

THE PRACTICE SCALING ROAD MAP

The different stages of practice growth and how to navigate them.



BY ROD SOLAR AND LAURA LIVESEY

Scaling a cataract and refractive surgery practice requires more than clinical excellence—it also demands strategic growth at every stage. It is essential to understand where your practice stands and what constraints are holding you back. This article was inspired by a framework outlined by Alex Hormozi (acquisition.com), whose work—though outside the field of ophthalmology—provides a proven methodology for fostering structured, sustainable growth in eye care practices.

STAGE NO. 1: MONETIZE (JUST YOU)

At the earliest stage, you are operating independently, with no support staff. Your priorities are to establish your clinical credibility and generate your first sales. Key actions to take include the following:

- Demonstrate your surgical proficiency through patient outcomes and feedback;
- Communicate that you offer private surgical services;
- Develop your sales skills and learn to address patients' objections;
- Leverage free and low-cost software tools to manage patient scheduling, practice finances, and communication;
- Engage freelance assistance for website development and basic advertising; and
- Implement simple payment collection systems (eg, PayPal, Stripe).

The primary constraint on your practice is a lack of revenue, and the trigger for growth is making your first private surgery sale.

STAGE NO. 2: ADVERTISE (YOU AND FREELANCERS)

Once patients pay for your services, plateaus in practice growth are often due to inconsistent lead generation. Advertising and sales process optimization become critical. Key actions to take include the following:

- Refine service delivery to ensure patient satisfaction;
- Implement daily advertising routines;
- Use structured scripts for sales calls and consultations;
- Collect and publish patient testimonials;
- Remain organized with simple customer relationship management solutions and Google Workspace tools;
- Transition reliable freelancers into part-time or full-time team members; and
- Monitor your practice's financial performance and tax obligations.

The constraint on your practice is a lack of predictable sales volume, and the triggers for growth are consistent outreach and lead generation.

STAGE NO. 3: STABILIZE (TEAM OF ONE TO FOUR EMPLOYEES)

At this stage, you have a small team, but patient flow and communication may be uneven. Operational

IDENTIFYING YOUR GROWTH CONSTRAINT

Use the framework below to determine which stage your practice is currently in. Each stage is defined by a core constraint and a corresponding trigger for growth.

▶ STAGE NO. 1: MONETIZE

- **Constraint:** Lack of revenue
- **Trigger:** First privately funded procedure

▶ STAGE NO. 2: ADVERTISE

- **Constraint:** Unpredictable lead generation
- **Trigger:** Consistent outreach and conversion

▶ STAGE NO. 3: STABILIZE

- **Constraint:** Workload exceeds current resources
- **Trigger:** Hiring staff to manage patient flow

▶ STAGE NO. 4: PRIORITIZE

- **Constraint:** Trying to be everything to everyone
- **Trigger:** Focusing on ideal patients and procedures

▶ STAGE NO. 5: PRODUCTIZE

- **Constraint:** Limited services and low patient retention
- **Trigger:** Offering value-added, recurring services

▶ STAGE NO. 6: OPTIMIZE

- **Constraint:** Operational inefficiencies
- **Trigger:** Streamlining internal systems and processes

systems must be stabilized to support your practice's continued growth. Key actions to take include the following:

- Address common patient complaints proactively;
- Nurture leads via email and SMS communication;
- Define lead engagement metrics and hire staff to manage booking;
- Train front-office staff to provide an exceptional welcome experience;
- Eliminate redundant tools in favor of best-in-class solutions;
- Write clear job descriptions and use structured payroll services; and
- Establish systems for invoice and payment management.

The constraint on your practice is that your workload exceeds your current resources, and the trigger for growth is to hire additional staff to manage demand.

STAGE NO. 4: PRIORITIZE (TEAM OF FIVE TO NINE EMPLOYEES)

Your practice is growing, but its resources are strained. A strategic focus on ideal patients and procedures becomes essential. Key actions to take include the following:

- Define your ideal patient profiles (eg, older patients for lens replacement, younger candidates for laser vision correction);
- Offer services tailored to these populations;
- Decline cases that do not fit your defined patient profiles;
- Adjust pricing to reflect specialized care and premium service delivery; and
- Track patient data and interactions with simple customer relationship management software.

The constraint on your practice is that you are trying to be everything to everyone. The breakthrough is niching down to serve only people like your best customers.

STAGE NO. 5: PRODUCTIZE (TEAM OF 10-19 EMPLOYEES)

By this point, patients often receive one service and do not return. Introducing additional, value-driven offerings becomes necessary to increase patient lifetime value. Key actions to take include the following:

- Offer premium IOLs and refractive solutions;
- Expand your practice's services to include dry eye management and ocular surface optimization;
- Develop VIP care packages with concierge booking and additional follow-up; and
- Provide supplemental eye health products (eg, nutritional supplements and ocular surface treatments).

The constraint on your practice is a limited product and service portfolio, and the triggers for growth are introducing and marketing secondary premium services.

STAGE NO. 6: OPTIMIZE (TEAM OF 20-49 EMPLOYEES)

With a larger team, complexity can impede practice efficiency. Operational optimization encourages continued scalability and profitability. Key actions to take include the following:

- Develop comprehensive staff training programs;
- Ensure robust patient data security and streamline record management;
- Track key performance indicators and outcomes; and

- Simplify practice management systems for ease of use.

The constraints on your practice are wasted time and resources due to inefficiencies, and the trigger for growth is refining internal systems and processes for operational excellence.

WHY THIS FRAMEWORK CAN WORK FOR CATARACT AND REFRACTIVE SURGERY PRACTICES

Cataract and refractive surgery patients frequently engage with the practice only once. Productizing services and refining processes at each stage of growth can help maximize patient value, improve outcomes, and build a resilient, patient-centered practice.

CONCLUSION

Scaling your cataract and refractive surgery practice does not have to be overwhelming. By clearly identifying the current stage of your practice and understanding its specific constraints and triggers for growth, you can increase and sustain its profitability. ■

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