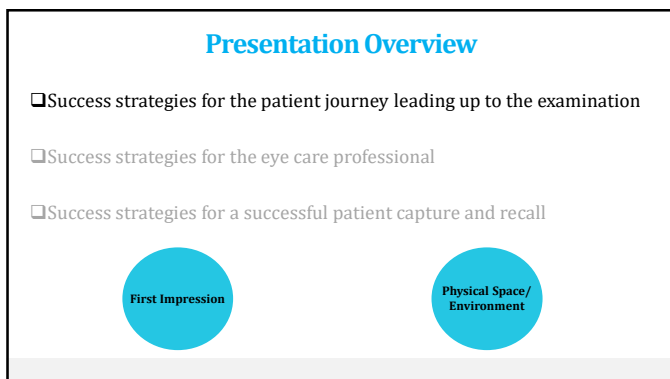


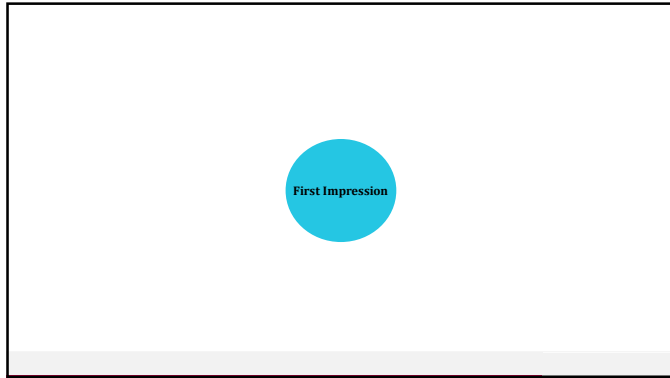
Presentation Overview

- ☐ Success strategies for the patient journey leading up to the examination
- ☐ Success strategies for the eye care professional
- ☐ Success strategies for a successful patient capture and recall

	SILENT GEN	BABY BOOMERS	GEN X	MILLENNIAL	GEN Z
Ages	73 and older	72 – 54	53 – 42	41 – 23	22 and younger
Major Events	Great Depression Pearl Harbor WW II	Civil rights Women's liberation Cold War	Watergate Advent of MTV	AIDS Technology	9/11 Iraq / Afghanistan Wars Market crash
Major Traits	Hard working Loyal Respect authority	Explore Optimistic Work-centric	Individualistic Flexible Skeptical	Tech-dependent Family-centric Optimistic	Political mistrust Always connected Multi-taskers







Step One: The First Impression

The first impression happens well before optometry practice owners even know it...



Step One: The First Impression

www.yourwebsite.com




How Else??



2020 And Beyond Marketing Evolutions

Website content and design is the new
"thang"
Trumps S.E.O., etc

Two Factors to Capitalize Upon
Social Experience
Time/Speed/Efficiency

Business to Consumer (B2C) trumps
Business to Business (B2B)

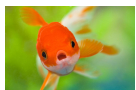


2021 Marketing Evolution
#DYKs

#DYK

The average attention span of the
modern-day consumer is only
7 seconds...

That's one second shorter than a
goldfish



#DYK

Business to Consumer
influential marketing
generates \$6.50 for every
\$1 invested

This is 11 (eleven) times
the ROI of traditional,
antiquated forms of
marketing

#DYK

Globally, more people have a
cell phone than have a
toothbrush

Makes me grateful I chose
optometry...



Dr. G Success Pearls

- ✓ Diversify your digital portfolio
- ✓ Accommodate all targeted demographics' preferences
- ✓ Trust the Experts



Revise Your Digital Platform And Presence

Silents (Born 1945+)



#DYK

Posting a video of yourself increases your chances of converting a prospective Silent by 60%

Include a video of you on your website

Establish each patient's communication and notification preferences and document in both EMR system and manual patient file

Never assume
Set as automatic pop up on EMR

Avoid automatic phone reminder systems

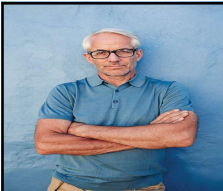
Emphasize safety and protection of their personal information

Provide them with a business card and your cell number on the back

Assurance that you are there for them
Substitute for social media

Revise Your Digital Platform And Presence

Baby Boomers (Born 1946-1964)



Keep in Mind...

As of 2020, there are 11 million more consumers over age 60, while the share of spending among younger consumers is expected to decline over the next 10 years

73 percent of 50 to 59 year olds own and use a smart phone

54 percent of 60 to 69 years olds own and use a smart phone

Optimize the patient experience on your website
FAQs

Live Chat Service and/or
Virtual Chat Assistant
More Info = Better

Emphasize/Highlight Positive
Customer Reviews

Target Marketing with
Emphasis on Facebook

#DYK

Less than 1/3rd of Baby Boomers find shopping in person relaxing

#DYK

Baby Boomers place 'immense value' on online reviews before checking out a new business in person

#DYK

There are more Facebook users from the 65 and above age group than those in the 13 to 17 year-old group

Preferred modality is laptop or PC (67%)

Revise Your Digital Platform and Presence

Gen X'ers (Born 1965-1976)

Optimize transparency on website and social media

Pricing

Path to service or product

Emphasize/Educate on quality and unique attributes of your services and products

Prioritize email communication

Email Marketing Campaigns

'Guilty until proven innocent' generation



#DYK

Gen Xers (86 percent) are the most likely generation to stay loyal to their retailers/brands they've shopped at in the past

Preferred modality of communication is the Laptop or PC (67%) but 60% of Gen X'ers use their smartphone for shopping as well

Revise Your Digital Platform and Presence

Millennials (Born 1977-1995)

Invest and engage regularly in social media

All platforms

Emphasis on Facebook>Instagram

Emphasize authenticity in your services and style in your eyewear and other products

Rally behind/support social causes

Advertise this on website/social media

Prioritize discounts and 'deals' on your website and social media

Millennials are more likely to buy on their smartphones (43%) than the rest of the population (28%)



#DYK

Millennials are 50% more likely to purchase from a company that supports a cause

#DYK

62% of millennials say that if a brand engages with them on social networks, they are more likely to become a loyal customer

#DYK

Two-thirds of millennials say they will switch brands if they are offered a discount of 30% or more

Revise Your Digital Platform And Presence

Gen Z'ers (Born 1996-Present)

Invest and engage regularly in social media

Emphasis on Instagram>TikTok>YouTube>SnapChat

Prioritize organic, authentic posts on website and social media

Rally behind/support social and economic causes

Advertise this on website/social media

Optimize efficiency of navigation and speed of website and social media outlets

#DYK

80% of purchases by this generation is influenced by social media

#DYK

77% of Gen Z prefer ads that show real people in real situations

#DYK

51% of Gen Z says the most important thing while shopping is to find things quickly

#DYK

If an app or website is too slow over 60% say they will not use it

Preferred modality is the phone, the phone and the phone



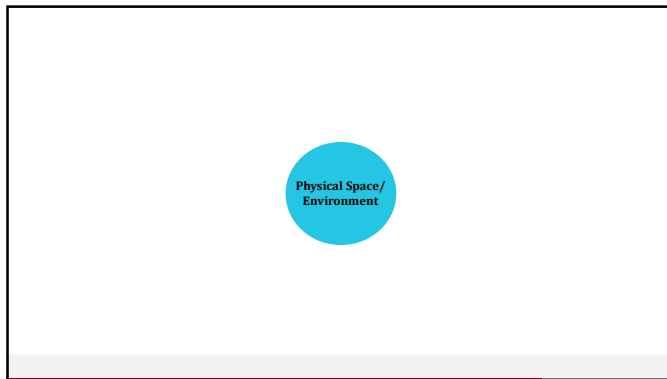
What about the in-store preference??

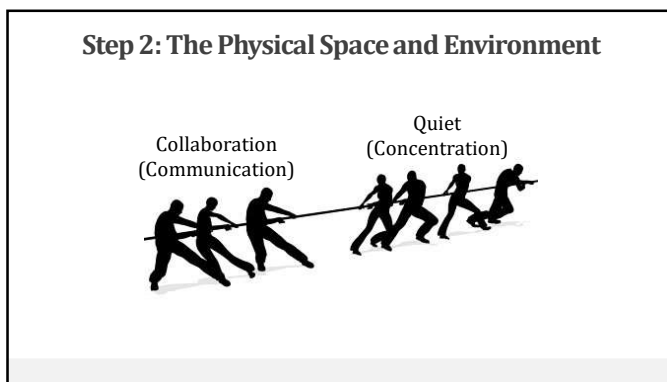
Best of both worlds


Shop online

Purchase in store with the brand that 'wins 1st prize'

54% say they are looking for products that are environmentally sustainable, but only 38% said they were willing to pay a premium for them



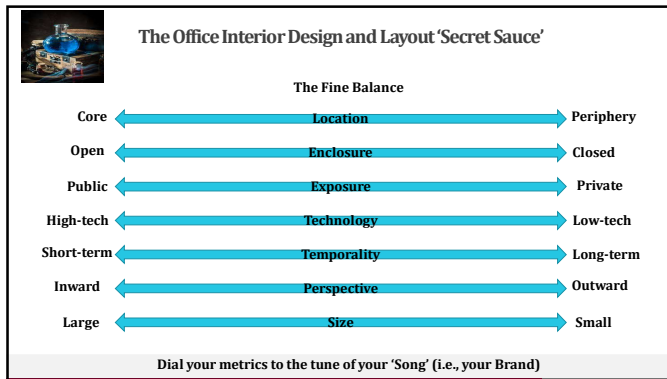


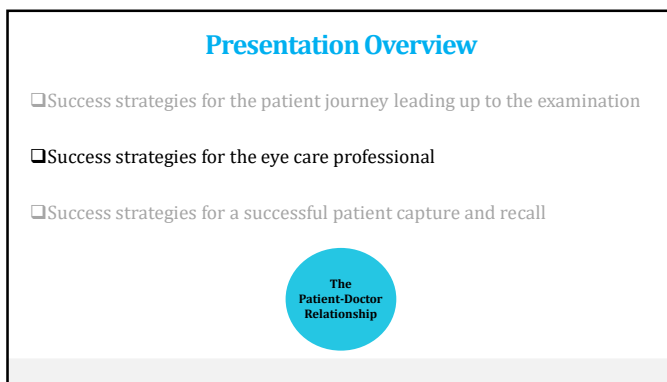


Harvard Business Review

The 7 Factors of Great Office Design

- Location**
The degree to which the space is accessible
- Enclosure**
The degree to which the space is enclosed by walls, doors, or a ceiling
- Exposure**
The degree to which the space offers visual or acoustic privacy
- Technology**
The degree to which the space is outfitted with high-tech or low-tech tools
- Temporality**
The degree to which the space invites lingering
- Perspective**
The direction in which the space focuses the user's attention
- Size**
The usable square footage of the space





Step 3: The Patient-Doctor Relationship

Four Models of the Physician-Patient Relationship

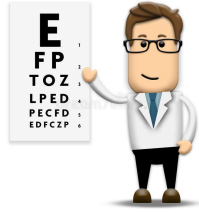
Emanuel, E., Emanuel, L. (2016). The Four Models of the Physician-Patient Relationship. Retrieved from: https://www.unlv.edu/sites/default/files/story_attachments/1111/11.0

JAMA
The Journal of the American Medical Association

Cleveland Clinic

The Four Models

- ☐ The Informative Model
- ☐ The Interpretive Model
- ☐ The Deliberative Model
- ☐ The Paternalistic Model



The Informative Model

"Scientific, Engineering or Consumer Model"

Objective(s)

Physician to provide the patient with all relevant information
 Patient to select the medical interventions he or she wants
 Physician to execute the selected interventions

Assumption

Fairly clear distinction between facts and values

Application

No role for the physician's values, the physician's understanding of the patient's values, or his/her judgement of the worth of the patient's values

The Interpretive Model

"Counselor Model"

Objective(s)

To elucidate the patient's values and what he or she actually wants
 To help the patient select the available medical interventions that realize these values
 Physician provides the patient with information on the nature of the condition and the risks and benefits of possible interventions
 Physician assists the patient in elucidating and articulating his or her values and in determining what medical interventions best realize the specified values

Assumption

The patient's values are not necessarily fixed and known to the patient

Application

The physician must elucidate and make coherent these values
 The physician works with the patient to reconstruct the patient's goals and aspirations, commitments and character

The Deliberative Model

"Teacher or Friend Model"

Objective(s)

Help the patient determine and choose the best health-related values that can be realized in the clinical situation

Assumption

The patient is empowered not simply to follow unexamined preferences or examined values, but to consider, through dialogue, alternative health-related values, their worthiness, and their implications for treatment

Application

Physician must delineate information on the patient's clinical situation and then help elucidate the types of values embodied in the available options
May include suggestions by physician on why certain health related values are more worthy

The Paternalistic Model

"Parental or Priestly Model"

Objective(s)

The physician uses their skills to determine the patient's medical condition and his or her stage in the disease process and identifies the medical tests and treatments most likely to restore the patient's health or ameliorate pain

Assumption

There are shared objective criteria for determining what is best
Patient will be thankful for decisions made by the physician even if he or she would not agree to them at the time

Application

Physician can discern what is in the patient's best interest with limited patient participation

Summary of the Four Models

	Informative	Interpretive	Deliberative	Paternalistic
Patient Values	Defined, fixed, and known to patient	Inchoate and conflicting, requiring elucidation	Open to development and revision through moral discussion	Objective and shared by physician and patient
Physician's Obligation	Provide relevant information and implement selected intervention	Elucidating and interpreting relevant patient values as well as informing the patient and implementing the patient's selected intervention	Articulating and persuading the patient of the most admirable values as well as informing the patient and implementing the patient's selected intervention	Promoting the patient's wellbeing independent of the patient's current preferences
Conception of Patient's Autonomy	Choice of, and control over, medical care	Self-understanding relevant to medical care	Moral self-development relevant to medical care	Assenting to objective values
Conception of Physician's Role	Competent technical expert	Counselor or adviser	Friend or teacher	Guardian

Top 10 Personality Profiling Programs of 2021

1. Truity ([truity.com](https://www.truity.com))
2. HIGH5 Test ([HIGH5test.com](https://www.HIGH5test.com))
3. DiSC ([DiscProfile.com](https://www.DiscProfile.com))
4. 16 Personality Factor Questionnaire ([OpenPsychometrics.org](https://www.OpenPsychometrics.org))
5. HEXACO Model of Personality Structure Personality Inventory ([Hexaco.org](https://www.Hexaco.org))
6. Revised NEO Personality Inventory ([Acer.edu.au](https://www.Acer.edu.au))
7. Myers-Briggs Type Indicator ([Myersbriggs.org](https://www.Myersbriggs.org))
8. Eysenck Personality Inventory ([Iluguru.ee](https://www.Iluguru.ee))
9. Eysenck Personality Questionnaire ([SimilarMinds.com](https://www.SimilarMinds.com))
10. Minnesota Multiphasic Personality Inventory ([PearsonClinical.com](https://www.PearsonClinical.com))



BUT I DON'T SELL

AN EYE CARE PROFESSIONAL'S GUIDE
TO STOPPING BEING MORE PERSUASIVE,
INFLUENTIAL AND SUCCESSFUL

STEVE VARGO, OD, MBA

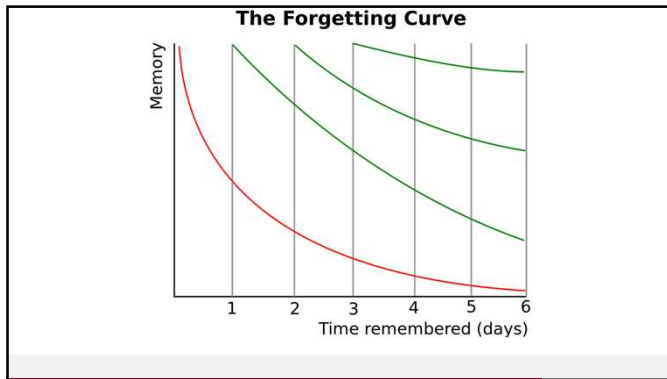
The Forgetting Curve

$$R = e^{-\frac{t}{s}}$$

Memory Retention

Time

Relative Strength of Memory



Patient Education Resources

- ✓ Manual Handouts
- ✓ EMR Auto-Send or Print
- ✓ CRM Auto-Send
- ✓ Air Drop
- ✓ CRM Text Messenger

The Essentialism of Non-Verbal Communication
The Doctor

Smile and maintain appropriate eye contact, but do not stare

Show interest in what the patient is saying and avoid tapping your fingers, gazing out of the window, looking at the clock, yawning, and other nonverbal actions that might indicate that you're bored or in a hurry

Sit when you can, and lean forward to show that you're engaged. Don't stand looking down on the patient in a paternalistic stance

Nod your head to show you are listening

Maintain an open and relaxed posture and avoid crossing your arms or other gestures that might suggest unwillingness to listen, disapproval, or a judgmental attitude. Encourage the patient to share relevant and complete information

Thompson, J. (2011, September 30). Is nonverbal communication a numbers game? *Psychology Today*. Retrieved from www.psychologytoday.com/us/blog/beyond-words/201109/is-nonverbal-communication-numbers-game

The Essentialism of Non-Verbal Communication *The Patient*

Rubbing of the neck
Hands to mouth or lower face
Finger behind ear
Hands behind head
Tension in brow
Lack of eye contact
Fidgeting with hands
Touching or scratching nose
Not facing you directly
Arms and legs crossed
Attaining a higher conversation rate

Segal, J., Smith, M., Boose, G., & Jaffe, J. (2016, April). Nonverbal communication. Retrieved from www.helpguide.org/articles/relationships/nonverbal-communication.htm



A survey of people in the US, Australia, UK and Sweden last year reported that as many as 1 in 3 people have 'fragrance sensitivity'

Across the four countries, 9.5% of the general population, representing 29.1% of fragrance sensitive individuals (49.5% US, 17.1% AU, 25.5% UK, 24.2% SE), report health effects that can be considered disabling

Steinemann, A. International prevalence of fragrance sensitivity. *Air Qual Atmos Health* 12, 891-897 (2019). <https://doi.org/10.1007/s11869-019-00699-4>

The Value of Patient Feedback

- ✓ Improves the patient experience
- ✓ Improves the quality of the care
- ✓ Useful for benchmarking
- ✓ Helps increasing revenue
- ✓ Helps reduce patient leakage and increase patient retention





Practices with higher patient ratings saw a 0.4% increase in net operating profit margin for every one-point increase in rating

Fessler, E. (2020). Patient Experience's Impact on Revenue. Retrieved from:
<https://www.binaryfountain.com/blog/patient-experiences-impact-on-revenue/>

Presentation Overview

- ☐ Success strategies for the patient journey leading up to the examination
- ☐ Success strategies for the eye care professional
- ☐ Success strategies for a successful patient capture and recall





The Value of Technology EMR Systems

- ✓ Enables optometrists to store and retrieve data relating to a patient's health records
- ✓ Enhances the communication of patient information through a legible format that anyone can use
- ✓ Safeguard patient safety
 - Alerts on medications
 - Flags and reminders
 - Consultation and diagnosis reports
- ✓ Can improve provided care for common conditions based on past evidence
- ✓ Can lead to uniformity of practice across all Optometrists

Bouronikos, V. (2020). The Importance of Technology in Healthcare. Retrieved from <https://ied.eu/blog/importance-of-technology-in-healthcare/>

The Value of Technology The Consumer Perspective

Key Trends in Healthcare

- Willingness to disagree with their doctor
- Tracking their health conditions with technology and using that data to make their own decisions
- Accessing and using their medical record data and wanting ownership of it
- Engaging in healthy behavior and prevention

Betts, D. (2020). Are Consumers Already Living the Future of Health? Retrieved from: <https://www2.deloitte.com/us/en/insights/industry/health-care/consumer-health-trends.html>

Key Technologies in Optometry

- ERG Analysis
- Genetic Screening
- Cognitive Screening
- Dark Adaptation
- Intense Pulse Light (IPL) Therapy
- Anti-Oxidant Screening
- Others?

PREVENTION



No Lonely Patients



Patient Wait Times

The average wait time is 20 minutes

Wait times for healthcare services are twice as long as for other service categories

30% of patients feel anxious, frustrated or stressed while waiting for their appointment

Phreesia. (2020). The High Cost of Long Wait Times. Retrieved from: <https://www.phreesia.com/2020/03/05/infographic-the-high-cost-of-long-wait-times/>

The High Costs of Long Wait Times

1 in 5 Patients report that they have switched doctors because of long wait times

30% of patients say that they have left an appointment because of a long wait

Long wait times are one of the key detractors of an optometry practice's Net Promoter Score, a measure of whether patients would recommend them to a family member or friend

96% of patients' online complaints about their doctor relate to customer service issues, such as long wait times



Phreesia. (2020). The High Cost of Long Wait Times. Retrieved from: <https://www.phreesia.com/2020/03/05/infographic-the-high-cost-of-long-wait-times/>



49% of healthcare practices have changed their processes to improve patient wait times

What's your plan?

Phreesia. (2020). The High Cost of Long Wait Times. Retrieved from: <https://www.phreesia.com/2020/03/05/infographic-the-high-cost-of-long-wait-times/>

Strategies to Reduce Wait Times

Pre-Appointment

- Give patients the option to self-schedule appointments online
- Leverage automatic text message and email appointment reminders
- Prompt patients to check in for their appointments ahead of time
- Give patients mobile, tablet and kiosk check-in tools that automatically capture their demographics and medical history and integrate with your HER system
- Automate insurance verification, referrals, and consent management
- Provide time-saving payment options
- Review appointment analytics, front-desk workflows, and patient satisfaction surveys to understand common bottlenecks and areas for practice improvement

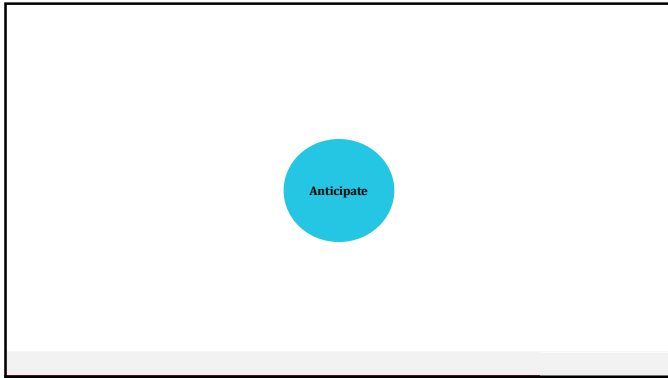
Intra-Appointment

- Verbal check in
- Offer water, coffee, etc
- Encourage eyewear selection

Dr. G Success Pearls

- ✓ Be transparent with patients upon arrival of their expected wait time
- ✓ Keep them updated on when they will be seen at least once if not more





'Selling' At Every Patient Touch

Pre-Appointment

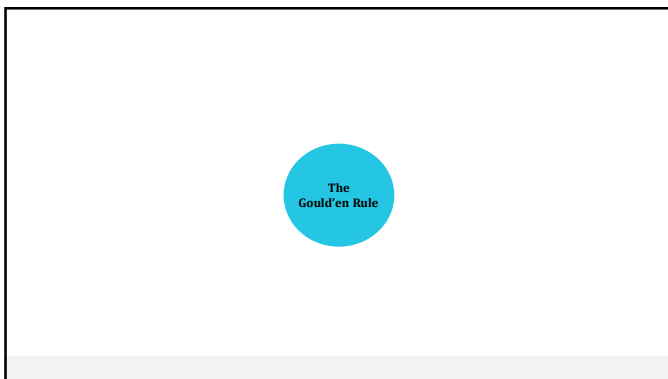
Receptionist Check-In

Technician Work Up

Doctor Exam

Optician Handoff

Receptionist Check Out



The Gould'en Rule





66% of employees say they would leave their job if they didn't feel appreciated or protected
Up significantly from 51% of employees who felt this way in 2012

Among millennials, the number of employees who would leave jumps to 76%

Lipman, V. (2017). Forbes. Retrieved from: <https://www.forbes.com/sites/victorlipman/2017/04/15/66-of-employees-would-quit-if-they-feel-unappreciated/?sh=1800f596897>

Great Leaders Make Employees Feel Safe and Valued

"When employees don't feel safe, they spend all of their energy protecting themselves. They don't take healthy risks, they do the bare minimum, they blame others when things go wrong, and they don't share credit."

- Simon Sinek

"Good behavior that goes unnoticed gradually goes away and bad behavior that goes unnoticed gradually becomes a habit."
- Some Lady on LinkedIn



Key Leadership Strategies

The Do's

- Touch base early and often
- Give balanced feedback
- Address growth opportunities
- Offer flexibility
- Make compliments a habit

The Don'ts

- Expressions of gratitude that are inauthentic or sweeping generalizations
- Neglecting standard company procedures
- Letting employees feel isolated from coworkers or the larger organization
- Sudden or unexplained shifts in your appreciation practices

Gibson, R. (2020). The Little Things That Make Employees Feel Appreciated. Retrieved from: The Little Things That Make Employees Feel Appreciated

Last Impression



Making a Lasting Impact

Thank every customer


Acknowledge and compliment their product and service selections

Ask for any un-answered questions

Solicit feedback to make their experience a 5 Star experience for their next visit

Inquire for an online review and/or referral

"A referral from every client, and a client from every referral."





Solomon Gould, O.D., M.B.A.

 @dr.gould2020

 @solomongould

 Solomon Gould

Thank You!!

Bonus Slides





Which generation is most likely to have researched your business online and is most likely to purchase their eyeglasses directly from you?

- A. Gen Z'ers
- B. Millennials
- C. Gen X'ers
- D. Baby Boomers
- E. Silents





Which generation is most likely to have researched your business online and is least likely to purchase their eyeglasses directly from you?

- A. Gen Z'ers
- B. Millennials
- C. Gen X'ers
- D. Baby Boomers
- E. Silents





Which generation is most likely to have researched your business online, is likely to purchase their eyeglasses directly from you, but has researched your pricing and compared it to your competition?

- A. Gen Z'ers
- B. Millennials
- C. Gen X'ers
- D. Baby Boomers
- E. Silents





Which generation is most likely to have researched your business online but is coming to your office because they want to get a first-hand experience of your business for themselves and are loyal followers if you treat them right?

- A. Gen Z'ers
- B. Millennials
- C. Gen X'ers
- D. Baby Boomers
- E. Silents





Which generation is the most likely to come to your business anticipating and looking for your recommendation for their eyewear?

- A. Gen Z'ers
- B. Millennials
- C. Gen X'ers
- D. Baby Boomers
- E. Silents