

Top Protocols Needed in Your Plastic Surgery Practice

By Mara L. Shorr

As a consultant for plastic surgery practices across North America, I am often asked about key factors leading to the success of a plastic surgery practice.

While this certainly includes everything from a strong internal team, effective devices and top-tier surgical results, the most missed opportunity is not making sure processes and protocols are in place from the start.



What happens when a patient first contacts your practice, who responds, in what format and how often? From then, establish what happens if the patient books the appointment right away... and what happens if they do not. Who follows up with them, how and how often? How will both the patient continue to stay on your radar, and you on theirs?

WHERE TO START?

1. **Detail your hiring process for each new staff member.** I find that often, practices tend to look at hiring and onboarding as one in the same. However, the hiring process starts from the moment you consider adding another employee or independent contractor to your team. Establish what you are looking for with each addition. Creating a job description will help you gain clarity from the beginning. This should include not only the role and tasks the team member will be performing, but their background requirements as well. Add the benefits included with the position in the job posting, including everything from free parking to paid time off, from health coverage (or a stipend for the individual team member) to pet health insurance. Whatever you offer... include it!

   Establish your interview process (which team members will partake, when and via which virtual or in-person formats), and then establish what the offer letter process looks like once you find your unicorn. (Hint: always include a background check! Trust me.)

2. **Add an onboarding process.** Once you hire your next rockstar, it's time to make sure they have a successful launch. We work with our clients to detail the onboarding timeline, starting with the week leading up to the new staff member's start date. Make sure to include rundowns for their first day, their first week and even their first month. For example, establishing their personnel file can be done in advance, for instance. Who gives them an office tour? Who will they shadow the first week? Which software will they have access to? Which digital courses should each position take from your EMR's training for the first week? Include it all.

3. **Create a smooth process for tracking leads from start to finish.** While many EMR systems have a built-in lead tracking function, make sure your practice establishes each step of the patient journey either way. This should include what happens when a patient first contacts your practice, who responds, in what format and how often. From then, establish what happens if the patient books the appointment right away... and what happens if they do not. Who follows up with them, how and how often? How will both the patient continue to stay on your radar, and you on theirs? What is the process of the consult, and how do we take that patient from a lead/prospect to a booked patient on your surgical schedule?

   Yes, this is a lot to think about. But trust me. It's worth establishing this all upfront.

4. **Ensure your surgical team is aware not only of each role they are responsible for in the OR, but for each piece of paperwork before and after surgery they must log and have signed as well.** From documentation to signatures and filing, we find this can easily be missed and lead to errors when everyone assumes someone else is responsible. I've seen pieces of a chart go missing, medications improperly logged and improper patient pickup by chaperones when everyone assumes someone else is responsible.

5. **For every process and protocol you create, write it down!** Each should live as a digital file that can not only be easily viewed by anyone who may need it in perpetuity but updated on an ongoing basis as well in your virtual cloud system. (Tip: Create your processes anything software-related as a screen-recorded video that can be stored within Loom or a private YouTube channel as long as it does not contain PHI.)

In the end, remember getting started is the key. Even if you don't have each item documented today, establishing one item per day (or per week!) makes all the difference.

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