



Presentation Summaries

Michael A. (Mick) Kling, OD

3434 4th Avenue

San Diego, CA 92103

Email: dr.kling@invisioncare.com

Voice/Text: **619-379-2560**

Web: www.impactod.com

Social: www.facebook.com/impacteyecare

About Impact Leadership

Dr. Michael A. (Mick) Kling is a leadership trainer, consultant, speaker, innovator and entrepreneur. He is the founder and CEO of Impact Leadership, which provides leadership, culture and business consulting for the eye care community. In addition to Impact Leadership, Mick is the founder and CEO of Invision Optometry, one of the largest, single location optometric practices in San Diego, California. Recently named “America’s Finest Optical Retailer”, Invision Optometry is considered one of the most unique and innovative practices in the country.

Prior to founding Impact Leadership, Mick acquired significant business experience having started several companies and purchasing multiple practices over the last 25 years. He is a founding member and past president of Refractive Management Services Corporation, a refractive management company, which he later sold to TLC Vision.

His dedication and commitment to continued learning and improving outcomes has led to his passion of becoming a better leader, innovator and mentor to fellow eye care providers. He has developed a notable reputation for providing conscientious and impactful advice, an engaging and influential speaking style, and innovative solutions for the most crucial challenges facing practice owners today.

Mick earned his Doctor of Optometry degree, with honors, from Southern College of Optometry in 1993 and went on to complete his residency in Ocular Disease at Omega Eye Care Center in Jackson, TN. He is originally from Indiana, raised in Arkansas, and has resided in San Diego for almost 25 years. When not working, he spends time with his wife Jennifer, and two sons, Robert and Ryan. Outside of work and family, Mick fulfills his passion of playing guitar in his rock band, Backstage Pass, which can frequently be seen gigging in and around the San Diego area.

Leadership, Culture and Innovation

Contagious Leadership: Spreading Passion and Purpose

1 Hour

COPE ID: 59010-PM

The behaviors, attitudes, beliefs, actions and perspectives of any leader are “contagious” to its followers. Like a virus, our behavior, words, body language and mood directly impact the attitude, productivity and performance of the teams that we serve.

Here we will discuss the concept of “social contagion”, that is, the impact that we, as leaders, have on those that we lead. By understanding our impact on others, we’ll better understand the needs of the organization, and create an environment that allows our teams to thrive and fulfill their greatest potential.

Not happy with the results that you are getting? Understanding that the leader is often both the problem and the solution is the first step toward understanding “social contagion” and creating the type of organizational culture you desire.

Leading A Winning Team: Strategies for Effective Leadership

1 Hour

COPE Approval Pending

Simply put, leadership is influence. And getting the results that we desire requires us to become effective influencers over the organizations that we lead. Fortunately, nature provides us with some unique tools that, when understood, can increase our likelihood of positively influencing others. Here we’ll explore three “weapons of influence” that can increase our chances of getting others to follow our lead. We’ll also discuss our “Locus of Control”, that internal voice telling us who is in control; and we’ll explore proven strategies to effectively managing a multi-generational workforce.

Creating A Culture of Trust

1 Hour

COPE ID: 46595-PM

We are biologically created to trust one another. Our survival depends on it! And your role as a leader in your organization is to create a "circle of trust" that allows you and your team to not just

survive, but thrive. For the conditions inside that circle are the only thing that matters. We all want (and need) to trust and be trusted, and we trust others that make things happen.

Ever wonder why some follow your advice without hesitation, while others question everything you do? Often, it simply comes down to trust. We'll dig into what trust really is, how nature has programmed us to trust others, what's required to earn someone's trust, and how we can utilize these principles in our practice to create a culture of trust with our patients and staff.

The New Customer Experience: Staying Relevant in a Changing Eye Care Economy

1 Hour

COPE ID: 52292-PM

Except for new medical technology, the process of delivering eye care has remained relatively unchanged for the past 50 years. The routine of scheduling appointments, checking patients into our offices, measuring visual function and determining an eyewear prescription is the same now as when our most seasoned colleagues completed their training.

Our profession has recently seen a disruptive challenge to the way we deliver eye care with virtual, online and mobile eye exams. While these new controversial delivery models are being evaluated in the legal arena, what is not being questioned is how we as consumers are shopping. The internet has changed the retail experience, and the subsequent threat to traditional brick and mortar business has now given way to a completely interactive experience with online, mobile and traditional shopping, all occurring in the retail space. For our practices to compete for this new economy, and for the next generation's business, it becomes imperative that we become relevant, creative, and efficient, while offering a unique shopping experience.

The New Customer Experience: Staying Relevant In A Changing Eye Care Economy presents a vision for the future of eye care delivery including how we design, build, and operate our practices. We'll discuss the power of branding and storytelling, the impact of the millennial shopper, how the new interactive retail experience might look, and what the most innovative companies in the world are doing today to stay at the forefront of offering an engaging customer experience.

Weapons of Influence and Persuasion

0.5 Hours

COPE ID: 53789-PM

Leadership is influence. Effective leaders possess the skills and knowledge to persuade others into action. As humans, we are hard-wired to respond to external "triggers" which result in predictable

behaviors and actions from those we influence. By understanding and utilizing these human tendencies, we increase our ability to persuade others into action, and positively impact their decisions.

We will discuss three powerful, fundamental psychological tendencies that directly impact human behavior: *The Power of Because*; *The Law of Reciprocity*; and *The Rule of Consistency*. Each of these “weapons of influence,” once understood and mastered, can become effective tools of persuasion; thereby helping you achieve your leadership and organizational goals.

Business Management

Building Your Financial Foundation

1 Hour

COPE ID: 46694-PM

Optometrists receive very little business training during the traditional 4-year optometric curriculum. Yet, most ODs find themselves at some point responsible for some, if not all, aspects of the business operations of the organization. This presentation focuses ODs’ attention on their role as CFO of their practices.

Here we will take a broad look at 5 fundamentals for establishing a sound financial foundation for an optometry practice: Budgeting; Financial Statements; Managing Cash Flow; Tracking Progress; and Planning. We will attempt to gain an understanding of the importance of a solid financial foundation and discuss the impact of poor financial planning on a practice.

Creating A Practice Budget: The Foundation for Financial Success

1 Hour

COPE ID: 58586-PM

Successful businesses follow a structured financial plan for both projecting income and anticipating expenses, yet many small businesses, and most independent optometric practices, don’t utilize a budget to manage their finances. We’ll explore the importance of creating a budget, why most OD’s don’t follow (or even create) a budget, the steps to create your own budget, and strategies to help you stick with it.

Why Cash Matters: Understanding How Your Cash Flows

1 Hour

COPE ID: 58587-PM

The number one reason that most businesses fail is that they simply run out of money. While it may be true that any number of factors such as lack of planning, poor financial controls, bad management and lack of financial discipline may contribute to the ultimate demise of any organization, what finally slams the door shut is when business capital is exhausted. Here we will understand how cash flows into and out of a practice, what causes poor cash flow, pitfalls to avoid finding yourself in a “cash crunch”, and strategies for successfully managing your cash flow.

Key Performance Indicators: Measuring What Matters

1 Hour

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While Financial Statements monitor how well we are keeping our financial house in order, Key Performance Indicators (KPI's) allow us to drill down into the specifics of what it is that we do every day. Keeping score in our practice is an important part of our practice checkup, like having routine lab work performed at our annual physical. Key indicators such as blood pressure, blood sugar, cholesterol, triglycerides and PSA's in men give us an indication of our overall health and well-being. These critical tests provide ranges of what should be expected, as well as warning indicators should things slip out of normal range.

Here we will explore a few of the most important KPI's for an optometric practice, what each one measures, and provide suggestions on how to track and improve our performance on a continual basis.

Understanding Financial Statements: What Your Banker Wants to Know

1 Hour

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Financial statements are the roadmap for any successful business. Like a long-distance runner following a marathon course, financial statements tell you where you are (the mile marker), how fast you are going (your pace) and how much further you must go (the finish line). They let you know if you are on track, heading in the right direction, and how much further you need to go to achieve your goals.

Understanding Financial Statements are critical for business owners to achieve financial success. Without keeping track of your progress, it's easy to lose track of where you are and where you are heading. Here we will explore the 3 basic Financial Statements: The Profit and Loss Statement; The Balance Sheet; and The Statement of Cash Flows. We will distill down what you really need to know about each of these reports, understand the differences in what they tell us, and learn to identify the key information to successfully monitor where your business is heading.

The Emotional Impact of Money: How It Affects Our Business Decisions

2 Hours

COPE ID: 46196-PM

How does money make you feel? Happy? Stressed? Secure? It can be different for all of us, and in this presentation, we'll start with some examples of how money can affect our perception. We'll learn a little economic history, how money effects our society, and delve into what current science says about how we perceive money and how it influences our behavior. Finally, we'll explore own "money personality" and how it impacts our decisions, relationships and businesses.

Building Business Acumen: The Building Blocks for Financial Success

(Handout Provided)

2 Hours

COPE ID: 58657-PM

Optometrists receive very little business training during the traditional 4-year optometric curriculum. Yet, most ODs find themselves, at some point, responsible for at least some aspect of the business operations of the organization. This course takes a deeper dive into the ODs' role as CFO of their practices.

We will take a detailed look at the 5 basic fundamentals for establishing a sound financial foundation for an optometry practice in a follow along format. This interactive course focuses on creating The Simple Budget, a simplified approach to budgeting; understanding Financial Statements; managing Cash Flow in your practice; Tracking Progress; and planning for the unexpected. We'll further explore our own perspectives on money and how they affect our practices.

The Profitable Doctor: Eradicating Practice Poverty

(Handout Provided)

2 Hours

COPE ID: 58656-PM

The number one financial challenge facing most optometric practice owners today is poor cash flow. Doctor owners often fall prey to focusing too much on top line revenue growth, while ignoring the increasing expenses and debt that often accompanies that growth. Without a plan, practice owners often find themselves living insurance check to insurance check, wondering how they're going to make payroll, financially overwhelmed and stressed out. This course presents a revolutionary new cash flow management system designed to immediately improve practice profitability, eradicate unnecessary business expenses and assist practice owners with managing their business debt.

Private Equity and Eye Care: Should I Stay, or Should I Go?

2 Hours (may be modified to 1 Hour)

COPE ID: 59110-PM

The eye care industry has recently seen a significant interest from private equity (PE) firms to capitalize on the future projected growth opportunities of the eye care market. Historically, larger, well established regional optometry and ophthalmology practices have been the target of these investors due to their existing operating infrastructure and significant market share. More recently, however, smaller independent practices have become the target of aggregation from multiple private equity investors offering various models of acquisition, depending on the long-range objectives of the investors.

We will discuss the current state of the private equity market and its potential impact on practice owners who may be considering a partnership or exit strategy with PE. We'll identify the current players in the market and discuss the various models offered to ECPs and other eye care related businesses considering this strategy. We'll also discuss the risks and opportunities of an acquisition by PE, the various valuation methods utilized, and ways of improving your cash flow to enhance the value of your business.