

# PRIVATE PRACTICE HORROR STORIES



Dr. Julie Helmus, OD  
2023

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# DISCLOSURES



Dr. Julie Helmus has no relevant financial relationships to disclose. The content and format of this course is presented without commercial bias and does not claim superiority of any commercial product or service.

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# DISCLAIMER

## WHO I AM:

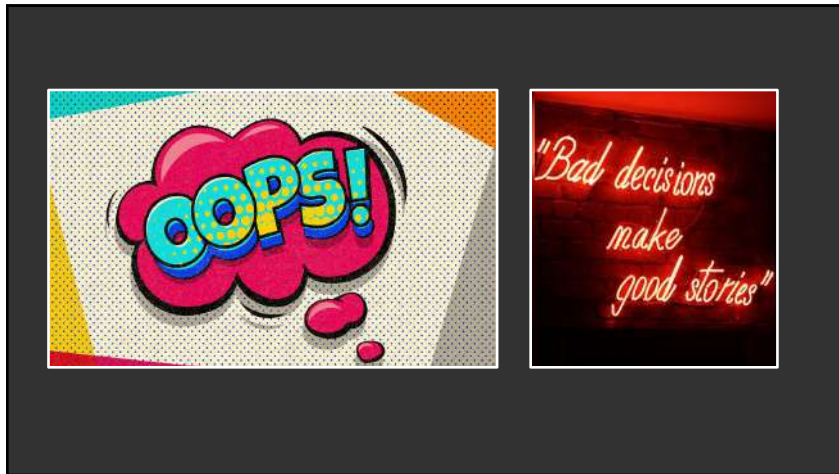
- Second-gen OD
- Millennial (1981-95)
- Transparent
- Californian employer



## WHO I AM NOT:

- Lawyer
- CPA
- MBA
- HR specialist

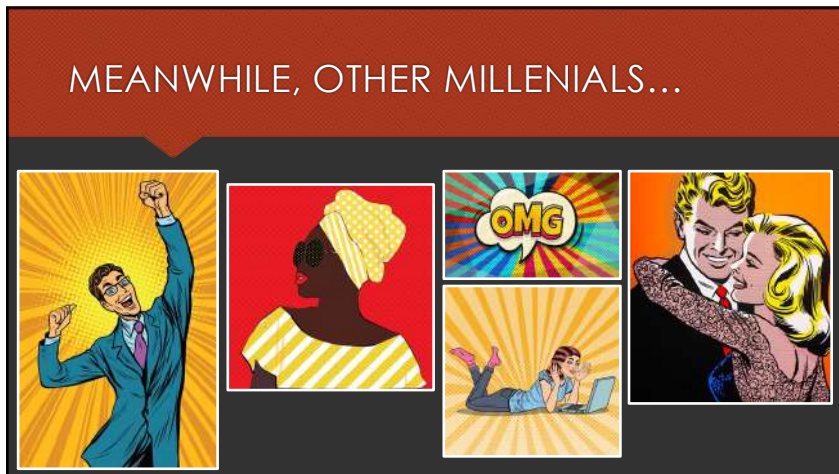
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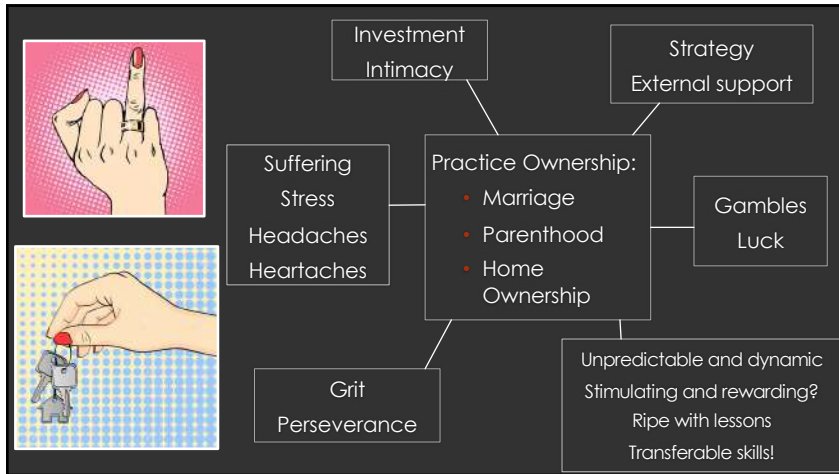
### What Does it Take ... to be a Successful Business Owner?



<p><b>PERSONALITY:</b></p> <ul style="list-style-type: none"> <li>○ Energetic</li> <li>○ Decisive</li> <li>○ Grit</li> <li>○ Intelligence</li> <li>○ Organized</li> <li>○ Responsible</li> <li>○ Common Sense</li> </ul>	<p><b>ATTITUDE:</b></p> <ul style="list-style-type: none"> <li>○ Confident</li> <li>○ Positive</li> <li>○ Tenacious</li> <li>○ Willing to work longer hours</li> <li>○ Independent-minded</li> <li>○ Open to change</li> <li>○ Open to learning</li> </ul>	<p><b>LEARNABLE:</b></p> <ul style="list-style-type: none"> <li>○ Enjoys Leading Others</li> <li>○ Basic business acumen</li> <li>○ Okay giving up company benefits</li> <li>○ Okay with professional isolation</li> </ul>
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\*Credit to Dr. Mick Kling

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## ATTITUDE

- Bring it.
- Each new hurdle = a new experience to add to the collection
- Walk through fire and emerge a new version
- Rearrange goals: no longer to get more done, but rather have less to do

An attitude is a terrible thing to waste

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## TIME FRAME

- How long to crawl out of crisis mode?
- More than "two seasons" as predicted by a well-known industry consultant
- Reinvent/rebuild/stabilize requires: 9 months – 2 years
- Flourish in 3 years

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Is it worth it?


**DEAL WITH IT**



The ongoing question.  
Not for everyone.  
I haven't sold yet!

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**OUR MEDICAL ROOTS**



- "You can't know what abnormal is unless you know what normal is"
- Prevention vs treatment: proactive vs reactive
- Know when to punt

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**(PRIVATE PRACTICE)  
CASE STUDIES**



Expensive mistakes and how to avoid them

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**OPENING SCENE**



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# BAD CONTRACT

## Contentious OD Partner Divorce

- S-Corp
- Three Helmus partners, one outsider
- Options: endure vs dissolve vs buy out
- My legal fees: \$26,000
- Mom's legal fees: \$26,000
- Time to close: 10 weeks
- Have an escape clause



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## NOT THIS TIME!



- Buy-Out price tag \$\$\$
- Financing
- Non-Compete
- What now?



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THE IMAGE THAT CARRIED ME THROUGH



WHY IS DIVORCE SO EXPENSIVE?



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# NO CONTRACT

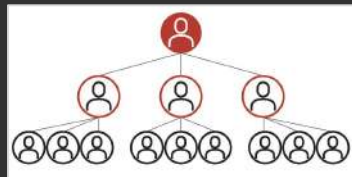
- Independent Contractor
  - CA Assembly Bill 5 (2020)
  - Medical Biller
  - Small Claims Court
  - "Meeting of the minds"



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## BAD STRUCTURE

- No staff org chart
- No leaders
- No room for growth
- No investment
- No training of staff



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## BAD COMMUNICATION

- No meetings
- No memos
- No one-on-one
- Over-sharing



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## UNREASONABLE EXPECTATIONS

Office Manager as The Savior



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## BAD HIRES


1. The Tidsoptimist
2. The Unvetted
3. The Uninsured
4. The Thief
5. The Con Artist
6. The Bully
7. The Princess
8. The Flake
9. The Airhead
10. The Ghost



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## (POSTPONING) DIFFICULT CONVERSATIONS

- The receptionist who saw it coming
- Associate OD: partnership off the table



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## BAD DECISIONS


- Paying out vacation before accrued
- COVID dismissal



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## BAD POLICIES


- No frame adjustments or repairs for outside purchases



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## BAD INFRASTRUCTURE

- Internet outages
- Power outages



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## BURGLARY DECEMBER 2020

- Friday Morning @ 3:30 AM
- Single male
- In-and-out in 80 seconds
- Straight for Maui Jims
- Alarm activated
- Video footage captured
- Cops on the scene
- No suspects



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### BEFORE



EXTERNAL VIEW



INTERNAL VIEW


### AFTER




EXTERNAL VIEW

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INTERNAL ROLL-DOWN SECURITY DOOR





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## FAKE VENDORS

### MiCrO Shapes

- Initially legitimate frame vendor
- Charged credit card for fraudulent orders under various aliases:
  - Framous Optical
  - Famous Frames
  - Rare Optical
  - Rare Vintage and Overstock
  - Framefling
  - Arnel Reproductions
- Sent consignment frames worth \$3



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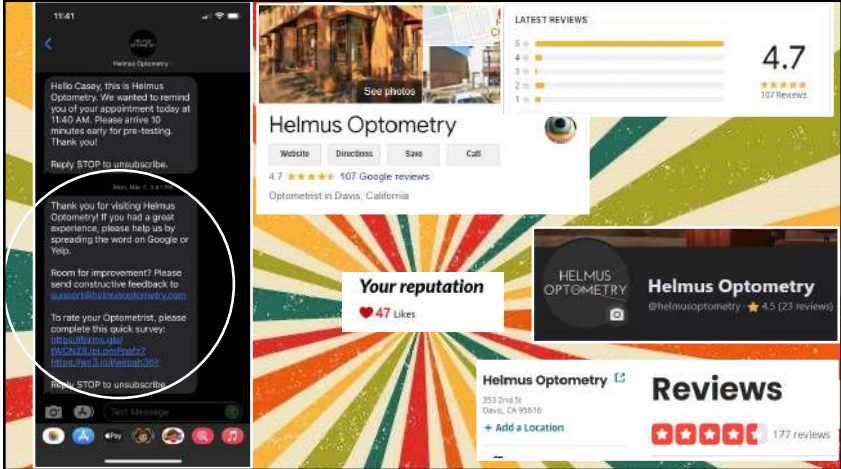


## BAD REVIEWS

- Responding to negative patient reviews on Yelp, Google, Facebook etc
- Sock puppet
- Reviews egged on by competitor
- HIPAA considerations




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## REVIEWS: LOVE/HATE

- You can't please everyone
- Check out other businesses
  - Most reviews are either 5/5 or 1/5
- Management:
  - Respond to all?
  - Disconnect + Delegate?
- Patients:
  - Give them an outlet to vent
  - Give out business cards
  - Make it easy to praise
- Get Staff Involved




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## BAD LUCK

*"Patient TS called regarding a pair of glasses that were dispensed to her about a month ago and were made incorrectly and caused her to fall."*

- Patient tripped in new bifocals
- Injured party TS, 57 YOWF
- Established BF wearer
- Requested Insurance Info
- Outcome...



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## BOARD COMPLAINTS

A sure-fire way to ruin a day




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## REVENGE PORN

2022 Incident w/ 60 YOWM Optician

DEFINITION: revealing or sexually explicit images or videos of a person posted on the internet, typically by a former sexual partner, without the consent of the subject and in order to cause them distress or embarrassment.



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- 100% owner!
- Patient Care "Sabbatical"
- Team of advisors
- STAFF: better pay, benefits, holidays, schedules, culture



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# BUILD YOUR TEAM

ROSTER  
31 Employees (25.5 FTE staff)

- 7 Teams:
  - Leadership (3)
  - Optical (7)
  - Front Desk (4)
  - Medical Assistants(5)
  - Billing/Accounting (3)
  - Contact Lenses (2)
  - Doctors (5 = 2.5 FTE)



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# AND NOW

- Capacity:
  - 175 comp exams/week across 5-day work week
  - 7,261 comp exams/2021
- Equipment upgrades and additions
- Expanded in 2020 (+1,800 sq ft)
- Remodel in 2021
- Sabbatical 2022 and 2023
- Financial:
  - 2021: \$3.1 mill
  - 2022: \$3.5 mill
  - 2023: on track for \$4 mill



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SUCCESS  
IS NOT AN  
ACCIDENT



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Dad's Advice:

"Do what's right for the patient, and you'll be successful."

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Thank you!

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