

Improving Personal or Staff Knowledge

An optician's training should follow a curriculum for best results. A new optician requires the basics of selling and the technology of frames and lenses. For each, the materials, designs and treatments should be learned. An experienced optician requires ongoing updates and sophisticated information on technology and its uses. A knowledge of marketing, merchandising and sales always complements technology.

Choose the CE topics and technologies below that provide the right tools to create an educational plan. Use the plan and a review process to verify that the information was learned; use written exams and practicals to test for skills achieved. Record results and provide new goals for the next review period.

A categories list, CE courses available and a suggested planning outline follows.

Study Categories CE Courses Available

RECEPTION AND THE APPOINTMENT BOOK

Filling the appointment book

- ∞ [Opticians' Handbook 2005](#)
- ∞ [Opticians' Handbook 2006](#)
- ∞ [Opticians' Handbook 2007](#)

PRETESTING AND PATIENT RECORDS

Pre-testing and an instruments "how-to"

- ∞ [Tech for Success 2006](#)

THE OFFICE SYSTEM BACKBONE

Hardware and software needs

- ∞ [Tech for Success 2005](#)

THE TECHNOLOGY OF FITTING & DISPENSING EYEWEAR

The Basics

Lens Materials, Designs and Treatments

- ∞ [Physiologically Fitting Progressives—Creating Designs and Technologies for Peak Performance](#)
- ∞ [Computer Vision Syndrome: Its Cause, Treatment and Potential for the Modern Ophthalmic Practice](#)
- ∞ [Lens Hardcoating—Great Expectations, Great Results](#)
- ∞ [Choosing Eyewear for Everywear and Anywear—The Billion Dollar Opportunity](#)
- ∞ [Living the AR Life - Better Vision, Happier Patients, Business Growth](#)
- ∞ [Eyewear Musts for the Senior Patient](#)
- ∞ [Adding to the Lens Toolbox Satisfies Every Patient Need](#)
- ∞ [Catering to the New, Active, Progressive Wearer](#)
- ∞ [Short-Corridor Progressive Lenses](#)
- ∞ [Searching for the Ideal Progressive Lens](#)
- ∞ [All You Need to Know About Anti-Reflective Lenses](#)

Frame Materials, Designs and Handling

- ∞ [Intelligent Clip Technologies Add Profit and Improve Practice Professionalism](#)

Sunlenses and Specialty Filters

- ∞ [Exposing the Myths Of Polarized Lenses](#)
- ∞ [Defensive Driving Just Got Easier](#)
- ∞ [Healthy Sight Counseling, A New Approach to Healthy Vision](#)
- ∞ [Coloring the Performance of Sunwear](#)
- ∞ [Reducing the Glare in Your Life](#)
- ∞ [How to Protect Patients From Harmful Sunlight](#)
- ∞ [Visual Health and Patient Satisfaction](#)

Frame Design and Its Effective Use

- ∞ [The Pediatric Dispenser's Rulebook: Making Kids' Glasses Child's Play](#)
- ∞ [Frames: A Primer on Fitting and Adjusting Today's Materials and Design](#)
- ∞ [Rimless Eyewear: Making the Right Choice](#)

SunglassSpecialties and Wrap Eyewear

- ∞ [Selecting, Filling and Fitting Wrap Prescription Eyewear](#)

Dispensing and Frame adjusting Techniques

- ∞ [Working With and Adjusting Rimless Eyeglass Mountings](#)

In-Office Lens Processing Equipment

- ∞ [Tint Hints: How to Improve Your Tinting Techniques](#)

Fitting Instruments and Tools

THE BUSINESS OF EYEWEAR

- ∞ [Managing Your Profit Center: Take the Guesswork Out Of Frame Inventory Management](#)

OTC and SPECIALTY EYEWEAR

Readers

Low Vision

CONTACT LENSES

Anatomy and physiology

- ∞ [Anatomy and Physiology for the Contact Lens Fitter](#)

Materials and design

Fitting and patient management

- ∞ [Triage—Evaluating and Prioritizing Patient Emergencies](#)
- ∞ [An Eye For Detail: Being The Best CL Technician](#)
- ∞ [Contact Lens Fitting for Seniors and Children](#)

Office procedures

MARKETING, MERCHANDISING & SALES

Identifying Lost Opportunities

- ∞ [Mars Needs Glasses: Selling Eyewear to Men](#)
- ∞ [7 Rules for Dispensing Women's Eyewear](#)
- ∞ [Sunwear Success](#)

Branding and Differentiation

- ∞ [Differentiation: The Key to Set You and Your Office Apart from the Competition](#)

Optical Sound Bytes

- ∞ [Scripting Your Sales Staff For Successful Selling](#)
- ∞ [Strategies for Dealing with Difficult People](#)
- ∞ [How to Combine Product Presentations with Verbal Messages](#)

Making Multiple Pairs Real

- ∞ [The Second Pair Sale - A Focus on Presenting and Not Quoting Price](#)

Using Point of Purchase and Collateral Materials

Store Design and Display

Direct and Electronic Mail

- ∞ [Making Direct Mail Fit Optical](#)

Websites

Advertising

REFERENCES

Glossary

Knowledge Planning

Name _____

Objective:

Develop the skills to efficiently help patients achieve their eyewear wants and needs. This includes developing the reception and sales skills to meet and greet customers, analyze their spectacle prescription, assist with frame and lens selection, verify the eyewear when returned from the lab, complete bench alignment and dispense it with confidence. Combine this plan with the quality; attendance, teamwork and organizational skills development plan from other sources for a more complete outline.

Task Category	Completed Date and Initials
<ol style="list-style-type: none"> 1. The basics of the office structure and the path of patients through this office 2. The US eyewear market 3. Optical math 4. The basics of customer service 5. The eyeglass or contact lens customer <ol style="list-style-type: none"> a. The components of eyewear and good vision b. Eye conditions and the lenses that correct them, major eye conditions and definitions 6. The prescription <ol style="list-style-type: none"> a. Understanding lenses and lens power <ol style="list-style-type: none"> i. Some basic optics ii. The prescription iii. Locating the power in lenses iv. The optical center v. Prism in lenses vi. Using the lensmeter – the basics b. Lens styles, SV and Multifocal <ol style="list-style-type: none"> i. SV, Bifocal, Progressive, Trifocals c. Designs – standard or flattened <ol style="list-style-type: none"> i. Spherical and aspheric d. Materials – Thinner and Lighter <ol style="list-style-type: none"> i. Polycarbonate, high index and plastic e. Treatments – Clear, Convenient, Sun and Safety <ol style="list-style-type: none"> i. Anti-glare ii. Photochromic iii. Polarized iv. Tints 7. The eyeglass frame <ol style="list-style-type: none"> a. Types and materials b. Frame measurements c. Fitting frames to customers d. Color and style, shape and size 8. Measurements required <ol style="list-style-type: none"> a. The PD <ol style="list-style-type: none"> i. Taking PD measurements b. Segment height <ol style="list-style-type: none"> i. Taking segment heights 9. The eyewear selection process <ol style="list-style-type: none"> a. With Rx in hand <ol style="list-style-type: none"> i. Customer details 	

	<ol style="list-style-type: none"> 1. Work, play, height, posture, wants, needs 2. Assessing the requirements 3. Making recommendations ii. Frame selection <ol style="list-style-type: none"> 1. Elements of a good fitting frame 2. Customer and frame sizes 3. Colors and materials iii. Lens recommendations <ol style="list-style-type: none"> 1. Thinner, lighter, safer 2. Anti-glare 3. SV or multifocal iv. Pricing and overcoming objections v. Using point of sales displays and customer literature vi. What will happen between now and when you receive your eyewear 	
10.	The pricing of eyewear <ol style="list-style-type: none"> a. Packaging or a la carte b. Managed care and health insurance c. Definitions 	
11.	The ordering system <ol style="list-style-type: none"> a. The ordering process b. Electronic web ordering 	
12.	What's behind the prescription <ol style="list-style-type: none"> a. The lab and its processes 	
13.	Receipt, verification and alignment <ol style="list-style-type: none"> a. Completed glasses from the lab b. The verification process c. ANSI Z80.1-2005 d. Bench alignment e. Calling the customer 	
14.	When the customer arrives for delivery <ol style="list-style-type: none"> a. Presenting the eyewear b. Fitting and Adjusting c. A quick check of vision and the way they use the glasses d. Care and cleaning e. Follow-ups required 	
15.	Troubleshooting <ol style="list-style-type: none"> a. Frame fit b. Lens issues c. Vision complaints 	
16.	Final payment	
17.	Receipts and records <ol style="list-style-type: none"> a. Maintaining customer records b. The electronic office 	
18.	Ophthalmic instruments and equipment	
19.	A focused and more advanced view <ol style="list-style-type: none"> a. Improving the Progressive Toolbox b. Updating our understanding of lens materials c. Implementing the latest in AR lenses d. Making photochromics clear e. Using polarized more effectively 	

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| <ul style="list-style-type: none">f. Considering and implementing new office management softwareg. Developing a marketing planh. Troubleshooting eyewear complaintsi. Handling difficult customersj. Rimless repairs and adjustingk. Basics around the low vision patientl. Glare and the aging eyem. When to repair and the "how-to" | |
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