

The Quarterly

The Magazine for the Ultimate Eye Doctor Community

IDOC
independent together™



How ODs are
maneuvering in
the new landscape

AGILITY

INSIDE

*The plan that makes
your practice thrive*

*Finding your marketing
success in 2017*

*IDOC Select Plus'
recipe for success*

*How to keep your
patients coming back*

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The Long Run

Within a physical environment like an independent optometric practice, customers often are sold on products that seem like the best deal in the moment. They look in the mirror and think their new frames feel great and look cool. The price sounds amazing. Everything seems great.

But then they get home and the luster is gone. The frames don't seem to work for them in a different light. They discover a deal where the advertised price is 10 percent less. They start to feel like they maybe they did not get such a great deal. They feel like they overspent and that the product doesn't deliver on the feeling they had in your office.

Smart independent OD's won't let this occur. They realize that "in store" credibility pales in comparison to a product or service that not only stands the test of time, but delivers value beyond the point of purchase. When your products or services carry sustainable value, people live with it and proudly share it with others – and tell others where they got the product or service too.

When you create an at-home experience that builds upon the original good feelings, you may have to sacrifice a bit of in-store size in favor of a positive feelings over time. A product that executes on the basics beautifully may not seem as sexy as competitors loaded with bells and whistles. Being great at a few meaningful things often doesn't look all that flashy from afar.

That's OK. You're aiming for a long-term relationship, not a one-time thing.

When your products or services carry sustainable value, people live with it and proudly share it with others.

This is as true for advertising as it is for in-store packaging or displays. We've all seen a TV ad for some "revolutionary" gadget that will change our life. But when the actual product arrives in the mail, it turns out to be a disappointment. In-media good isn't nearly as important as an at-home good. You can't paint over a bad experience with good advertising or marketing.

In this issue of *The Quarterly*, our cover story, "Agility," takes an in-depth look at how today's independent eye care providers are maneuvering to create a long lasting experience. Along with keeping up with the latest technological advancements, it examines the importance of becoming more in tune with the marketing and analytical sides of running a business.

Our second feature, "A Taste of the Good Life," shows the importance of leaning on partners like IDOC to build your practice.

As you progress head long toward the summer, we will continue to provide you with the resources you need to succeed.

After all, we are aiming for a long-term relationship with you as well.

Thank you for being members of IDOC, and as always, let us know how we can help you.



Dave Braun

We hope to see you at our upcoming conferences

2017 Western Regional Conference
May 21, 2017
Westin St. Francis – San Francisco, CA

2017 Fall National Conference
October 25-28, 2017
Grand Hyatt Denver – Denver, CO

2017 Eastern Regional Conference
December 3, 2017
Westchester Marriott – Tarrytown, NY

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AGILITY

How ODs are
maneuvering in
the new landscape

By Michael J. Pallerino

She hit post, and waited. Dr. Erin McCleary admits that the curiosity was a bit exhilarating. It wasn't her first Facebook post, just the first for her practice, Clear Horizon Eyecare in Plainville, Conn. And it just happened – Clear Horizon's first post came this year. McCleary made the decision to step into the world of social media marketing and metric analysis because she knows these types of initiatives matter today.



Independent ODs must understand what it is they do well and what their value is in the marketplace and effectively communicate that."

– Susan Daly, Optical Management Consultant for IDOC

The thinking, as McCleary honestly admits, is that if the metrics show that posts like the one she's making daily eventually increase visits and, subsequently, revenue, it will all be worth the effort.

"I think most ODs would hope that they (metrics) didn't matter, as we weren't trained to care about these things," says McCleary, who has been practicing Advanced Optometric Care in Connecticut since 2007. "But as an independent practitioner, who's in charge of her own marketing, I think that they do."

Ask any of today's independent eye care providers, and you'll get similar responses. The growing dependence of social media platforms like Facebook, Twitter, Pinterest, Instagram and Snapchat are forcing ODs to add new skill sets to their business acumen.

Along with keeping tabs with the latest technological advancements, they have to become more proficient at things like marketing and analytics. Long gone are the days when patients call or stop by their local OD office to see what kind of sales or promotions are happening.

Today's OD must be able to construct campaigns that include social media, email and print. "I think the best approach is to have a multi-factorial one," McCleary says. "And even though social is the way of the Millennial, you have to be willing to branch out in various media outlets and opportunities. The way people get their information on a daily basis is changing, especially for the younger consumers. Instant search-ability is mandatory. Rarely

will someone go to Google to find a new eye doctor. They're going to ask a friend and/or their Facebook cohort whom they recommend. They're going to do their research."

"I think most ECPs would hope that they (metrics) didn't matter, as we weren't trained to care about these things. But as an independent practitioner, who's in charge of her own marketing, I think that they do."

– Erin McCleary, O.D.,
Clear Horizon Eyecare

And here's the thing – if it's too hard to do alone, recruit somebody who has the skills and passion to help out. "More and more, I believe this is going to be a direct-to-patient relationship, where digital/social media helps. So finding a person who has a passion and is well versed and comfortable doing this will help."

FINDING YOUR PURPOSE

Steve Alexander, an Optical Management Consultant for IDOC, says the edict for today's eye care providers is pretty simple: To get new patients, you have to find creative ways to get in front of them.

Changing your marketing mindset is the perfect first step.

Alexander gets it. In fact, he sees it every day. For too many ODs, marketing is a daunting – scary even – prospect made even more complicated by the sheer variety of choices available. Today, a practice can get their name out there in a hundred different ways, but where and how should you invest your time?

He recommends taking one small step at a time. "That will get you there faster than standing still," Alexander says. "Many (ODs) are, but some are more cautious of changing a formula that has worked for them for so many years. But things like social media, when done right, are an effective and relatively inexpensive way to get your practice in front of thousands of people repeatedly throughout the day."

In the changing world of optometry, you have to know what's working and what isn't across the board. So, when you're dealing with something like marketing, you must be able to read the metrics and data. This will lead to better decision-making.

"Independents are adapting," says Susan Daly, Optical Management Consultant for IDOC. "They are receptive to new ideas and processes. Their ability and potential, often underutilized, to move quickly and incorporate change can be seen in proactive optometrists across the country that believe what they have to offer trumps the chain."

Daly believes that data and metrics are necessary for the independent OD. Not necessarily analytical by nature, small business owners can decide the direction of their company largely based on instinct. "This may work for a time



but as time progresses, and business plateaus, data is what will drive change and adaptation to a new reality," she says. "Emotion is fine for the launching point of a business, but will not sustain its growth long-term."

"To get new patients, you have to find creative ways to get in front of them."

— Steve Alexander,
Optical Management Consultant, IDOC

If you step back and you look at it, the whole premise is pretty straightforward, Daly says. Ignoring the competition for a moment, the marketing of any business must change over time. Your message must evolve.

"When a business is new, that is the message," Daly says. "When a business is innovative years later; that is the message. When customers become loyal friends to the practice; that becomes the message. Independent ODs must understand what it is they do well and what their value is in the marketplace and effectively communicate that. The only real goal is to be better than you were yesterday, not communicate the same message coming from the competition and hope the consumer knows the difference."

The key, she says, "Market when you don't need to in order to drive business when you do."

7 WAYS TO BETTER MANEUVER YOUR MARKETING

Ah, marketing. There's so much to know. Metrics. Analytics. SEO. Keywords. Clickthrough Rate (CTR). Conversion Rate Optimization (CRO). And the list goes on. So, what do you do? And why? Here's some advice to get you started (and calm your fears):

1

JUST TRY IT

Yes, get your feet wet. Make an effort. If it's too hard for you alone, get somebody to help.

2

ASK A TON OF QUESTIONS

Crowdsource this thing. Ask your colleagues what's worked and what hasn't. Take a class. It's all about trial and error – so move ahead, take notes and always be learning.

3

IDENTIFY YOUR CORE STRENGTH AND MARKET AROUND THAT

Your business is a reflection of you and your strengths. Focus on what the competition cannot contradict and communicate that in the most simple and concise way possible.

4

FOCUS ON YOUR WEBSITE

If you don't have one, build one. If you have one, take a close look at the presentation. Ask yourself, "Would I schedule an appointment here?" The answer is the key.

5

GET BETTER EVERY DAY

Set a goal to improve one facet of your social media strategy every day. Make more posts. Send more tweets. Take a deep dive into what your metrics are telling you.

6

PLAN YOUR YEAR OUT IN ADVANCE

Know what's happening in your office (trunk shows, OD absences, etc.) and adjust your marketing accordingly. Your strength comes from how you build your patient engagements.

7

DO SOMETHING AND SEE IT ALL THE WAY THROUGH

It doesn't matter how big or how small, just think about your plan and execute one small step at a time. The key is to not only get the ball rolling, but also keep it rolling.

Sources: Susan Daly, Optical Management Consultant, IDOC; Steve Alexander, Optical Management Consultant, IDOC; Erin McCleary, O.D., Clear Horizon Eyecare

Sign me up

LensFerry® helps keep your patients coming back



In the middle of last year, Cheryl Lennard, OD, had made her decision. After a deep dive into what her patients were looking for in the way of eye care needs, she noticed that when it came to 1-day lens wearers, City Eyecare was losing sales.

Reports show that the annual supply capture rate of 1-day products across all U.S. practices is 21 percent, meaning that roughly one out of five 1-day wearers are susceptible to purchasing the remaining supply by other means when they leave an ECPs office.

Those numbers jumped off the page. In the ever-competitive drive to keep pace in today's eye care market, Dr. Lennard knew that her Coral Springs, Fla., practice had to remedy the situation.

Enter LensFerry® S. The monthly subscription box model would help put her 1-day contact lens wearers into a service that provides them what they need, when they need it. Plain and simple – today's consumers want easy. And Dr. Lennard vowed to right the ship.

"We are an e-commerce society," she says. "If you're not in the game and playing it correctly, you're losing out. When we looked at what the LensFerry® S program offered, it was a no brainer. It is convenient and cost-effective for our patients, and for us, it enables us to recapture those sales that we lost."

"When we looked at what the LensFerry® S program offered, it was a no brainer.

– Cheryl Lennard, OD, City Eyecare

By giving her patients a program that divides the annual cost of 1-day lenses into automatic monthly payments and quarterly lens deliveries, City Eyecare was keeping them from that dreaded "search and shop" mode.

The benefits of the LensFerry® S practice are invaluable – the opportunity to fit patients in the best lenses available, generate increased annual supply sales, capture a predictable revenue source and save on valuable staff time.

And get this – the program isn't exclusive to 1-day lenses or just CooperVision branded products. Recently the program was enhanced to include all manufacturers and all modalities at eye care professionals' specified prices. That means that eye care providers like City Eyecare can receive the sales revenue as if the lenses had been paid for in-office for any product they prescribe to their patient.

"The consumer is out there searching, so you can either offer them a solution to stay with you, or they'll go elsewhere," Dr. Lennard says. "You have to be proactive. When we went to our patients with this program, they were very excited. They found they didn't have to worry about running out of contacts, the lenses are delivered right to their door and, most importantly, they don't have the big up front cost."

There are ancillary benefits to joining the LensFerry® S program, too. For example, with every subscription, CooperVision makes a donation toward an eye exam for a person in need through Optometry Giving Sight. In addition, patients are eligible to receive a \$25 rebate when they enroll in LensFerry S and purchase any CooperVision product (offer good through April 30, 2017).

"It's just a great and easy way to make a sale," she says. "We would have people calling on the day they were down to their last set of lenses. So, they've been pretty excited about this. If you're not doing it, you need to be. So many ODs look at making more investments on the medical and innovative side of things. But the truth is, you should be looking at how to make investments on the retail side. And this is a good place to start."

Join Our LensFerry® S Team Today



ENTER Rx

Simply enter the patient's info and RX. You set the price.



WE DELIVER

Regular shipments to your patients from your distributor of choice.



YOU GET PAID

We'll send you a check each month that product ships.

Marketing Success in 2017

A plan will make all the difference

By Michael Pote



Marketing is not on any curriculum I have ever seen in optometry school, and yet it may be one of the most important aspects of running a small business.

One way to make marketing more tangible, and more actionable, is not to look at it as one activity, but many storytelling devices that combine to form this thing we call "marketing."

Why is this important? Because looking at the "marketing elephant" you may rightly surmise, "That's way too big to eat." But break it into bite size parts, and your confidence may be bolstered. You will find you're able to do quite a bit.

Deciding what aspects of marketing you can do starts with understanding the universe of marketing activities. It is broad and wide, and the activities are connected by the singular goal of telling your practice story.

So, what's your story? What's the essence you want your community to understand about Dr. You and your practice.

Sometimes, this is captured as a mission or vision statement. Sometimes, it's best articulated in your practice values. In all cases, it needs to be simple, straightforward and easy to understand. Don't be afraid to take your stand on "something" and avoid trying to be "everything."

From there, start with a plan. You can download our one page planning guide. Why one page? Because it's important to see the big picture.

One way to make marketing more tangible, and more actionable, is not to look at it as one activity, but many storytelling devices that combine to form this thing we call "marketing."

What you're doing in one part of your plan can significantly help and support another part, so you want to see all of your ideas at once.

"But I don't have any ideas?"

Not true. Better yet, great marketers beg, borrow and steal from each other without shame. We'll even give you a head start by letting you "steal" as many of the ideas as you can from our Strategic Planning 2017 ebook (<http://hubspot.eyecarepro.net/strategic-planning-ebook>). Forty-nine pages of ideas you've seen before, but never thought to apply them to your practice story.

Use the book to find ideas. Use the plan to organize them. And now the hard part – you'll need to implement. Our experience is success begets success. Try an idea. When it works, you'll be very inclined to try another. And then another.

And very soon, I'll be out of a job.



Michael Pote is COO of EyeCarePro and lectures regularly on marketing strategies for optometric practices. EyeCarePro serves more than 1300 optometric practices in the United States and Canada.

Tap into our knowledge base

The ABB OPTICAL GROUP Business Review provides valuable metrics for planning

By Angel Alvarez



TOP 500 ACCOUNTS BENCHMARK METRICS

Units YTD		Order Placement		Order Shipment			
Daily Disposable	36.8%	Sphere	62.9%	Website/EDI	85.0%	Ship to patient	30.0%
2 Week	27.4%	Toric	26.7%	Phone/fax	15.0%	Ship to office	70.0%
Monthly	35.6%	Multifocal	7.9%	(based on # dollars, YTD)		(based on # dollars, YTD)	
Other	0.2%	Colors	2.6%				

So often, new **ABB OPTICAL GROUP** accounts are surprised by the breadth of service we deliver. They may have signed on with us because they wanted the administrative simplification of one-stop shopping and consolidated shipping, and billing. What often is a bonus to them is the discovery of how much knowledge our account managers bring to the table.

The most obvious example is the Business Review. With the beginning of the new year, a Business Review is not only timely, but essential in helping guide your path for a successful year ahead.

So we asked ABB OPTICAL regional field sales trainer and senior account manager, Robert Gruendell, to share his experiences on how to maximize the value of the Business Review. Here's how he explains the value:

Accounts lean on us to be fair consultants to them. The Business Review is one of the most important tools we have that provides both the doctor and me the information needed to make better business decisions for their practice.

I try to schedule Business Reviews one or two times per year, at a minimum. That second meeting is essential, because that's the time where we can see if the practice is on track with the goals we established, and we can strategize about alterations that would improve performance.

In other words, the Business Review is helpful in not only outlining goals for the year, but also in tracking where you are toward those goals with enough time to take action.

Although having a business plan is a fundamental component of managing a business, in truth, many eye care practitioners don't make or update their business plans regularly. The Business Review provides the building blocks necessary to create major elements of a business plan, so I don't leave an office until we've outlined a strategy with clearly defined goals. It's important that the doctor or owner and I review this information together.

That's one piece of advice I have for any new ABB OPTICAL account. If you're accustomed to sales representatives dropping off a usage report, prepare to be wowed.

Seriously. In fact, we don't leave these Business Reviews behind, because seeing the wealth of data in these reports is only one part of the picture. What your ABB OPTICAL account manager can do is interpret your data and compare it to similar data points for the "Top 500 ABB OPTICAL" accounts and for other practitioners in your area.

Here's one scenario where that plays out. Let's say a practice has a goal of getting to 40 percent daily disposable contact lenses. At our most recent Business Review, we set out to move toward that goal. At the next Business Review, the doctor says, "My staff says our patients don't want it. We seem to be stuck at about 20 percent, and that might be as high as we can go in our demographic."

I can pull up ZIP code and regional data and say, for example, "The average in other practices in this area is 36 percent."

Now there's an assurance that it's not the patient demographic that's holding down those numbers, but one or more internal processes. Does the recommendation start in the exam room? Are staff members confident in showing patients the value of an annual supply?

ABB OPTICAL has tools and resources – and staff training – we can share. That's not a level of understanding you can get from a usage report alone.

Now is really a perfect time for a Business Review. It's a chance to review your 2016 achievements, see where you exceeded or fell short of goals and make a targeted plan for 2017.

Best of all, ABB OPTICAL can help provide this data across the board: soft contact lens sales, specialty contacts, ophthalmic lenses and, through your Digital Eye Lab eyewear specialist, digital ophthalmic lenses.

Angel Alvarez is CEO at ABB OPTICAL GROUP.

Essilor Labs bring you IDOC Select Plus T.O.P. Service™



Essilor Labs is excited to bring IDOC Select Plus members guaranteed lab services that provide peace-of-mind, timely delivery, all while maintaining the quality of jobs that can be depended upon. Essilor is committed to delivering excellent lab service and consistent on-time delivery to all IDOC Select Plus members- any delay and we will pay.

IDOC Select Plus T.O.P. Service™ assumes the responsibility for meeting a one-week delivery commitment. In the rare case that a member's job is delayed, a dedicated customer service agent will proactively notify the IDOC Select Plus member. If for any reason the deadline is not met, members can expect a full refund. With consistent on-time lab service, members can deliver quality service and patient satisfaction every time – guaranteed!

We want to partner with you to build a better business because we know happy patients turn into repeat customers.

When asked how this service can help to differentiate members' practices, Steve Alexander, Optical Management Consultant for IDOC Select Plus, stated that, "In the past, I typically recommended setting up a return pick-up appointment 10 days out. But now with the IDOC Select T.O.P. Service™, members can take control of their schedule even further by guaranteeing a five day turnaround. This will give them a chance to further surprise and delight their patients."

The new IDOC Select T.O.P. Service™ provides the collaborative support members expect and deserve, so that they can focus on their practice and their patients.

If you would like more information on the IDOC Select T.O.P. Service™ please contact your Essilor Strategic Account Manager or, if you would like to join IDOC Select Plus, please contact IDOC.





A Taste of the Good Life

Building your practice is as easy as putting in a plan that works



Save. Consult. Measure. Learn. Simply put, this four-point, innovative alliance membership option continues to help today's independent eye care providers grow their practices.

It's a one-stop solution that combines a discount and rebate program with practice-tracking software and IDOC consulting services that specifically outline strategies for growth and increased profitability.

It's why Dr. Erin McCleary decided to add IDOC Select Plus to her practice's playbook in 2017. "We decided to go with IDOC Select Plus because of the increased rebate potential and, more importantly, the advantage of having access to all of the practice management resources that come along with this membership."

Take for example The EDGE® by GPN, which helps members track practice data. IDOC's optical management consultants work closely with each OD to identify areas of opportunity and develop strategies that can increase revenue and profitability.

The best ideas come from brainstorming, a dialog between two people. IDOC Select Plus offers six consultant partners in the ideation, testing and implementation of new ideas.

"These tools will be indispensable when evaluating our practice from a non-OD view," McCleary says. "It will also help us be the business people that all of us independent ODs have to become to have a successful business."

Steve Alexander believes that being able to track metrics and using the data to create a strategy is one of the best allies an OD can have today. "Aside from the improved pricing and rebates, you get a team of consultants dedicated to making your practice stronger in every way," says Alexander, Optical Management Consultant with IDOC.

The EDGE® by GPN provides IDOC members with important, actionable and easy to digest data at no charge, as well as full scope, on demand consulting from a panel of experts at less than \$200 per month.

"IDOC is constantly looking to improve IDOC Select Plus by adding benefits to the membership," Alexander says.

You know what you know, so why not know more

One of things that intrigue Susan Daly, Optical Management Consultant with IDOC, is that so many optometrists believe that they do not have control over the future of their practice.

In the conversations she has with ODs, she has found that they believe outside influences limit their ability to market, grow and, ultimately decide the direction of their own business.

"What we say in IDOC Select Plus is, 'This is how you feel, but wouldn't you like to know?'" Daly says. "Wouldn't you like to know what you sold last year and to whom? Wouldn't you like to know what generated the majority of your sales? Wouldn't you like to know where your strengths and weaknesses lie?"

Without data, the knowing is impossible. Enter IDOC Select Plus. Not only does it help compile your sales data, but a team of consultants also helps review the data, analyze it and filter the information back to you in an easily digestible way.

"The best ideas come from brainstorming, a dialog between two people," Daly says. "Your idea may be shot down or it may be tested, and ultimately adopted. As an independent, that brainstorming process is stunted by the reality of isolation. IDOC Select Plus offers six consultant partners in the ideation, testing and implementation of new ideas."



Recipe for Success

Your 4-point plan
to make it happen

The tools to build a sustainable practice in today's ultra-competitive landscape are right in front of you. Here's why IDOC Select Plus matters to you:

- Save

IDOC's expansive member network translates into industry leverage. But the benefits of IDOC Select Plus don't stop with its traditional programs. A limited number of participating vendors also offer enhanced savings programs, including rebates that do not require growth, so you begin earning on the first dollar spent.

- Consult

Consultants can help overcome virtually any practice management obstacle and deliver a wealth of experience and knowledge regarding finance, staff/HR, marketing and optical management.

- Measure

IDOC Select Plus members use GPNs The EDGE to track practice data, while optical management consultants help identify areas of opportunity and develop strategies for increased revenue and profitability.

- Learn

Attend national and regional business conferences, including FREE COPE CE credits and a curriculum taught by industry experts. IDOC also hosts quarterly study group meetings around the country. These networking opportunities offer the chance to discuss common obstacles and potential solutions with like-minded ODs.



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(lifitegrast
ophthalmic solution)5%

OH, Hii

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Xiidra-ECP.com

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IDOC

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IDOC Select Plus



Bigger Savings



Clearer Insights



Better Information



Greater Knowledge

All for just \$199 per month*

To learn more, contact your Account Manager at 203.853.3333
or at accountmanagers@idoc.net.

*plus \$39 for each additional location