

FUTURE OPTOMETRIST

Planner



WILLIAMS GROUP

My Vision Board

Create a vision for your life by exploring short-term or long-term goals for each category to visually affirm your path to success.

PERSONAL	HEALTH
FAMILY	RELATIONSHIPS
CAREER	LIFESTYLE

"Dreams are extremely important. You can't do it unless you imagine it." - George Lucas

Career Preferences

When you think about your future as an optometrist, what comes to mind?

Location

Business Goals

Specialty

Salary & Benefits

Achievements

“Opportunities
don't happen, you
create them.”
CHRIS GROSSER

Having a positive mindset is easier when you focus on your achievements.

List three achievements you are most proud:

Why do these make you proud?

What additional achievements are you working toward?

Profile Template

Use this information to build your
resume and LinkedIn profile

NAME AND CREDENTIALS

HEADLINE

SUMMARY

EDUCATION

EXPERIENCE

ACHIEVEMENTS

My Current Skillset

Circle where you are now and put a star on where you would like to be. Make notes on how you can improve.

VERBAL COMMUNICATION SKILLS



USE OF DIAGNOSTIC TECHNOLOGY



CLINICAL EXAM SKILLS



EHR DOCUMENTATION



Notes:

My Current Skillset

BILLING AND CODING



OPTICAL/CL RECOMMENDATIONS



MEDICAL RECOMMENDATIONS



FINANCIAL ACUMEN



Notes:

SWOT Analysis

Your personal SWOT Analysis. Discover recommendations and strategies to overcome weaknesses and threats.

Strength	Weakness
Opportunity	Threat

Character Strengths

What are your character strengths? Utilize these power words when describing yourself. Do you have any additional strengths?

Accuracy	Honest	Open Minded	Sociable
Creative	Trustworthy	Critical Thinker	Well-Organized
Determined	Optimistic	Focused	Problem Solver
Disciplined	Innovative	Respectful	Negotiator
Dedicated	Attentive	Results Driven	Reliable
Enthusiastic	Empathetic	Adaptable	Objective
Flexible	Dependable	Persistent	Progressive
Patient	Detail Oriented	Proactive	Controlled

List your top ten strengths.

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

Are there areas you need to develop?

Character Weaknesses

Any character weaknesses? Reflect on how you can turn a weakness into a positive trait.

Describe your weakness.

How can this be perceived positively?

Describe your weakness.

How can this be perceived positively?

Describe your weakness.

How can this be perceived positively?

"Our greatest weakness lies in giving up. The most certain way to succeed is always to try just one more time." — Thomas A. Edison

Limiting Beliefs

When it comes to believing in yourself, what is holding you back?

Is there anything holding you back?

Where did this originate?

What can you do to mitigate this belief?

SMART *goals*

Set SMART goals for your career. Follow the SMART structure. Is the objective clearly stated? How will it be measured? Is it realistic? Does it make sense to you? Is there a specific timeline for completion?

S

S P E C I F I C

M

M E A S U R E A B L E

A

A T T A I N A B L E

R

R E L E V A N T

T

T I M E - B A S E D

To Do List

It's important not to jump straight into applying to positions until you feel confident. Take the time to list your goals for your long-term career, prepare your resume and social platforms. Research locations you want to live in and begin applying to open positions. Prepare for your interviews by asking yourself personal questions and preparing a follow up note.

PREP

Determine ideal position

Create resume and profile

Professional headshot

SEARCH & APPLY

Indeed

LinkedIn

INTERVIEW

Research practice

Dress professionally

Send personalized follow-up

Interview Questions

“Luck is what happens when preparation meets opportunity.” – Seneca

Tell me about yourself.

Tell me about your training and education.

Tell me about any gaps in your training/areas of development.

Tell me about your clinical preferences.

Tell me about your ability to:

- Manage your time in the exam room.
- Utilize diagnostic technology.
- Make medical recommendations
- Make optical/CL recommendations.
- Bill and code appropriately.
- Read a profit and loss statement.
- Track production metrics.
- Market yourself.
- Interact positively with staff.

Interview Questions

Tell me about your idea of an exceptional patient experience.

Tell me what resources you need to be successful.

Speak to your interests in partnership/ownership.

Tell me about your ideal work environment.

Tell me about your work style in a team/as an individual.

Tell me about how you would handle a patient who is upset.

Tell me about how you resolve conflict.

My References

“ Do not let what
you cannot do
interfere with what
you can do. ”
JOHN WOODEN

Name:

Title:

Company:

Phone Number:

Email:

Name:

Title:

Company:

Phone Number:

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Name:

Title:

Company:

Phone Number:

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Name:

Title:

Company:

Phone Number:

Email:

Practice Comparison

PRACTICE 1

Name:
Address:
Phone:
Email:
Website:

Notes:

Health Insurance?

Paid Time Off?

Retirement?

Parental Leave?

License?

Salary?

Bonus?

Hours?

Continuing Ed?

Partnership?

Buy-In?

PRACTICE 2

Name:
Address:
Phone:
Email:
Website:

Notes:

Health Insurance?

Paid Time Off?

Retirement?

Parental Leave?

License?

Salary?

Bonus?

Hours?

Continuing Ed?

Partnership?

Buy-In?

Practice Comparison

PRACTICE 3

Name:
Address:
Phone:
Email:
Website:

Notes:

Health Insurance?



Paid Time Off?



Retirement?



Parental Leave?



License?



Salary?

Bonus?

Hours?

Continuing Ed?

Partnership?

Buy-In?

PRACTICE 4

Name:
Address:
Phone:
Email:
Website:

Notes:

Health Insurance?



Paid Time Off?



Retirement?



Parental Leave?



License?



Salary?

Bonus?

Hours?

Continuing Ed?

Partnership?

Buy-In?

PROS & CONS

List the pros and cons of the opportunity you've been offered. This helps determine if this is the right decision for you!

pro

con

1

2

3

4

5

Start - Up

Dreaming of starting your own practice? There are considerations to think about first.

“ All our dreams can come true, if we have the courage to pursue them.

WALT DISNEY



BUSINESS PLAN

MY WHY

VISION OF MY OWN PRACTICE

PROS | CONS

LOCATIONS

- 1 _____
- 2 _____
- 3 _____
- 4 _____

FINANCIALS

BUDGET	LOAN INSTITUTIONS
RATES	



Contact List

Keep track of all of the important contacts that you've met that you may need throughout your optometry career.

Name	Tammi Sufficool	Company	Williams Group
Email	tsufficool@thewilliamsway.com	Phone	402.454.7188
Address	Lincoln, Nebraska		
Notes	Optometry practice transitions, consulting, financials, start-ups		

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Reflections

“The road to success and the road to failure are almost exactly the same.”
COLIN R. DAVIS

Focus

Highlight

- _____
- _____
- _____
- _____
- _____
- _____

To Do

Challenges

Improvement

Reflections

“ Setting goals is the first step in turning the invisible into the visible. ”
TONY ROBBINS

Focus

Highlight

- _____
- _____
- _____
- _____
- _____
- _____
- _____

To Do

Challenges

Improvement
