

BOOTS ON THE GROUND MARKETING

DR. JULIE HELMUS, OD
COPE # 79979-PM

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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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HELMUS OPTOMETRY

SHOP LOCAL
SMALL BUSINESS
WOMAN-OWNED BUSINESS
FAMILY BUSINESS




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2021

2021 Gross \$3.1 million	2022 Goal \$3.5 mill	Mon-Fri 8AM – 6 PM
21 FTE staff total	5 ODs (FTE 2.25)	175 comp exam/week
7,261 comp exams/year	2021 Revenue/Pt \$444	2022 Q1 RPP \$512

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P&L

COGS	27%
TOTAL LABOR (NON-ODs)	25%
TOTAL OCCUPANCY	7%
OTHER*	12%
TOTAL OD	15%
TAKE HOME	14%

*OTHER: **MARKETING**, LICENSES, TAXES, INSURANCE, IT, SUPPLIES, EQUIPMENT, TRAVEL, ETC.

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- ## TODAY
- Internal Marketing
 - Community Engagement
 - Events
 - Relationships
 - Word-of-mouth
 - Reputation Management
 - Customer service
 - The Ask
-
- ## NOT TODAY
- Search Engine Optimization
 - Targeted Google Ads
 - Social Media: Facebook, Instagram, Nextdoor, YouTube
 - Print/Radio/Digital Advertising

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**THE ROOTS OF
SMALL
BUSINESSES
ARE IN THE
COMMUNITY**

7

**MANY TYPES OF
MARKETING**

Specific marketing is
more effective and
less expensive



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QUESTIONS TO ASK YOURSELF:

- 

Who is your target audience?
- 

Who is your competition?
- 

What's your ROI for various marketing campaigns?
- 

Do you have a marketing budget?
- 

What's your involvement in the community?

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**MARKETING IN AN
INFINITE GAME**



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**WHO IS MOST
LIKELY TO
BUY FROM
YOU?**

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**EMAIL
CAMPAIGNS**




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EMAIL BLASTS

- SEASONAL
- TIMING
- IMAGE
- PITHY
- PROOF-READ
- SUBJECT
- SUBJECT LINE
- HEADER
- LINKS
- CALL-TO-ACTION

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HELMUS OPTOMETRY


Let's All Avoid an End-of-Year Rush. Schedule this Fall!

USE or LOSE

SEPT 2020

"NOW IS THE TIME TO USE YOUR YEAR-END BENEFITS"

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HELMUS OPTOMETRY

Beat The Year End Rush

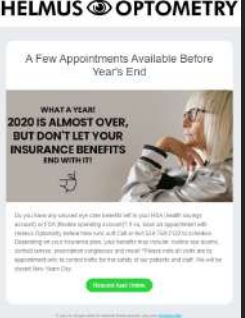
DON'T KEEP YOUR UNUSED BENEFITS IN QUARANTINE

LET THEM GOOSE BEFORE 2020 ENDS!

NOV 2020

"USE YOUR BENEFITS OR FLEX SPENDING PLAN BEFORE TIME RUNS OUT"

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HELMUS OPTOMETRY

A Few Appointments Available Before Year's End

WHAT A YEAR! 2020 IS ALMOST OVER, BUT DON'T LET YOUR INSURANCE BENEFITS END WITH IT!

DECEMBER 21, 2020

"LAST CALL FOR 2020 INSURANCE BENEFITS, FSA AND HSA!"

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Use it or Lose it!

DECEMBER 2021

"LAST CALL FOR 2021 VISION BENEFITS AND FSA"

Two Weeks 'til 2022!

Remember your Vision Benefits and Flex Spending Accounts

Check your time and nearly full, our time of application is probably for hours, visiting our website for details, and I would like to help. I understand you can schedule call for an appointment additional visits available, too, soon up.


In Other News:

1. Don't forget to check your eye care benefits with your HSA/Health Savings Account or FSA (Flexible Spending Account) if you don't see appointments with regularity. Remember you have time until 12/31/21 to use your HSA/FSA. It's a deadline. Depending on your insurance plan, your benefits may only apply to your current employer. Contact us for more information and we'll be happy to help you with any questions. Appointment only by order of the provider for the safety of our patients and staff. We will be closed Thanksgiving Day, Thursday, Nov. 25th and next week.
2. Don't forget to check your eye care benefits with your HSA/Health Savings Account or FSA (Flexible Spending Account) if you don't see appointments with regularity. Remember you have time until 12/31/21 to use your HSA/FSA. It's a deadline. Depending on your insurance plan, your benefits may only apply to your current employer. Contact us for more information and we'll be happy to help you with any questions. Appointment only by order of the provider for the safety of our patients and staff. We will be closed Thanksgiving Day, Thursday, Nov. 25th and next week.
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Call, text or email today to schedule an appointment.

Thank you!

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HELMUS OPTOMETRY

The Entire Heimus Optometry Team is Vaccinated!

MARCH 2021

"IF YOU SKIPPED YOUR 2020 EYE EXAM, YOU'RE OVER-DUE!"

Remember to keep your eye care benefits up to date. You have time until 12/31/21 to use your HSA/FSA. It's a deadline. Depending on your insurance plan, your benefits may only apply to your current employer. Contact us for more information and we'll be happy to help you with any questions. Appointment only by order of the provider for the safety of our patients and staff. We will be closed Thanksgiving Day, Thursday, Nov. 25th and next week.

Call, text or email today to schedule an appointment.


Thank you!

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HELMUS OPTOMETRY

Sunny Updates from Your Locally Owned Optometry Clinic:

PUT SOME SPRING IN YOUR STYLE



1. Book an Eye Exam: There are the many reasons to get an eye exam and this is one of them. Book your appointment today.
2. Check Contact Lens Status: Contact lenses are an important part of your vision and we want to make sure you have the right lenses for your lifestyle.
3. Book a Refraction: A refraction is a test to determine your eyesight and we want to make sure you have the right prescription for your eyes.
4. New Contact Lenses: Contact lenses are an important part of your vision and we want to make sure you have the right lenses for your lifestyle.
5. We Offer Contact Lens: We offer contact lenses for all ages and we want to make sure you have the right lenses for your lifestyle.
6. Book a Refraction: A refraction is a test to determine your eyesight and we want to make sure you have the right prescription for your eyes.

[Book Your Appointment](#)


FEBRUARY 2022

**“36 YEARS STRONG:
HOW WE’RE STAYING
CURRENT AND
COMMITTED TO EYE
CARE EXCELLENCE”**

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HELMUS OPTOMETRY

Appointments Available Before the Holiday Weekend!



Helmus Optometry will be closed for Memorial Day on Monday, May 30th. We will reopen on Tuesday, May 31st at 8:00 AM.

Have a fun and safe holiday!
The Helmus Family

[Book Your Appointment](#)


MAY 2022

**“MEMORIAL DAY
SHUT EYE”**

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HELMUS OPTOMETRY

May You Love What You See



Shop Local & Independent

At Helmus Optometry, we are committed to providing you with the best eye care possible. We are a locally owned and operated business, and we want to make sure you have the best experience possible. We offer a wide range of services, including eye exams, contact lens fittings, and more. We are committed to providing you with the best care possible, and we want to make sure you have the best experience possible.

[Book Your Appointment](#)


JUNE 2022

**“BOOK YOUR EYE
EXAM AHEAD OF
SUMMER BREAK”**

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HELMUS OPTOMETRY

Schedule now before the year-end rush!



Sizzling September is here!

Don't lose sight of HSA or FSA deadlines; schedule your annual eye exam as we Fall back into routine.

[Book Your Appointment](#)

SEPTEMBER 2022

**“THE HEAT IS ON!
ONLY FOUR MONTHS
LEFT IN 2022”**

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EVENT IDEAS

- Health Fair
- Frame Shows
- Singles Events
- Art night
- Host Ophthalmologists
- Host PCPs

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APRIL 9, 2022

DBA HEALTH & WELLNESS FAIR

Sponsored By

HELMUS OPTOMETRY | SPORTS DERMATOLOGY SKIN AND LASER CENTER

COMMUNITY ENGAGEMENT

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FRAME SHOWS

AKA "DESIGNER EYEWEAR TRUNK SHOW"

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WHY DO PATIENTS ATTEND A TRUNK SHOW?

- for the "exclusivity" of the event
- to get a good deal
- to see more options: colors, sizes, styles
- to try on a lot of different styles
- because they like you and want to support you

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30% off Frames & Lenses

*Not available if using insurance coverage

Featuring French frame lines Lafont & More!
Every model and color available to try on

Save on frames & lenses!
Win Prizes!
Enjoy Refreshments!

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FRAME SHOW: PREPARATION

- Hold event during a historically "slow" time
- Schedule with 1-2 frame reps
- Get the staff excited (uniforms/costumes consistent w/ theme)
- Have a packed Doctor schedule
- Focus on optical patients
- Get the word out about the event at least: **1 month before**
- Get vendor support
- Ask neighboring businesses to donate door prizes or offer services

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FRAME SHOW: ADVERTISING

- Event fliers in each exam lane one-month prior
- Place flyers and signage at highly visible spots in the office
- Instruct staff to extend invitation to each patient
- Write a short script for staff when scheduling appointments or checking out
- Promote show online
- Email campaign
- Invite staff friends and family
- Reach out to targeted groups: women's running club, etc.
- Radio/print ad

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FRAME SHOW: PHYSICAL SET-UP

- Make the place look festive:
 - Balloons
 - Music
 - Flowers/decor
- Refreshments/snacks
- Bring in extra surfaces (tables) so the showcase collection can be displayed in full
- Have a separate area set aside away from festivities to discuss lens selections, insurance and payment



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FRAME SHOW: PROMOTION IDEAS

Consider: no insurance accepted that day?

*Discounts cannot be combined with insurance

BOGO Half-Off

30% off complete purchase

30% off frames

Free AR Coating with complete purchase

Nuances:

1. discounts and insurance restrictions should be plainly stated in all advertisement to avoid complications or misunderstandings on the day of the event
2. If patient schedules an eye exam at the trunk show, honor the trunk show discount

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FRAME SHOW: REAL-WORLD EXAMPLES

- Springtime in Paris (Sat 9 – 1)
- Roaring Twenties (Thurs 2:30-6:30 PM)
- Tropic Like It's Hot (Sat 9 – 2)
- Fall MJ+RB (Thurs 9-12)

Helmus Optometry invites you to a **Designer Eyewear Trunk Show** Featuring:

Marc Jacobs *Ray-Ban*

Thursday, November 7
9:00 AM - 12:00 PM

Every model and color available

30% off select frames and lenses*
Free Anti-Glare with complete purchase*
Refreshments and raffle!

Helmus Optometry
355 2nd St, Davis CA
(530) 758-0122
www.helmusoptometry.com

*Discount cannot be combined with insurance coverage. Lens discount only applicable with purchase of frame on event day.

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HELMUS OPTOMETRY

Brilliant Styles, Beachy Swag & Tangy Bites



Helmus Optometry invites you to a Tropical Oasis Frame Show featuring Maui Jim and Oakley Sunglasses

Saturday April 9, 2022
11:00 AM - 2:00 PM

Make a reservation for this event or contact us for more information. Available Monday, Tuesday, and Wednesday.
Reservations: 530-758-0122
Event: 530-758-0122

Costumes, Cider and Styles!



Helmus Optometry invites you to a Roaring Twenties Frame Show

Thursday October 28, 2021
2:30 - 6:30 PM

355 2nd St, Suite A
(the spacious upstairs Pileas Studio)

*Event subject to rescheduling without notice. Closures optional. Items to attend? Closures these dates appointments possible. In-store. Friday, Schedule your before the year-end sale!

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FRAME SHOW: AFTERMATH

Announcements contest winners online

Share the best pictures of the event

It may be necessary to briefly delay routine patient flow the day after to allow the staff to place orders

A few weeks after, schedule a staff meeting to review every aspect of the event

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“YOU'RE THE PRACTICE THAT HAS THE TRUNK SHOW”

WELL-EXECUTED TRUNK SHOWS HAVE THE LONG-TERM BENEFIT OF RAISING YOUR PRACTICE'S PROFILE IN THE COMMUNITY

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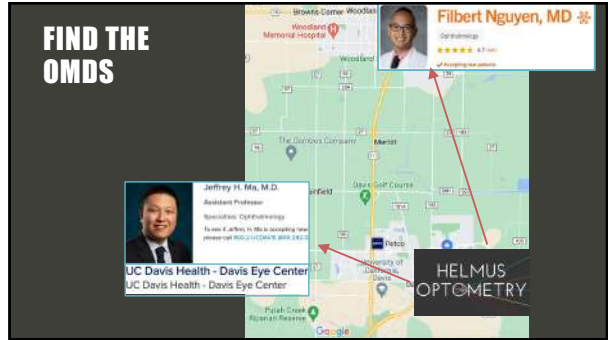


COFFEE LUNCH COFFEE

ALANA MULLER IS A SPEAKER, BUSINESS RELATIONSHIP COACH IN KANSAS CITY AND AUTHOR OF THE BOOK, COFFEE LUNCH COFFEE: A PRACTICAL FIELD GUIDE FOR MASTER NETWORKING

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FIND THE OMS



Filbert Nguyen, MD
Ophthalmologist
Woodland Memorial Hospital

Jeffrey H. Ma, M.D.
Assistant Professor
UC Davis Health - Davis Eye Center

HELMUS OPTOMETRY

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EXAM REPORTS/ REFERRAL LETTERS

An excellent opportunity!

- Ophthalmologists
- PCPs
- Endocrinologists
- Pediatricians
- Physical Therapists



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PUBLIC SPEAKING


- SENIOR CENTERS
- ROTARY
- LIONS
- KIWANIS
- PARENT-TEACHER ASSOCIATION (PTA)

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SENIOR CENTER CIRCUIT

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DIXON SENIOR CALENDAR MARCH 2022

SENIOR/MULTI-USE CENTER
200 S. FIFTH STREET DIXON, CA 95620
OFFICE PHONE: (209) 398-7022
HOURS: MONDAY - FRIDAY 9:00 A.M. - 2:30 P.M.

Our doors are open and we are offering limited activities at this time. We are excited to welcome you back but also want to ensure a safe environment for members of our community. All unvaccinated guests who enter the building must wear a mask. The City of Dixon reserves the right to modify programming based on public health guidance.

CHAIR YOGA CLASS Mondays & Thursdays March 7 - 31 10:30 - 11:30 a.m. First Class is FREE! 10 Class Pass - \$75 1 Class Pass - \$40 Passes do not expire and can be purchased at class. The instructor is: Paradee . Participants stay in a chair or stand.	BUSY BEE'S SEWING & CRAFTS CIRCLE Mondays 10:00 - 11:00 a.m. Craft and Chat! We will be working on Spring wreaths in March.	DRY EYE DISCUSS with Dr. Julie Helmus FREE PRESENTATION Tuesday, March 2 at 10:00 a.m. Dry eye is one of the most common concerns expressed by eye doctors. See Page 4 for info. Seating is limited. Free coffee, tea and water. Unvaccinated guests must wear a mask and socially distance.
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See What You're Missing!

Helmus Optometry
specializes in care for
the aging eye.

- Glaucoma
- Dry Eyes
- Macular Degeneration
- Multi-Focal Contact Lenses

Call Today! 530.758.2122
Downtown Davis Since 1986

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ROTARY

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"THROUGH THE LENS OF A DAVIS BUSINESSWOMAN"

Davis Rotary Newsletter May 9, 2022

CERTIFICATE OF APPRECIATION
Presented to
Dr. Julie Helmus
for her service to the community.

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PODCAST

JUNE 8 • EPISODE 3 • 32 MIN

Episode 3 - "Dr. Julie Helmus, the Optometrist!"

What do u want to be when u grow up?!

Play

<https://podcasts.apple.com/us/podcast/what-do-u-want-to-be-when-u-grow-up/id1625373133>

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PODCAST

Even though Dr. Julie's parents were both optometrists, and founded Helmus Optometry, she never felt pressured to pursue it as a career. It was only after completing her studies and experimenting with several different jobs and interests, that Dr. Julie decided to go back to school, become an optometrist, and take over the family business. Today on the show, Katie speaks with Dr. Julie about owning a small business, being an optometrist, and why she loves serving in her hometown. Dr. Julie describes what it was like studying to be an optometrist, and why being a slightly older student helped her connect with faculty members and get an added level of value out of her training. Tuning in you'll hear about Dr. Julie's typical day as a business owner and an optometrist, and why she makes an effort to be extra alert on days when she's seeing patients. She also reflects on how optometry has become much more medicalized since her parents' time and explains how she helps various patients with medical conditions like glaucoma and dry eyes. To learn more about Dr. Julie's work, as well as her advice for young people who want to pursue optometry as an option, join us today!

Key Points From This Episode:

- An introduction to today's guest: Dr. Julie.
- How Dr. Julie's parent's founded Helmus Optometry.
- Why Julie never felt pressured to become an optometrist.

Apple Podcasts
Spotify
Google
Amazon
iHeartRadio

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VOLUNTEERISM

- Public speaking
- Vision Screenings
- Rotary
- Women in Optometry
- Optometry Divas
- Chamber of Commerce
- Board of Directors
- Special Olympics
- Lions in Sight
- PTA

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SPONSORSHIPS/DONATIONS

- Sports Teams
- Schools
- Causes

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STRATEGIC LOCAL ALLIANCES

- Big employers in the area
- Journalists
- Influencers (UGH)
- Local businesses that share your clientele:
 - Hairdressers
 - Cosmetic Dermatologists
 - Realtors



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OLD SCHOOL

- POST CARDS
- RECALL CALLS
- THANK YOU CARDS
- THANK YOU CALLS
- SWAG

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IN-HOUSE CLUBS

-  Loyalty Club: 10-, 20-, and 30-Plus Years with the Practice
-  BFF Club (Best Friends and Families)

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REVIEWS


- Inescapable: Yelp, Google, Facebook, Indeed
- You can't please them all, but you can (and must) respond to them all: social proof
- Average 4.7 reviews feel more real
- All 5 stars suspicious



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HOW TO RESPOND TO BAD REVIEWS:

- Begin with gratitude: "thank you for this feedback"
- Empathize: "that sounds frustrating, I would be upset too"
- Take the high road
- Acknowledge and apologize using their own words
- Offer a solution: "I would love to help resolve this situation; we look forward to making this right."
- Implement the solution



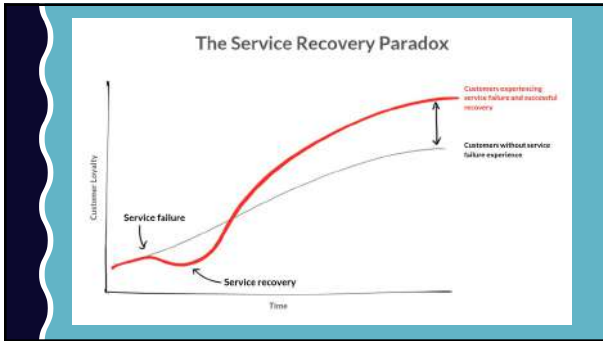
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CUSTOMER SATISFACTION

According to the American Customer Satisfaction Index (ACSI): customer satisfaction is way down - at a 17-year low

76% of customers will quit going to a business based on one bad experience

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WHAT IS THE #1 COMPLAINT?

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COMMON COMPLAINTS

OD OFFICES:	OMD OFFICES:
<ul style="list-style-type: none"> - Front desk staff - Unsuccessful Adjustments - "Undisclosed" fees - Glasses take too long 	<ul style="list-style-type: none"> - Like a factory - I'm just a number - Long appointment times - Poor bedside manner


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DELIVERING EXCELLENT CUSTOMER SERVICE

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NOT JUST AN EYE EXAM

IT'S A "PATIENT EXPERIENCE"



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DELIGHT?

- Goal: build engagement and loyalty
- People remember moments, not days
- "The first act of love is to listen"
- Patient's throw the bait, so grab it!
"You're creating a moment, which creates a memory, which makes them talk about you"

WE MUST:

1. Meet their needs
2. Remove the effort (make it easy!)
3. Add delight

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CLINIC CULTURE

"Patients don't care how much you know until they know how much you care."

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MEMORABLE MOMENTS

- Arrivals
- Transitions
- Peaks
- Valleys
- Endings

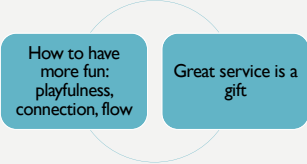


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TAKE AWAY

How to have more fun: playfulness, connection, flow

Great service is a gift



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THE ASK

REFERRALS AND REVIEWS

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CONCLUSION

Make community outreach a **continuous** part of your effort and you will create a steady stream of **new relationships** and **brand awareness** that will keep you **growing** until you become a permanent beloved fixture in your **local community**



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THANK YOU!

DR.JULIE.HELMUS@HELMUSOPTOMETRY.COM

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VISION EXPO HAS GONE GREEN!

We have eliminated all paper session evaluation forms. Please be sure to complete your electronic session evaluations online when you login to request your CE Letter for each course you attended!

Your feedback is important to us as our Conference Advisory Board considers content and speakers for future meetings to provide you with the best education possible.

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REFERENCES

Barbara Khozam, Customer Service Speaker

Simon Sinek, "Know the Game You're Playing"

Catherine Price, "Why Having Fun is the Secret to a Healthier Life, TED TALK:
<https://www.youtube.com/watch?v=iMB1ryFvv8s>

[BusinessWire ACSJ](#)