


Breaking Practice Barriers

Valerie Manso
valmanso@aol.com

1

1




Financial disclosure

- I Valerie Manso am President of Manso Management Resources, Inc. A consulting company specializing in business and people development in the ophthalmic industry. I currently have ongoing contracts with BluTech Lenses as VP Sales and Education; and PECAA, as Director of Staff Education

2

2



Background

- Every staff member has a critical role to play in the success of the contemporary optometric practice.
- Patient satisfaction and exceeding patient expectations is everyone's role.

3

3

Background

- Whether answering the phone and making the all important first contact with a prospective patient
- Taking the patient history; conducting a quality pre-test; assisting with eyewear selection or ensuring insurance billing is accurate and timely
- You make or break the success of the optometric practice.

4

4

Why change if you're doing well?



5

5

Objectives

1. Have an understanding of the characteristics you should employ to ensure continued practice growth.
2. Be provided several practice enhancing activities you can employ every day
3. Have a clear understanding of how your role in the practice is a critical part of successfully completing the puzzle of business success

6

6

What patients want

- A recent study reaffirmed what every customer knows, but too many leaders continue to bury their head in the sand and ignore what research shows: that a **great experience** not only influences where they chose to buy, but also:
 - 82% of consumers have stopped doing business with a company as a result of a negative experience
 - 55% became the customer of a company because of their reputation for great customer service
 - 40% began purchasing from a competitor simply because of reputation for great customer service
 - 85% of consumers said they would be willing to pay more over the standard price in order to ensure a superior customer experience

John DiJulius – Consultant – Vision Care Venture Blog 2013

7

THE 20/20 EXPERIENCE

8

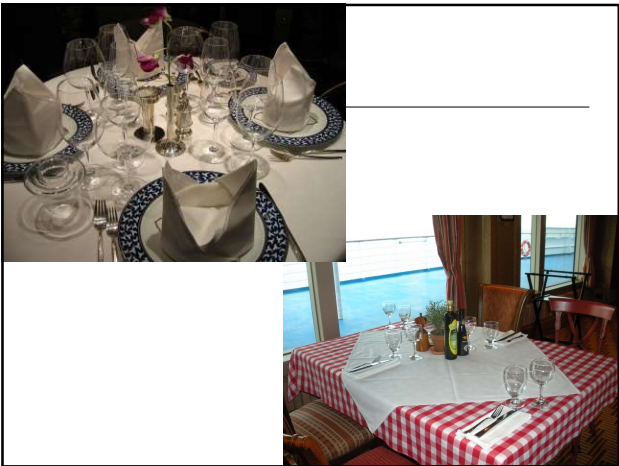
Your role in the patient experience

- The phone rings – the phone is answered and the caller chooses to become a patient. Why?
- The phone rings – the phone is answered and the caller chooses not to become a patient. Why?

9



10



11

Staff role in creating the right ‘experience’

- Exceed patient expectations every step of the way
 - Warm friendly greeting
 - Smile
 - Detail the process
 - Apologize if running late – offer to reschedule (proactively)
 - Check in regularly if running late

12

12

Staff role in creating the right 'experience'

○ Educate your patient every step of the way

Tell them what you're doing and why

Use tools to educate – videos, printed materials, iPad, demonstration samples, etc.



13

13

Staff role in creating the right 'experience'

○ Ask for patient feedback



14

14

Staff role in creating the right 'experience'

○ Involve your patient – after all he or she is the most important person in the equation

○ Especially important with Generation Y patients



15

15

5

Gen Y Facts

Born 1980 to 2000

80 million strong (Biggest generation since the Baby Boomers)

Grew up with school shootings, 9/11, Hurricane Katrina, Iraq



16

16


How Gen Y Buys

Reasonable price – research and compare

Good quality

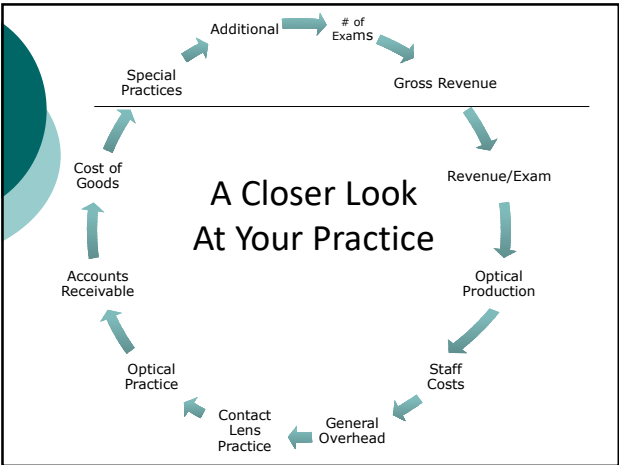
Fast service – instant gratification

An “experience” – memorable and shareable



17

17



18

Analyze your practice


- Introduction to your office
- Creating a positive first impression
- Exceeding expectations as the chair side assistant
- Exceeding expectations in the optical
- Exceeding expectations at checkout

19

19

Before the patient arrives

- Website
- Social media
- Reviews
- Yellow pages



20

20

Before the patient arrives: Create a positive first impression

- Telephone
 - Answer every call within the first three rings
 - Develop and use a phone script
 - New patient
 - Exam
 - CL
 - LVA
 - Vision therapy
 - Previous patient
 - Exam
 - CL (progress/recheck)
 - LVA (progress)

21

21

Before the patient arrives:
Create a positive first impression

Telephone

If busy ask if you may place the caller on hold

Never leave the caller on hold for more than 1 minute

If more than one minute needed ... talk to caller ask if they wish to wait or take their number and call them back

22

Office reception:
The Challenge of Scheduling

Time is finite ... only so many hours in a day

Too many patients create anxiety and stress for the patient

Too few patients creates anxiety for the office

See patients in the appointed order

23

Office reception:
The Challenge of Scheduling

Keep a file of patients who may be contacted at the 'last minute' to fill in for cancellations

Build time for the doctor or technician to return phone calls to patients and or referrers

Allow time every day (am & pm) for emergencies. Flexibility is a great asset in building a practice

24

Overview: Patient oriented scheduling

○ Define patient needs

● Match office hours with patients' availability; early hours before work; during lunch; evening hours

● Offer choice of appointment times

● See patients on time (really!)

● Call to remind a day or two before appointment

25

The Examination: Techniques to maximize doctor & technician time

○ Cross train front desk staff to neutralize patient eyewear. This starts the exam process immediately and eliminates one typical technician task

○ Schedule a progress check first in the am ... allows the doctor to become productive immediately

26

The Examination: Techniques to maximize doctor & technician time

○ Stagger work schedules ...

● Early technician 15 minutes prior to first appointment. Allows for room preparation, turning on equipment and potentially seeing an early patient

○ Always have 2-3 patients already worked up by the technicians and waiting for the doctor throughout the day

27

28

29

Increase office efficiency through effective patient communication

- Provide video education and educational reading materials to prepare the patient to purchase eyewear for ALL of their needs
- Incorporate lifestyle questions in history forms

31

31

Success as a chair side assistant

- When necessary translate for the patient – tell them the what and why of the testing
- Prepare the patient to ask questions if necessary



32

32

Taking Case History

- One of the most critical portions of the examination
 - Know what data you need to capture
 - Develop and practice your process
 - Be conversational
 - Be focused on the patient
 - Ask questions to draw him/her out
 - Ideal opportunity to capture lifestyle information
 - Your job is gather data and develop a rapport

33

33

Testing: communication

- Remember to explain the what and why of each test
 - Educate
 - Involve
- If new technologies are used
 - Talk about differences with 'old' technology
 - Talk about why new is better – more accurate, etc.
- Show results if appropriate

34


Recommending Eyewear

- ▣ **Step 1: INVESTIGATE THE LIFESTYLE**
- ▣ **Step 2: REVIEW THE OPTIONS**
- ▣ **Step 3: PRESENT THE BENEFITS**
- ▣ **Step 4: LOOK FOR AGREEMENT**
- ▣ **Step 5: CLOSE THE SALE**

35

Building The Patient's Profile


- Ask the questions and build a patient needs profile
- Be specific .. fashion, appearance, image, environment, outdoor activities, driving, reading, hobbies, etc.



36

Building The Patient's Profile


- Your objective is to fully understand how your patient uses their eyes and the fashion image they are looking for
- ...only then can you begin to assist them in their product selections



37

Presenting Frames


- Take photos for your patient so they can upload them to their Social Media pages/sites to share with their friends
- Encourage a "Twitter" vote if the patient wants feedback



38

Presenting Lens Styles

- Lens styles directly relate to lifestyle
- Occupation, recreation, sports and hobbies



39


Presenting Lens Styles

- Talk in terms of
 - Work or business lenses
 - Sports or recreation lenses
 - Lenses for your hobbies
 - Protective lenses for home or work
- **It is all about the patient – not your products**

40


Presenting Lens Styles

- Talk in terms your patient can understand
 - Don't use optical jargon
 - Do use benefits (Comfort, durability, convenience, enhanced vision)



41

Most patients need more than one eyewear option



42




Multiple Eyewear Examples: Sports

**Contact sports
Racquet sports**

Polycarbonate or Trivex lenses;
Backside A.R. Coating; Yellow tint for outdoors at dusk; Single Vision lenses; Safety or Sports frame; Safety strap

Golf

Tint to reduce blue blur (yellowish brown); Sunglasses with backside A.R. Coating; Polycarbonate or Trivex lenses; Small temporal round bifocal segment on one lens; Single Vision lenses; Larger eyesize frame



43

Multiple Eyewear Examples: Sports

Fishing, Skiing, Ice Skating, Snowmobiling, Snowboarding

Polarized; Mirror coating with backside A.R. Coating; Polycarbonate or Trivex; Single Vision lenses; Wrap frames; Sports or Safety strap



44


Multiple Eyewear Examples: Occupational

Public Speaking, Teaching

Bifocals or Progressives fit low; A.R. Coating; High Index for thinnest possible lens; Thin metal frames; Light colored plastic frames

Driving

Polarized; (Brown – hazy conditions; Grey – bright sunlight); Backside A.R. Coating for sunlenses; Clear or 5% yellow tint with A.R. coating for night; Lined multifocals or Progressives fit low



45

Multiple Eyewear Examples: Occupational

Computer use

A.R. coated; U.V. Protection; Computer tint (grey, blue or magenta); (Presbyopes) Single Vision intermediate; CRT bifocals or Occupational progressives

**Mechanics,
Plumbers,
Electricians,
Carpenters**

U.V. Protection; (Presbyopes) ADD power above and below...Double D bifocal; Industrial safety thickness, Polycarbonate or Trivex



46

Exceeding expectations: Dispensing



- Compliment the patient’s choice
 - Other staff also compliment the choice(s)
 - Take a photo for patient to post on social networking sites
- Reiterate the benefits of the products selected
- Confirm acuity/vision



47

47

Exceeding expectations: Dispensing

- Talk about care and handling
- The eyewear ‘tune up’
- Ask for review – “yelp” Facebook, etc.
- Ask for referrals – give 3 or 4 business cards





48

48

Exceeding expectations:
Checkout

○ Be ready to accept the patient’s payment

● Understand and communicate U & C

● Understand and communicate any discounts

● Understand and communicate insurance copays and payments

○ Thank the patient for his/her business

49

49

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 Conference Advisory Board considers content and speakers for future meetings to provide you with the best education possible.

VISION
EXPO

50

50

Breaking Practice Barriers

Thank you

Valerie Manso

valmanso@aol.com

51

51