

Creating an Efficient Workflow: Practical Steps to Optimize Your Practice Operations

David Kading, OD, FAAO | drdave@specialtyeye.com
Mile Brujic, OD, FAAO | mile.brujic75@gmail.com

Why Workflows Matter in Modern Practice

Most practices run on **habit and tribal knowledge** — not documented processes. When a staff member leaves, their “know-how” leaves too, and new hires require time-consuming retraining. Without standard operating procedures (SOPs), inconsistency and errors become the norm.

- **Staff burnout** is closely tied to repetitive tasks, vague roles, and unclear expectations.
- More than **50% of healthcare staff report dissatisfaction**, with administrative burden being the top driver.
- Workflows reduce decision fatigue, improve consistency, and make the practice *feel less chaotic*.

Key Point: The right workflows save time, reduce turnover, and build a practice that doesn’t collapse when someone is out sick.

Reflection Prompt: Where in your practice do you see the most “reinventing the wheel”?

Building Capacity: Freeing Up Time to Work on the Business

Designing workflows takes **time and headspace** — something many practices lack. To create that time, you must **remove low-value work** from your in-office team:

- Delegate inboxes, phone calls, pre-authorizations, and repetitive admin tasks to a **virtual team**.
- Use **AI tools** to draft SOPs, refine policies, and document training steps.
- **Record every training** so new staff can self-onboard later.
- Create “**process improvement hours**” or assign **process owners** to ensure systems evolve.

Quote to Remember: “What doesn’t get looked at gets overlooked.”

Result: Your team gains *capacity* to improve — instead of just surviving the day.

Clinical Flow Optimization

The exam room is full of bottlenecks: doctor charting, unclear handoffs, and rushed education. These not only slow things down but also hurt patient experience and revenue.

Solutions include:

- Virtual scribes for real-time charting.
- Cross-training techs and opticians for partial scribing.
- Clear handoff protocols (both verbal and written).
- Templates and automation for post-exam communications.

Workflow strategies:

- Batch tasks (letters, referrals, product orders).
- Assign ownership so duplication disappears.
- Measure progress with checklists and task dashboards.

Quote to Remember: “What gets measured gets managed.” – Peter Drucker

Reflection Prompt: Which clinical task drains the most doctor time in your practice?

Billing, Recalls, and Front Office Flow

The **front desk** is the heart of practice chaos. Every missed call is a missed opportunity. Common overwhelm includes insurance checks, follow-ups, and patient outreach.

Virtual team support can:

- Manage recalls, reactivations, and benefit verification.
- Answer overflow calls and voicemails.
- Prepare insurance details before the patient arrives.

Automation tools can:

- Offer smart scheduling directly on the website.
- Send automatic reminders and confirmations.
- Collect digital intake forms before visits.

Key Point: SOPs reduce friction, eliminate variation, and make patient flow smoother.

Scalability, Morale, and Long-Term Success

Practices relying on “a few multitaskers” quickly hit a ceiling. Sustainable growth requires **documented workflows** that allow any trained staff member to step in.

- SOPs provide the baseline for performance reviews, raises, and accountability.
- Morale improves when tasks are predictable, workloads are fair, and new hires feel empowered.
- Burnout decreases when experienced staff focus on higher-value work, while newer staff follow SOPs to become productive faster.
- Virtual teams let you “**buy time**” without overloading your core team.

Reflection Prompt: How would your practice change if every task had a clear owner and SOP?

Action Plan

1. Identify your biggest workflow bottleneck.
2. Free up time by shifting low-value tasks to virtual staff.
3. Use AI + virtual support to draft and maintain SOPs.
4. Optimize clinical flow with scribes, clear handoffs, and batching.
5. Strengthen the front desk with recalls, automation, and overflow call support.
6. Build a scalable system that reduces burnout and improves morale.

Final Question: What is one workflow you could document or delegate this week that would reduce stress for your team?