatives on our agenda.
- Updates from previous meetings. Here, we give the status of proposals made to the home office or projects in development. Individual committee leaders often step up to give reports.
- Guest presentations. This enables our Wal-Mart guests to speak or any special guests we may have invited such as our state board officers, vendors, etc.
- Tips for success. This is an opportunity for doctors to share ideas, primarily in the area of practice management and increasing exam volume. For example, in our last meeting, we had a presentation about flyers attached to contact lens solutions and obtaining free mailing lists for consumers in a doctor's practice area. We always try to hand out samples of promotional items in the manila folders.
- New topics. This part of the agenda is often used to discuss opportunities in our vision centers. One of our goals is to avoid gripe sessions by encouraging the attending doctors to offer positive solutions to problems they bring to the group.
- Closing. We always allow our guests to make brief comments at the end of the meeting and we set the date for the next meeting.

Final Suggestions:

- Remember the leadership of your group should be three doctors. This insures thoughtful organization and philosophy, it prevents extremes of direction, it promotes sharing of the workload and it keeps everyone going when you run into difficulties.
- Take time to do the basics like DM conference calls. This gets all the doctors in your district involved. Help your DM to make this happen.
- Be patient with the pace of getting things done in your group and with the home office.

If you need help or advice, feel free to contact me at store 615 or through my email – larryrbrown@bellsouth.net.

**Details on Working with Vendors and Meeting Facilities
Initiatives, Achievements and Suggestions
Dr. Naheed Ahmad, Store 1587, Roswell, GA**

I joined as a facilitator for our group when Dr. Clemmons and Dr. Brown asked for volunteers. I also wanted to better understand the structure of our work situation and be proactive in making things better. When I unexpectedly found myself speaking at one of our early meetings, Dr. Brown described it as “character building.”

Finding Sponsors:

This is probably the easiest part of organizing your meetings. Vendors are very anxious to present information to a group of Wal-Mart doctors in one location away from the distractions and limited time available in the vision center. To get the ball rolling with vendors, simply contact your local reps and ask whether they would like to sponsor a meeting. For us, CIBA, Vistakon, Cooper and Alcon have all been willing sponsors. Make sure the vendor understands that they will be limited to a 20 minute presentation.

Choosing a Meeting Location:

Try to find a location that is central for all the doctors in your area. We have had the best experience by using a nice restaurant that has a private meeting room and a diverse menu. Although a hotel may be a good choice, using a popular restaurant will encourage healthy doctor attendance. Your vendor may have experience in this area and may be a great source for location ideas. Our favorite restaurant serves several appetizers, salads, main courses, vegetables and deserts family style. Others restaurants have offered two main course choices with a common salad and dessert. In any case, make sure the food is good! Another tip is to make sure you have a vegetarian main course to satisfy the health or religious concerns of some of your doctors. A pasta dish usually is a good fit. You might also consider asking your doctors to express any dietary needs via their RSVP to your meeting announcement.

Major Initiatives of the Atlanta Group:

- Doctor Services Proposal. This proposal seeks to quantify the services provided to doctors under the 10% and 20% rent scenarios. Dr. Travis and the home office staff, after several reviews, were able to incorporate this proposal into the lease contracts for doctors under the 20% rent scenario!
- Monthly conference calls with the DM.
- Answering system for all vision centers nationwide. Most of us are required by our state boards to be available to patients 24/7.
- Grass Roots Survey question changes. We submitted 20 new survey questions to the home office. So far, we have managed to get a few added to the recent surveys.
- Practice coverage plan for disabled doctors. **Dr. Fred Cox (store 2890)** is chairing our committee in this area. This program will assist doctors who are temporarily unable to practice by scheduling volunteer doctors from our group to cover the practice for a period of 5-6 weeks at no cost to the doctor.
- Incident reports and legal department responses. When an accident occurs to a patient while under care of a Wal-Mart doctor, the store personnel file an “incident report” to the Wal-Mart legal department. We have been working through professional services to make sure that Wal-Mart communications with the patient are appropriate and do not place the doctor in an uncomfortable position.
- Feedback to the home office on the reminder card system. We have been working with the home office to provide information on the limitations of their new system as well as suggestions that may make the system more efficient and effective.

Other Achievements:

- Getting better acquainted with other doctors in our region.
- Improving relationships with our DM's, RM and home office staff.
- Helping each other with business ideas.
- Setting a foundation for better communication and understanding between the doctors and Wal-Mart.

Future Goals:

- Improving relationships with our vision center managers.

- Improving relationships with Division I, being more visible to Div. I and promoting more understanding of our unique needs.

Final Thoughts on Meeting in your Area:

- Keep the format simple and consistent.
- Be committed.
- Do what you say and follow through.
- Be patient – progress may take time.
- Promote mutual respect for everyone attending. You don't have to always agree with everyone but respect is crucial.
- Present suggestions in a positive manner.
- Try to always put forward a potential solution when presenting an “opportunity.”

You can contact me at store 1578 or through my email – nish2332@netzero.net.

Top 10 Tips For Starting Doctor Meetings:

- Commit to regular quarterly meetings. Schedule at least one closed meeting annually (leasing doctors only). Set your next meeting date before finishing the current meeting.
- Invite your regional, DM's and occasional Division I management to your open meetings but control the meeting agenda and the direction of your group.
- Use CE at some meetings to encourage attendance.
- Have at least three doctors for a leadership team to help spread the labor and responsibility and accurately represent the entire group. Establish committees of 2-3 doctors to handle individual projects.
- Establish monthly conference calls with your DM's.
- Establish and maintain a doctor list containing essential information like store location, store number, email address, store address, phone number and FAX number.
- Email and FAX invitations so everyone can be reached. Use an internet FAX service to save time and effort.
- Start meetings on time, start dinner right away and have the vendor start the meeting with a presentation having a time limit of approximately 20 minutes.
- Have a cash bar to help reduce costs for your vendors and in consideration for the Wal-Mart representatives that have to pay for their meals.
- Choose a moderately-priced, popular restaurant in a central location for your meetings. Choose menu items to allow for religious restrictions (include pasta and fish in your selections).