



# *EyeSystems*



- *Mary E. Schmidt, ABOC, CPO*
- *Mary@EyeSystems.info*
- *www.EyeSystems.info*

*No audio or video recording permitted*

**On behalf of Vision Expo, we sincerely thank you for being with us this year.**

---

### **Vision Expo Has Gone Green!**

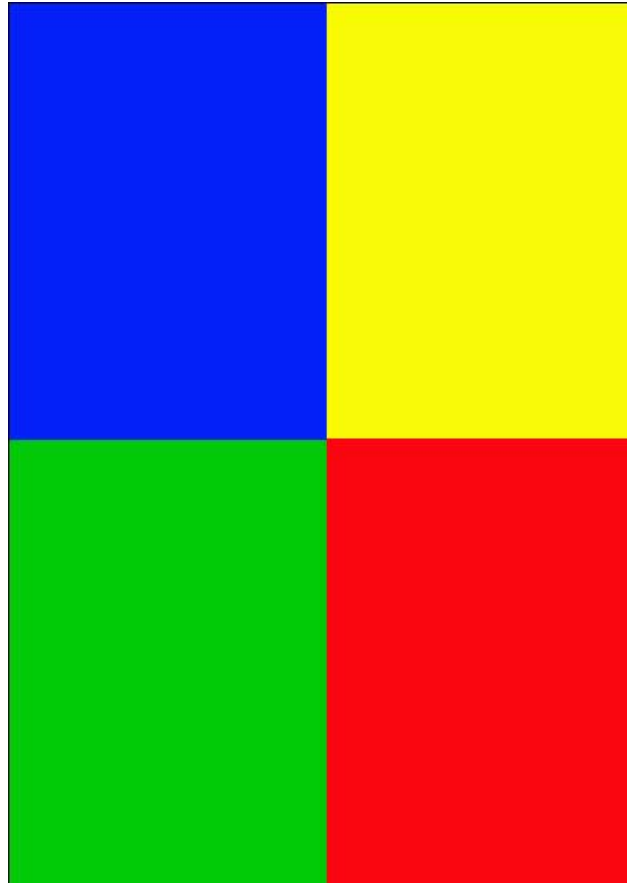
We have eliminated all paper session evaluation forms. Please be sure to complete your electronic session evaluations online when you login to request your CE Letter for each course you attended! Your feedback is important to us as our Education Planning Committee considers content and speakers for future meetings to provide you with the best education possible.



Mary E. Schmidt has no financial interests to disclose.

**WORDS MATTER.**  
Choose them wisely!

# Look at Yourself First



- Lamb - Green
  - Want to please
- Cheerleader – Yellow
  - Looking for fun
- Warrior – Red
  - Not afraid of a fight
- Human Computer – Blue
  - Wants facts and data

# Look at Your Patient

- Same personality mix
- “Karen’s” or “Ken’s”
- Behavior changes with position
  - Front – Gate keepers
  - Assistants – Helpers
  - Opticians – Partners
  - Doctors – Authority



# Consider

- Appearance
- Non-verbal cues
- Motivation –
  - Your personality type
- Word choices
- Tone
- Ultimate goal



# Optometric Receptionist





# Scenario - Front

- Why can we only order up to the expiration date of our contact lenses?
- “Contact lenses are based on a prescription. Just like a medication from your medical doctor. If they prescribe 25 antibiotics pills, you don’t get 50 just because you want them. The directions are based on your needs. Same thing with contact lenses, each year we need to confirm the prescription is accurate and make sure your eyes are healthy.”

# Scenario - Front

- When a patient declines services.
  - Make sure you are explaining the value of the test, how it impacts the patient and why the doctor believes it is important. **Avoid saying your insurance doesn't this, do you still want it done?**
  - “Our doctors recommend, INSERT TEST, because it will INSERT WHY. Unfortunately, not all insurance companies are up to date on technology, thankfully the fee to you would only be \$49.”

# Scenario - Front

- Patient wants to speak directly to the doctor.
  - “I’m sorry, the doctor is unavailable, may I take a message?”

It is important that you follow up and make sure the doctor receives the message and you or the doctor respond promptly if warranted.

Sometimes the patient just needs an appointment!

# Scenario - Front

- Explaining the “No Show” fee
  - “In the event you are not able to keep this scheduled appointment, we do request 48 hours notice prior to the appointment time. You may incur a \$50 fee if the appointment is missed. Obviously if there is a life-or-death emergency, please contact us and we will be happy to work with you.”

# Scenario - Front

- When patients owe a fee after insurance is billed, “why didn’t you collect that while I was in the office?”
- “I apologize for the confusion. Not all insurance coverage is the same. We will only know the final balance once your insurance company has reviewed your claim and given us their decision.”

# Scenario - Front

- When a patient is late and staff needs to check with the doctor...the patient asks, “You might see me?”
- Set protocols for this scenario. Any patient who will arrive within 15 minutes of their appointment time will be seen. OR if the appointment slot following their time is open you can allow them a little more time. But if they will arrive in another patient’s appointment time, they will need to be rescheduled. There are always exceptions. Use your judgment.

# Scenario – late patient

- “I am so sorry I have another patient scheduled directly after you and we won’t have time to see both of you. May I have you come in...”
- “Yes, I understand, but I want to make sure you have the time you need with the doctor...”

# Scenario - Front

- Patient not wanting to wear mask or sanitize.
- “I appreciate your frustration (or another appropriate word). Given that we are a medical environment, some of our other patients may be immunocompromised (or at risk). To insure everyone is safe we ask that you adhere to our rules. If you would like to reschedule or book as the last patient of the day, I would be happy to accommodate you.”

Don't squeeze them in – book off into the future if needed



# Scenario - Front

- PPO vs Vision Coverage
  - “Your insurance is a medical plan. That coverage is for the medical portion of an eye exam where we check for diseases and disorders that can harm your vision. Vision insurance covers for the portion of your exam related to the need for glasses or contact lenses.
  - The one or two, one or two portion is vision. The bright lights portion is the internal medical evaluation.”

# Scenario - Front

- Patient wanting refraction only
  - “I understand, but many times the cause of a change in your vision is not just because of a prescription change. It could also be due to medical issues, cataracts, diabetes, medications etc. Our doctors don’t want to overlook a medical condition. It’s critical to us to make sure your vision is great, and your eyes are healthy too. We can even diagnosis conditions like HBP or even some cancers so we’re very thorough.”

# Optometric Assistants



# Scenario - Assistants

- When a patient fails the Ishihara or color test.
  - “The doctor will discuss the findings in detail with you and answer all your questions.”
  - “I’ll defer to the doctor to answer your questions.”
  - “There are multiple correct answers, the doctor will evaluate your eyes and discuss what is right for you.”

# Scenario - Assistant

- How to respond to rude patients.
  - Be proactive! Read the patient – mirror their personality.
    - Always introduce yourself – make a connection.
    - Look them in the eye.
    - Make a clear and authoritative statement.
      - “Please come right this way with me and I will begin your exam.”
    - Be aware of your body language.
    - Report any excessive bad behavior to the doctor.

# Scenario - Assistants

- Patient's refusing pre-testing.
  - Again, be proactive – prevent problems by your actions.
  - Be aware of patient caution or fears – reassure them, educate them on each tests, how and why it is being done.
  - This is not a choice this is the doctor's requirement.

# Scenario - Assistants

- Explaining why VSP doesn't cover myopia fitting or maintenance.
  - *Do YOU understand why VSP doesn't cover this?*
  - *This is a negotiated benefit between their employer and VSP.*
  - "Our doctors' recommendations are based on what they believe is best for your eyes and your vision. Vision plans focus on what MOST people need and provide coverages for that. Your situation is unique and may not be covered."

# Scenario - Assistants

- Why they must pay a fee for INSERT SERVICE HERE when they didn't have to pay that in the previous years.
- This varies by practice – brainstorm as a team. Often the patient has paid the fee in the past and just needs a refresher. Be patient and polite.



# Scenario - Assistants

- Summarizing patient chief complaints, history when there is a lot or complicated information. What should we put in the notes? How would the doctors like us to proceed?
- *This is a situation to discuss with the doctors and create plan. Again, brainstorm as a team...*

# Scenario - Assistants

- Taking an Optomap image (or any procedure) for a patient who is a heavy blinker or can't hold their eye wide open even with help from an assistant.
- *Training and repetition and experience are needed. This is something the team can strategize and train for better results.*

# Optician



# Scenario - Optician

- When will my glasses be ready?
  - Be proactive! Tell them before they ask.
  - “OK, it looks like we have all the details we need to get started. The lab will receive your frame tomorrow, hopefully they can begin immediately, (don’t say this on a Friday). The process usually takes about 10 business days. The lab will return the completed glasses to us, we’ll inspect and confirm everything is made accurately and then will call to schedule a time for you to pick them up.”

At this point I pull out a small calendar and count off the days to give them an estimated time of arrival. Give yourself a small extra cushion!

# Scenario - Optician

- Can I have a discount?
  - What is your discount policy?
    - 3 pair expectation
    - 10 pair purchased at once
    - Dollar amount
    - Age – over 60 years old? College student?  
Military?

# Scenario - Optician

- Why are you more expensive than...?
  - “We pride ourselves on offering only the highest quality products. Just like anything quality can vary, shoes, cars, food...we feel very strongly that glasses should be well made, comfortable and last, and that costs more.”
  - “Our team is very experienced, and many have their professional certification, which means our skills and knowledge are well above average.”

# Scenario – Optician

- Verbiage to step away from patients to dispense to another patient.
- *Make sure you acknowledge the other patient, and your current patient is aware someone else is also needing your attention.*
- “Let me give you a few minutes to review, consider, revisit these frames. (May) I will step away for a moment to help Jeff with his glasses and then I will be right back to you.”

# Scenario - Optician

- Is there anyone else who can help me, I've been waiting a long time?
  - Does this happen often? When? Can you adapt staffing levels? Can front desk monitor wait times or set expectation levels? Can you schedule patients versus walk in?
  - Once a patient experiences this it is difficult to recover. Prevention is the goal!
  - Apologize and find someone as quickly as possible.



# Scenario - Optician

- Why do I need to sign a POF waiver when I bought the frame here?
- “Oh gosh, these frames are two years old now. They’ve been through some/a lot of wear and tear. Putting new lenses in a frame can stress the material and because the frame is older there is more risk. By signing the form, we both confirm that we are aware that the frame may break. Obviously, the lab is careful, but you are taking a risk using an older frame. Are you OK with that?”

# Scenario - Optician

- Why are frames so expensive? Do you price match?
  - “It’s all about quality materials. I can get a pair of shoes at Target or Nordstrom, are they the same? A \$15 dollar hamburger or a \$2 burger? Are they the same? (use any examples you think are relevant to the patient, cars, paint, real estate). Because is it difficult to compare apples to apples in eye wear, we set a fair price and do not price match other provider prices. They could be knockoff/counterfeit, etc., so we just avoid the problem.”

# Scenario - Opticians

- Price is different, online, at brand websites or outside sites.
- “Isn’t it interesting how overhead costs can impact pricing? Costco is so different from Nordstrom and the pricing reflects it. Volume purchasing, real estate costs, convenience. We strive to give our patients an individualized, quality experience and we feel our pricing is fair for the quality and convenience we offer.”

# Scenario - Optician

- Why don't you carry Ray Ban (or any brand)?
  - "We try to offer unique and sometimes one-of-a-kind items for our clients. If products are carried at major retailers, I don't want to offer you that same option, they are already doing it. We want you to have a variety of choices, not just the same thing everyone else carries. Can I show you something special?"

# Scenario - Optician

- Why is there such a big turnover of employees? Patient's want to see familiar faces.
- “We constantly strive to find the right mix of team members. Sometimes changes are necessary, but I can say many of the changes are due to our employees taking the next step professionally. Many of our employees go on to nursing or optometry school. And we're proud of that!”

# Scenario - Optician

- Patient who arrive last minute and take a long time.
- This is a reality of retail. If you don't have the time to spend with the patient, try to schedule them at a better time. But sometimes you just must take a deep breath and see it through.

# Conclusion

- What is your objective?
  - Help them
  - Solve their issue/problem
  - Advocate for patient
- How will they know this?
  - How you look
  - How you sound
  - The words you choose
  - Should we take videos?

