










Owner Summit 2023 Short Descriptions and Outlines

Speakers	Date & Time	Presentation highlights - brief description for marketing	Outline
	Sunday, March 26, 2023 – 4:15 PM	<p>Trust-Busting is Back, and That's Good for Your Small Business Stacy Mitchell</p> <p>After decades in which policymakers looked the other way as large corporations, including PBMs, used anti-competitive tactics to strangle competition and dominate markets, there's a growing effort in Congress and the Administration to dust off our long-dormant antitrust laws. In this keynote presentation, Stacy Mitchell will explore this remarkable shift and what it means for independent small-business pharmacies like yours.</p>	
	Monday, March 27, 2023 – 8:45 AM	<p>Pharmacy Culture is the (HEPA-Filtered?) Air You Breathe Wayne Ottum</p> <p>The data and anecdotal evidence, especially recently, is clear. Culture is king when it comes to attracting and retaining talent. The great resignation, quiet quitting, right-sizing of roles, and even quiet firing are just a few terms today that, at their core, are related to the type of culture you have in your business and whether it is one that today's workforce wants to be a part of. Like the air you breathe, the culture you have filters staff behavior, ethics, and performance. So, how do you create the right culture for your pharmacy? How do you install and maintain it? Discover how to put the right filter on your company culture and attract and retain top talent in these turbulent times.</p>	<p>Learning Objectives:</p> <ul style="list-style-type: none"> • The data and evidence behind culture's impact on today's hiring and retention environment. • The definition and components of culture. • A process for determining the right culture for your organization. • An overview of the process of installing and maintaining your culture.
	Monday, March 27, 2023 – 9:30 AM	<p>How Outcome MD is Working for Compounders Philip Smyth</p> <p>Patient Reported Outcomes can help to protect and expand the compounding profession by enhancing patient/ provider/ pharmacist communication and creating valuable data for your pharmacy and APC. But they can also help your bottom line. Here we will give a brief overview of the program, its current status and coming capabilities as well as share some success stories and ideas on how you can implement the program in your pharmacy.</p>	




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	<p>Monday, March 27, 2023 – 10:00 AM</p>	<p>What You See is Seldom What You Get: How Asking the Right Questions in the Job Interview Can Help You Avoid a Lot of Heartache Later On <i>Wayne Ottum</i></p> <p>Overview: The interview, or more precisely, the interview process, is the life-blood of effective hiring. Without effective questions, candidates can paint an appealing picture and provide you with just what you want to hear about their ability and fit. Often businesses do not take the time to clearly define the right questions that will simultaneously find the best available candidate while avoiding often disastrous hiring mistakes. In this session attendees will discover how interviews are part of a comprehensive hiring process and how to formulate effective questions focused on three critical aspects: how well the candidate does or does not fit your culture, the candidate’s understanding of and true passion for the role, and how well the candidates’ strengths align to the role.</p>	<p>Learning Objectives:</p> <ul style="list-style-type: none"> • The background on the importance of interviewing in candidate selection. • Where and how interviews fit into an overall hiring process, a process that gives you the information needed to form effective questions. • A process for determining the right questions for each role and for standard questions focused on your organizational culture. • Suggestions and best practices for conducting interviews.
 	<p>Monday, March 27, 2023 – 11:00 AM</p>	<p>In Case You Get Hit By a Bus: Getting (and Keeping) Your Pharmacy Affairs in Order <i>Michelle Moser and Kevin Borg</i></p> <p>Having a plan will not only help with organization of your business but also allow the next owner to continue the legacy you have built.</p>	<p>Learning Objectives:</p> <ul style="list-style-type: none"> • Understand the need for having an Emergency Succession (ERS) Plan • Understand personal and professional ERS Plans • Understand things to include in your ERS Plan • Gain tips on how to implement and communicate an ERS Plan
 	<p>Monday, March 27, 2023 – 11:30 AM</p>	<p>Coming In, Going Out: Mentoring as a Business Succession Strategy <i>Jason Jerusik and Owen Bondurant</i></p> <p>Learn about the importance of being a mentor and finding a mentor has on selling and buying pharmacies. Included in this presentation will be how pharmacies are sold and how the process changes when you have a buyer that is being mentored by you.</p>	<p>Learning Objectives:</p> <ul style="list-style-type: none"> • Introduction • Mentoring - Giving and Receiving • Types of buyers - individual, independent, chain, private equity. • Different ways to structure your sale - junior partnership, asset, stock, seller financing. • After closing the sale - what is your next



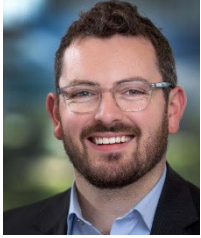



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			<p>step?</p> <ul style="list-style-type: none"> • Mentoring the next generation
	<p>Monday, March 27, 2023 – 12:15 PM</p>	<p>Grow Your Business with Doctor Detailing Nicolette Mathey The most successful pharmacies know the needs of their local prescribers' offices. They approach the “doctor detailing” sales process armed with the tools needed to partner with local prescribers, rather than pushing their own agenda. In this session, learn about key marketing materials and messaging that can make a big difference in carving out your successful niche and boosting your pharmacy business.</p>	<p>Learning Objectives:</p> <ul style="list-style-type: none"> • What is Doctor Detailing, and why does every pharmacy in the country need it? • How to Communicate with Local Providers & Patients <ul style="list-style-type: none"> - Digital Outreach - Physical Outreach • Logistics <ul style="list-style-type: none"> - Who will go into the field? - When will they go? - Whom will they call on? • Technology <ul style="list-style-type: none"> - CRM - Provider Lists - Dashboards • Content <ul style="list-style-type: none"> - Marketing Materials - Messaging - Developing a niche - Focusing on a specialty • Tips & Tricks <ul style="list-style-type: none"> - Getting Past the Gatekeeper, or as we like to call it, Aligning With the Gatekeeper - Small Touches - Become an extension of the office = Be one with the office - Develop those close relationships with the staff. - PROVIDE VALUE. • Hiring a Sales Rep <ul style="list-style-type: none"> - Goals - Progress & Visibility - Accountability - Compensation



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			<ul style="list-style-type: none"> • Leveraging Local Pharma Reps <ul style="list-style-type: none"> - Tag-Teaming Lunches - Providing Value
	<p>Monday, March 27, 2023 – 1:45 PM</p>	<p>OTC Sales Are Not a Side-Hustle T.W. Taylor</p> <p>Pharmacist should be the primary health professional for wellness. We know metabolic pathways. Nutritional deficiencies, both in drug-induced and diet-induced are real and the cause of disease. Repletion is the pharmacist's job and opens more tools in our toolbox helping our clients optimize their health, and health is the most important currency in life.</p> <p>You can take time to work on your health now or you will be forced to work on your illness later.</p> <p>Pharmacist should build each client a "Health Retirement Plan" to enjoy their Financial Retirement Plan.</p>	
	<p>Monday, March 27, 2023 – 2:15 PM</p>	<p>Properly Qualifying Your Vendors: How and Why Alexander Pytlarz</p> <p>This session will discuss and review how a compound pharmacy should initiate and maintain a Vendor Qualification Program. You'll learn what's needed, review examples of vendor qualification activities, and leave with a better understanding of the how and why of vendor qualifying.</p>	
	<p>Monday, March 27, 2023 – 3:15 PM</p>	<p>On the Business End of an FDA Inspection: A Case Study Anthony Grzib</p> <p>Even for a compounding pharmacy compliant with USP, 503A regs, and state board of pharmacy requirements, the outcome of an FDA inspection could lead to a sudden and unexpected loss of business. This presentation provides insight into how this can happen, and how one pharmacy managed through such an event to minimize the negative impact on their practice.</p>	<p>Learning Objectives:</p> <ul style="list-style-type: none"> • Inspection preparedness – the basics • During the inspection, signs that FDA may be headed down the “insanitary conditions” road • What a 483 containing insanitary conditions observations means, and what you can do immediately • Hope for the best, but plan for the worse – staying out in front of FDA’s next steps

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	<p>Monday, March 27, 2023 – 4:15 PM</p>	<p>Question Time with Tara <i>Tara Thompson</i> How many times a week do you find yourself with a question – find yourself needing to know something you don’t exactly know, wondering how others handle thorny problems related to their pharmacy business. Most of us have these questions daily. During the course of the conference, you will see index cards on your table and a fishbowl at the front of the room. Place your embarrassing, taboo, or most burning pharmacy questions on a notecard (anonymously!) and they will be read and answered via crowdsourcing – because ‘All of us’ is definitely smarter than any one of us.</p>	
 	<p>Tuesday, March 28, 2023 – 8:30 AM</p>	<p>APC’s New Credit Card Processing GPO <i>Christian Johnson and Joshua Pynn</i> Card processing fees are one of the biggest pains for most merchants, and pharmaceutical compounders are no stranger to the impact these outsized fees can have on their bottom lines. CMSPI will provide an update on the current opportunity with APC to relieve members of the pains of high card processing fees.</p>	<p>Learning Objectives: CMSPI and APC have been in the process of establishing a competitive offering for APC member processing. In this month’s presentation, CMSPI will take the stage and present the opportunity available to members and will highlight the steps ahead. The presentation will cover:</p> <ul style="list-style-type: none"> • the work to date • a snapshot of APC processing today • and the path forward.
  	<p>Tuesday, March 28, 2023 – 9:15 AM</p>	<p>Valuation: Should I Stay or Should I Go Now? <i>James Barker, Nick Antonucci, and K.C. Smith</i> Every business owner will eventually make and exit. However, not every owner will exit under their own terms. Exit planning is just good business strategy, and a fundamental starting point for executing that strategy involves understanding not only what your business is worth today, but what it could be worth in the future. This presentation focuses on helping owners determine how much the business is worth and using that information to make a decision to ‘stay’ and invest in the growth of the business to maximize future <i>transferable</i> value, or ‘go’ and proceed with taking chips off the table now.</p>	

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	<p>Tuesday, March 28, 2023 – 11:00 AM</p>	<p>Closing 483 Files: You Have to Ask, Dude! <i>Lee Rosebush, Esq.</i> In this discussion, attendees will learn about the 483 closeout process. Terminology such as FMD-145, EIR, and close out will be defined. Attendees will leave this presentation with an understanding of how to use FDA’s regulatory standards to successfully close an FDA Form 483.</p>	<p>Learning Objectives: What is an FDA Form 483? <ul style="list-style-type: none"> • What should I do after I receive 483 observations? • How is a 483 successfully closed? • FDA standard for closing an inspection </p>
	<p>Tuesday, March 28, 2023 – 11:45 AM</p>	<p>The Untapped Value of Human Connection <i>Rob Lawless</i> Human connection can help you feel like you belong, it can increase your sense of perspective and it can open the doors to opportunities you never would have imagined! In this talk, you'll learn from Rob Lawless, a man on a mission to spend 1 hour, 1:1, with 10,000 different people. You'll hear how he's run into his new friends in places far away from where he's met them, what he's learned from meeting the victim of a mass shooting and how he ended up flying in a plane that the pilot had built himself. You'll practice connecting with each other using the FORD framework (family, occupation, recreation, dreams) in 1:1 breakouts! You'll learn the importance of goal setting in intentional connection, and afterwards will feel confident in unlocking the true potential of conversation!</p>	<p>Learning Objectives</p> <ul style="list-style-type: none"> • Identify the 3 levels of value of human connection (sense of belonging, perspective, future opportunities) • Utilize the FORD framework in getting to know new people • Incorporate goal setting and reflection to achieve and inspire intentional human connection