The Art of Dispensing – Guiding the Patient Journey

Ophthalmic Level - General Knowledge

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Course Description:

Get an inside look at the 10 golden rules of connectivity to help you better engage with your patient as well as establish authenticity and trust during the product dispensing cycle. You will learn of a new, more effective method of guiding the patient/consumer experience by utilizing a new order in the handoff process, one that is distinct to refraction for eyewear selection versus a comprehensive eye exam. The handoff to the dispensary immediately follows the refraction marrying the problem and solution. Then the patient receives a comprehensive eye exam to determine the health of the eye. This distinction between refractive status and correction apart from eye health exam changes the flow of the patient/consumer journey to better align with the two distinct services performed during their visit.

Course Objectives:

1. Learn how to use engagement and connectivity between the patient and the entire practice to guide the patient and deliver the best optical retail experience
2. Learn how to connect a patient need to an emotion
3. Learn how to present the brand/product story

The success achieved during the dispensing of a product in your optical dispensary is connected to how well you understand your patient consumer. Know their generational demographic profile so that you can provide them with the shopping experience their after, and solve their vision needs, based on their lifestyle. The level of engagement and connectivity between the patient and you and your staff should systematically guide them to the dispensary for the best possible eyewear and lens selection retail experience. It's a consumer journey where every interaction from reception to the handoff influences the retail experience in the dispensary. Now, it's very important to understand two important concepts as you interact with this patient of yours: never assume, never prejudge. You skillfully guide, but the customer must feel that they are driving the transaction, for them to trust and have complete buy-in.

The ten golden rules for connectivity: Love your job. Prepare for your job and become a true professional. It takes over 1,000 hours to master a craft. Learn every single aspect of your current or future position. Be a people-person, or become a people-person if you're not, yet. Enjoy the ability to help your patient medically, but also help your patient-consumers look and see their best. Embrace handling objections. People that present a complaint to you are asking for help, nothing more.

The 10 Golden Rules:

1. I love your job.

2. Prepare for your job and become a true professional.

3. Be a people-person.

4. Enjoy the ability to help your patient medically

5. But also help your Patient-Consumer look their best while doing it.

6. Love and embrace, handling objections.

7. Associate a patient's "need"… to an emotion.

8. Get to know your Patient / Consumer by asking the right questions.

9. Become a product storyteller.

10. Always go the extra mile to fix the problem.

Associate, the patient needs to an emotion. Marketing consumer studies show that we buy a product based on our emotional response. When they can see themselves looking sharp in their new glasses, it's a benefit and benefits equal emotion. When they imagine their computer eye strain improved with their new glasses, it evokes an emotion. It's a benefit that improves their life. There are many products that we offer that improve the lives of patients, and when they learn how they will improve their lifestyle and make them see better, look better or feel better; the emotional impact on their buying decision is fulfilled. When you describe how a product will improve their life, you are presenting the benefits, not the features. Features equal logic, and consumers will use them to justify their emotional purchase decision.

Get to know your patient consumer by asking the right question. You can use a lifestyle questionnaire as your starting point to discover what lifestyle your patient lives to determine all of their visual challenges and needs. Become a product storyteller in a retail environment where products are merchandised to tell a story. Always go the extra mile to fix a problem. Patients won't expect you to fix everything they present to you, but they love and appreciate you for trying and going the extra mile.

So now that you learn about the ten golden rules, I think it's important for you to prepare and practice. Practicing is going to make you better, and in the process of doing that, step out of your comfort zone. If you feel uncomfortable about one of the steps that we discussed during the ten golden rules, you need to try at least to get comfortable. You will see that the more you try, and the more you practice, the better you're going to get at it, until the point that it becomes natural to you.

Okay, let's now learn how to build a memorable experience, one patient, at a time. I'm going to walk you through the handoff process and the steps before and after. The first step is taking the inbound call to schedule an appointment. There is usually a dedicated person in your practice to be able to do this. I suggest moving that person in a specific office space instead of being on the front desk of your practice because this is a very important moment of connectivity with your patient, with your present or your future patient. It's a moment where, during the conversation, we need to find a way to deliver a smile by making that person on the other end of the phone feel important. Don't take that person for granted; that person has options. They're choosing you, or they're coming back to you once again. Let's celebrate the moment over the phone.

It's also a very important moment to go into a discovery process, and important to ask a lifestyle question to collect relevant information throughout the handoff process that later on, will pass to the Doctor. Set the stage for the visit. You want to ask and say specific things that are going to help you to be more successful in building this memorable experience. Like for example, "Susie, you want to make sure you bring to your appointment all of the eyewear that you're currently wearing, both your regular pair and sunglasses. If you're wearing contact lenses, make sure you bring over whatever you have left of your supply of contact lenses." Why do we do this? We need to explain why so that your patients comply with your request. So explain that "it is important that you bring this eyewear because we're going to do a free inspection, a free alignment, and a free adjustment of all of the eyewear that you're wearing to make sure that everything is in compliance with the new prescription that we may find." The other thing you want to ask your patient is to bring a complete list of medications. Once again, you need to explain, because the medication you're taking may affect your vision, and the Doctor needs to be aware of that. And then you go into the two lifestyle questions which are very important for you to collect.

Okay, so now that we've accomplished the first step and we have an appointment with our patient, we need to prepare for the future visit. It's very important that upon arrival of the patient to your practice, you have the following information prepared to welcome the patient.

- A full patient history
- A full history of previous purchases
- A full history on compliance to product suggestion made by the Doctor and also by the opticians
- An insurance benefit printout to use for a very simple explanation of the vision benefit

Another important factor to consider is the perception that is building up in the market from a patient perspective about the difference between eye refraction and a comprehensive eye examination. When we hear a patient say that, "Oh, yes, I did had an eye exam in the last year when I went to the DMV office to renew my driver's license", I know that we have a problem. I also know that we have a problem when patients perceive that by taking an eye test on an iPhone or an iPad, or on a computer with a camera, they perceive that they have or they took a comprehensive eye examination. So there is definitely an education process that we need to be able to address in terms of overcoming this phenomenon that is actually becoming a huge perception problem.

So traditionally, we used to conduct a very specific step system that was originally designed as follows: Pretesting, followed by a comprehensive eye examination, followed by a handoff process from the Doctor to the optician and the optical dispensary. And the handoff, traditionally done either in the medical lane or even better, in the actual optical dispensary. I suggest an advanced method where we o create a clear distinction between eye refraction and a comprehensive eye examination.

The new method is becoming a popular practice to increase that connectivity with an evolving patient expectation and dramatically increase the practice capture rate. With this method, the capture rate can be 65% to above 90%. It is a two-step process, where the refraction follows pretesting, not the medical exam. The patient is informed that the Doctor will conduct refraction to determine their eyeglass or contact lens prescription before completing a comprehensive eye health examination.

The Doctor also has access at this point to the lifestyle questionnaire, so he can also prescribe additional technologies to address the lifestyle specific vision correction needs of the patient. It can be a blue filter technology, or it can be a pair of glasses for computer use, or it can be a pair of outdoor glasses because of the lifestyles of the patient or because the Doctor has discussed the importance of eye protection from U.V. radiation. After we're done addressing the prescription part, we go into the dilation process if it is necessary. And at this point, you need to decide if you want to use an advanced diagnostic system like, Optomap or Optos, or if you want to stick with the traditional dilation system which would require an additional 10 to 15 minutes to the patient to wait for the actual drops to take effect.

In step number two, the comprehensive eye examination is performed. What the Doctor will go into the actual medical eye examination of the eyes, and at that point, the Doctor may discover an additional issue that needs to be addressed with the prescription that would require an additional handoff in the optical dispensary to address that additional discovery. This system is going to give you the opportunity to demonstrate a very strong distinction between refraction and comprehensive eye health examination. It should be explained to the patient that this part of the process is to check their eye health.

Okay, so now back to the beginning. We have the appointment, we're prepared for the visit, and we have all of the relevant information on hand. The patient arrives for the appointment. So how do we build a memorable experience?

It starts at the front desk, where I know you're multitasking with five different job assignments. You're probably taking an inbound call, you're scheduling an appointment, you're filing an insurance claim, you're doing insurance preapproval, and who knows how many more things you're asked to do?

So you're a super-duper multitasker, but at this moment, the most important task is to create a memorable experience that means personalized attention given to that patient. So when that patient comes through your door, for 60 seconds, it's all about the connection with the individual and nothing else matter. And I would strongly suggest you stand up, because the body language communicates a sign of respect, and greet that patient in a warm, welcoming way with a beautiful smile, making them feel special and glad that they came to see you. As you're welcoming them, set the stage for their journey. Explain what is going to happen during the visit, how long the visit is going to take and provide options while introducing the optician that is going to help them. Present the option of waiting for the technician to do the pretesting, or browsing for eyewear in the optical dispensary until the technician is available.

As you're having this conversation, ask two lifestyle questions from the lifestyle questionnaire. So now you have four relevant questions answered, two over the phone and two in person. This information is to be passed on to the doctors throughout the handoff process. The optician is going to take over the conversation, and he or she is going to explain the vision benefit very quickly and in a very simple way because you provided to the opticians the folder with the history of the patient.

The optician is going to reinforce the option. "Susie, there is about a five minutes wait for the technicians. You can wait in the waiting room if you wish, or (with shopping tray in-hand) we can browse in the optical dispensary with no obligation, to see if we can find something that you like, and your insurance provides a generous allowance that we'll apply toward your new eyewear."

So now, we're moving into step three, which is the pretesting process. So the technician will come from the pretesting room to greet the patient, either in the waiting room or the optical dispensary, calling the patient by name, introducing themselves with a beautiful smile, and welcoming the patient to move into the pretesting room which is going to encompass a three-step process: test, discover, and transfer. This process is going to take about between 10 to 15 minutes. It's a discovery process where we're going to collect specific information to enable the Doctor to conduct effective eye refraction and comprehensive eye health examination.

The technician has an opportunity to connect with the patient and to ask an additional two lifestyle questions, and again, relevant information that's relayed to the Doctor. At the point that the pretesting is over, the technicians will now hand off the patient to the Doctor. Now to discuss the method followed in step 4: the traditional system, which is the comprehensive eye examination, or the new method that I described before, which encompasses the two-step process; eye refraction first followed by a distinctly separate comprehensive eyehealth examination.

No matter which method you choose to embrace, it is very important that the technicians transfer all relevant information about pretesting and lifestyle discoveries to the Doctor. Most are using electronic medical records, and so you will have all of the information on your fingertips, right there on the monitor. Technicians, I invite you to take brief notes to really be able to bullet point information for effective transfer to the Doctor.

So now that the eye examination is complete, the next very important step is the handoff to the dispensary and the optician. There is a debate about where the handoff should be conducted? Should the handoff be conducted in the medical lane or in the optical dispensary? I prefer for the handoff to be conducted in the optical dispensary because it's going to give an opportunity for the Doctor to spend a couple of extra minutes with the patient to be able to walk into the optical dispensary and to be able to hand off the patient to the opticians in person. And at that moment, the Doctor will communicate with the opticians, giving direction to the opticians, such as 'I have prescribed a progressive clear pair and sunglass, please discuss the benefits of polarized sunglasses and show the patient a demonstration. During this exchange, the Doctor makes eye contact with the patient. If the optician were to open the topic of sunglasses with a patient, it is going to come across as a suggestion, while the Doctor will be seen as prescribing. Especially if they write separate Rx's.

And if that process is done correctly, you should have 100% patient compliance because the Doctor prescribed. Think about yourself. When you go to the Doctor, and then you go to the pharmacy with a prescription in hand, do you usually give the prescription to the pharmacy and say, "I would like to fill this prescription", or would you say to the pharmacist, "I was given at least three prescriptions, I would only like to fill one of the three. I'm going to put the other two on hold." We just don't do that, right? We just comply with what the Doctor is actually suggesting, otherwise, what is the purpose of going to the Doctor?"

So why not elicit full prescription compliance in an optometric eye examination? Now for the handoff, you can choose to do the handoff in the medical lane, or you can choose to do the handoff in the optical dispensary. I know that some of you are using a paging system, so I want to respect the policy that you have. I also want to respect the efficiency that you may have put in place. But no matter what, make sure that the handoff is always done in the presence of the opticians. The biggest mistake that you can do, just because you're running too busy, not to follow the proper handoff and have the patient wait in the optical dispensary for the optician, which at that time is not available, and because the Doctor is too busy going from one eye exam to another eye exam.

In that specific situation, I would prefer for a doctor to ask the optician to be excused from what they're doing for just 60 seconds to conduct the proper handoff. Then the Doctor can go back to the medical lane after that is done. The opticians can go to service the previous patients. It's only going to take less than two minutes. And the patient that was just going through the process of the handoff now can actually wait a few minutes, maybe with a dispensing tray on their hand, to really start to select a product from the optical dispensary.

So now we'd like to walk you through a series of tips for success. You're going to find some of these things that I'm going to mention to you are things that you're already implementing, some of which may not be implemented at present, and I would strongly suggest you walk outside of your comfort zone and really try something new. You will be surprised about the result that something so simple can bring to you and to your practice.

Review a few key features of insurance coverage and let them know right off the bat about any second pair deals you can find. Position insurance benefit as a huge positive. Reinforce the fact that the insurance benefits represent a 40% average savings off the purchase of the new eyewear that they are going to love. Leverage the power of relationships. Do not be afraid to ask. Leverage the power of brands and the power of lens technology.

Do not assume or prejudge, and adopt a multiple-pairs communication mindset. Assume that money is never an issue, and every patient wants the very best when they walk into your door. Even if someone states they only want what insurance covers, still select a few frames over the insurance allotment and educate them about the best lens and coating by underlining the features and benefits of the product. Leverage on discoveries of lifestyles question. Use your eyewear wardrobe to storytelling.

Always listen to people, and guide them based on your discovery of their vision needs and your knowledge of eyewear fabrication. Recommend what you thought would look and work best. Sometimes people will say, "These are just glasses." We must remind them that they're on their face. They're the first impression you give to other people. More importantly, you only get two eyeballs, so does it make sense for us to do everything possible to care and to protect them? Leverage on the lifestyle information discovery and position multiple pairs option by addressing the benefit. Always present outdoor wear as an option, and storytelling the relevance and the benefit.

Become a storyteller. Visual storytelling in retail engages on an emotional level. It is welcoming, surprising, and inviting. It creates a memorable experience and builds a personal connection. Effective storytelling showcase lifestyles, fashion, luxury, and brings to life the technical aspect of the product. Size the story to the audience. Be mindful of the different personality types of your audience. Do the math. Present options and break them down with financial solutions. Entice multiple-pair sales with a bundled package and leveraging financing options.

43% of patients are interested in a financing offer, 90 days the same as cash. 77% of them will buy at least once a year, and 40% of them will buy two pairs if presented with a financing option. Without a financing offer, consumers typically purchase a pair of eyeglasses every two years, and only 5% purchase a second pair.

Now allow me to share with you some dispensing tips based on what I learned from many of you opticians that I interact in my 30 years of optical experience. When the final job is ready for delivery, dispense the glasses to the patient you helped. Do not delegate to another person. Make a clear statement on how good they look. Address whatever emotion you have uncovered in the selling process, and make sure you fulfill the need that the patient had. Address the patient by using their name and remind them of your name. Always discuss the option for outdoor wear to complement their purchase and underline the fact that the second pair is less costed than the first, not to mention a specific special that you may offer on a second pair.

Present the final product to the patient consumers like fine jewelry, using a fine dispensing tray, along with cleaning cloths. Dispense the frame with two hands by positioning the frame on their face, and then tug the frame by gently touching the back of the ears of the patient. This is a gentle sign of care. Remind them of the key features of the lenses and also the frame that they choose, and teach them how to use the proper product appropriately.

Leverage the authenticity card, both for frame and lenses. Do not discount this very important step. Point out the value of the free eyeglass case that you're giving to them and other freebies, like the cleaning cloth or a cleaning product that you may choose to give to your patient as a gift. Always thank the patient and always end the transaction with an open-ended question. "What else can I help you with today?" As the patient consumer is leaving, always walk them through the door, always remind them to call you for any assistance personally. At the end of the day, the patients are what drives your business. Both the doctors and the staff have the responsibility to educate and to install value in the service and the product offering.

In closing, let's be reminded of the fact that the fortune is always in the follow-up. For the doctors and the staff, take the time to do the follow-up. A phone call, a nice thank you note to really deliver that personal touch with your patient. And also I would strongly suggest you to always, always ask for a referral. How? Well, promote a positive word-of-mouth advertising and develop a program to incentivize your patients to post positive reviews on your Facebook, Instagram page, and other social media. Word of mouth, today, travel to social media and is very relevant to be active with that campaign.