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Action steps for marketing a new practice

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ACTION STEPS FOR MARKETING

A NEW PRACTICE

By

DON HENKER
WHITNEY CONRAD HENKER

A thesis submitted to the faculty of the
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ACTION STEPS FOR MARKETING
A NEW PRACTICE

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Steve Fletcher

We would like to express our gratitude to Steve Fletcher for his help in designing, and completing this project. Our thanks to L. Ben Albright from Bausch and Lomb for providing us with marketing information and Allergan Inc. for sponsoring Pathways In Optometry.

Don Henker is from Claresholm, a small town in southwestern Alberta, Canada. He attended the University of Alberta in Edmonton and was awarded a Bachelor of Commerce degree with an emphasis in marketing. He spent three years in the business community as an insurance underwriter for General Accident in Calgary Alberta. He completed his requirements for optometry school at the University of Lethbridge, Alberta. He is presently a member of the optometric honor society, BSK, as well as PTU, and SOA. Don enjoys water-skiing, snow-skiing, and sailing in his free time.

Whitney Conrad Henker is from Palmer Alaska and graduated from the local high school in 1987. She received several community scholarships for her first year of study at the University of Missouri, Columbia. She completed her Bachelor of Science degree in Biology in 1991 and continued directly on to Pacific University College of Optometry. She is currently a member of SOA and PTU and enjoys sailing, fishing, and needlepoint in her spare time. Upon graduation, Whitney and Don plan to build a successful optometric practice in the Pacific Northwest by implementing their marketing strategies.

Introduction

The purpose of this paper is to provide an eye care practitioner who is just starting a new practice with a foundation on which to build and maintain a patient base. While many optometrists venturing into a practice of their own have all the necessary skills for providing excellent patient care, the concept of marketing may be just foreign enough to them that it gets neglected. Practice owners have to realize that in today's competitive health care industry, the name and the degree are simply not enough to compete anymore. There are far too many options and alternatives for those seeking vision care to ignore the necessity to bring them into the office and keep them there with aggressive marketing techniques. We hope that this paper will serve as a quick reference for those who may feel a little overwhelmed when first starting a practice and perhaps feel as though they are at the mercy of the ever-changing nature of vision care and the unpredictability of the public response to trends in the marketplace. The most important thing to avoid in a competitive environment is the wait and see approach. It is better to take action by using some of these ideas and thereby make things happen for the practice.

Preface - Third Party Plans

A discussion of marketing techniques for the optometrist should be prefaced by attention to perhaps the most important issue facing all practitioners in the United States - the third party plan. The time has come in many areas where participation in these plans is crucial to the success of the practice. All of the marketing efforts in the world will be futile if the prospective patient is obligated to go to another doctor who is going to provide their exam free of charge.

It is important to assess what is going on in the community. The number of HMO's and PPO's that are competing against practices in the area should be known. It is also important to find out which major plans are in the area and what percentage of the market they hold. A new practitioner should try to at least get to the major carriers, for example Blue Cross, Blue Shield and Legacy. Another factor to consider is how many subscribers are with each plan and if more optometrists are allowed. It is helpful to check with the professional provider relations staff at each company when seeking this information.

It may be apparent that some of the panels are not open to new providers. This situation is dictated by geographic area depending on the need for more practitioners in the area. If this is the case, it is important to be persistent and approach them at least once per month as openings may come up. It may be helpful to call several of the larger companies in the area and inquire about which plan they use.

It should be kept in mind that reimbursement may be somewhat lower than normal fees since HMO's capitate their fees and PPO's pay according to average prices. However, some reimbursement is better than none. In addition, the plan brings people in and the skill of the practitioner keeps them there and gets the referrals of their family and friends who may not be on the plans. Each plan that is being considered should be thoroughly checked into regarding reimbursement for specialty services such as vision therapy.

I. Attracting The New Patient - External Marketing

A. Advertising

The goals of advertising in an optometric practice are the same as those of any business. The practitioner must attract the attention of prospective patients, keep their interest in the office, and arouse their desire for new services and products. A large patient base is the key to a successful practice, and the skill of the practitioner alone will not bring new patients in the door.

1. Mail

One method of reaching those prospective patients is through the mail. Sending a professional letter to all residents in the surrounding area or subdivision will introduce the new optometrist as well as the practice and the services provided. Direct-mail can be helpful in targeting specific patients and their needs. The purpose of direct-mail advertising is to send a specific message directly to a specific group of patients via the mailbox. If direct-mail is to be used, a practitioner should profile all of the people in the area and determine the age, income, family, and occupational characteristics so that he or she will know how best to target a specific market and where to place emphasis in advertising campaigns. The local chamber of commerce will supply the data and community demographics.

Direct-mail productions should be targeted based on the particular area of the practice that is to be emphasized, such as specializing in contact lenses, pediatrics, or vision therapy. The practitioner must find out who the people are that he is targeting and where they are located. Mailing houses can be used to compile a list of households with individuals who may be interested in specialty services or products. The business that the letter creates from new patients as well as referrals from new patients will yield a significant return on the advertising investment for years to come.

Once the practice has an established patient base, office computers can be utilized for sorting through existing patients based on age, location, income, or any other demographics. Target mailings can be sent several times per year to specific patients regarding areas of interest. Back-to-school news can be sent to parents, and information regarding prescription sunwear to everyone. Send families information about check ups for their parents and grandparents for glaucoma and cataracts. Check the birth

announcements in the local paper and send out information to new parents about when their newborn should have an eye exam. Sending information particular to a group yields a better response to the mailings than sending it to all of the patients. The use of office computers can facilitate most of the target marketing by allowing the doctor or staff to easily categorize patients by most any criteria.

Newsletters can be a method of advertising for the optometric practice. A simple typewritten letter may be sufficient. A newsletter with personal appeal will be well received by a public accustomed to high tech equipment and automation. This can be achieved by writing a genuine letter using a font that is similar to a typewriter and using phrases like, "Dear Patient", and "Yours truly." The doctor should write the letter himself reflecting his expertise and goodwill one on one. Include items of practical information and illustrate the direct benefits of returning to the practice. It is important to mail the letter after the assistants are thoroughly acquainted with what it says and can anticipate questions. It is best to send a simple letter regularly rather than a fancy letter infrequently.

The newsletter can be sent about three times a year with a goal of keeping the doctor's name in front of the patient. If the purpose of the letter is to educate patients, they will accept what the practice has to offer and not assume the letter is just another sales pitch. Educating patients about their options in eyewear and the benefits of the office procedures is one of the most cost-effective marketing strategies. It is important to remind patients that the doctor monitors them for both ocular and systemic diseases.

Many communities have a homeowner's association, or something similar for individual neighborhoods that publish a monthly newsletter. Advertising a practice or including a letter in the community newsletter is a great way to introduce a new practice while keeping the name of the optometrist and the practice in front of the residents on a regular basis.

2. Radio

The radio can also be used as a source for target marketing. Once the practitioner has divided the target market into demographic categories based on age, sex, income, race, education, etc., then a radio station or group of stations can be selected. Radio stations are often geared toward different segments of the population so, depending on what the market niche is, (that is, the particular specialty in the vision care field that the practice is to be known for), place radio spots on stations whose programs appeal to those who

would also be interested in the practice's products or services. For example, bifocal products and services can perhaps best be advertised via radio on easy-listening or nostalgia radio stations. The service should be identified right away and repeated several times during the ad. Also, the ad should run frequently in different time slots. Usually, two or three weeks of intensive advertising followed by a break, and then another ad run is a good schedule for frequency. There are often free consultants at the radio stations to help the practitioner write the ad copy. Consider shorter slots with a brief message and address or telephone number along with the doctor's name to reduce costs. Doctors can use their own voices if acceptable and have the announcer repeat the practice name and number at the end. Another useful format is with information call-in shows where available. These could even be incorporated into a question-and-answer type ad segment. Public service messages, seasonal greetings (also on television), or just about any other excuse to put the name in front of the public can all be used with radio. Above all, whatever the message is or whatever radio station chosen, keep the ad professional and to the point.

3. Television

Television can be a useful medium in much the same way that radio is, if it is intended to reach a fairly broad geographic area with the advertisements. Cable TV is generally less expensive. Columnists or special reporters for the stations can help to increase awareness about optometry and the private practice, especially if they are doing a segment about some aspect of vision care and use your office for their on-site spot. Consider calling the stations and finding out what their policy is on topical suggestions, perhaps during "Save Your Vision Week". Also, be ready to use any current event which may have implications in vision care as an idea for clarification of the condition symptoms or long term effects. For example, if a person in the public eye has a vision problem, you could volunteer to explain detection and screening for the condition on the air.

4. Billboards

If billboard advertisements are allowed in a community, that medium may be considered. Place the billboard at the entrance of the community in a high exposure area, and create an eye catching phrase. Because people only have a moment to glance at a billboard while driving by, it is important to keep a short message limited to five to seven words.

5. Yellow Pages

Many people pick up the phone book to find services they need. The yellow pages has the potential to bring new patients to a practice. However useful the yellow pages can be, it is still a controversial source of advertisement among some optometrists. Some practitioners feel there are so many ads from commercial opticals that a small tasteful one is lost. Furthermore, some people feel it is not professional to place advertisements for doctors offices in the yellow pages. Carefully consider whether the advantages of yellow pages advertising of the practice will outweigh the disadvantages. Regardless of the extent of advertising in the yellow pages, be certain it is well designed and professional.

Keep in mind that it is easy to be oversold on yellow page advertising. The representative will want to convince the doctor that a large ad is necessary to put his name in front of the public, but these can be very expensive and in many cases, just the name and practice name could be enough. Analyze what the competition is doing before purchasing the ad.

The development of the ad is important and should not be left to the sales representative. In order to create a professional ad, make a list of all the points to be included and stress services offered. Place emphasis on the benefits of getting complete eye care from the practice, not just contact lenses or eyeglasses. The headline that grabs the attention of the customer should be the word, phrase or short sentence most likely to attract the clientele you're seeking. Be sure to include the practice name, phone number, convenient location, and office hours. If the office employs an optician, his or her name can be listed under that heading as well, and attract patients to the office who are looking for that particular service.

It is important that the practitioner know how well the current year's directory advertising is working. The office can track phone calls simply by asking "Where did you hear from us?" and determine whether or not the listing is working for the office. And on that note, it is very wise to have the receptionist keep a regular referral log sheet for all categories of advertising that done. You'll want to know as soon as possible exactly how the patients are finding out about the practice. Which of the advertising efforts is working best? Which isn't working at all? There's no sense in continuing to spend money on a medium that is yielding negligible results in attracting new patients.

6. Newspaper

Newspapers offer a wide range of marketing possibilities for the new practice. Everything from simply advertising the name, location and hours of the practice in the business directory, to writing a weekly column on vision care should be considered. If the office needs to acquire a new piece of equipment such as a field analyzer or retinal camera, it is a good idea to issue a press release about it explaining the benefits to patients. Often, efforts such as this can generate interest in the practice and in vision care in general and some local newspapers will consider doing reports on this subject highlighting a practice. Seasons can be used as an advantage when creating newspaper advertisements as many people will perceive a need for a product or service more readily if a particular time of year or event is at hand. Examples could be for special eye wear for hunters during hunting season or contact lens trial specials for the ski season.

When designing an advertisement for the newspaper there are some basic rules to keep in mind. The message should be kept simple and specific. If some benefit is being offered to the potential patient, this should be stated in the headline of the ad. Pictures and ad layout should be kept as simple as possible. The newspaper's staff or graphic artists can often assist with the final product. It is a good idea to keep track of which advertisements work best for the practice based on patient responses and thereby concentrate only on those in the future. Target marketing can be used for best results in creating interest in a product. For example, progressive lenses may best be advertised in publication more likely to be read by an older population whereas an ad for contact lenses may be better received if placed in a school newspaper. Daily or weekly newspapers work best for general marketing and smaller community newspapers are generally less expensive than more widely distributed publications. They also are more appropriate since they usually go out only to those who are potential patients in your area.

Sometimes, a well written newspaper article on one particular aspect of vision care can serve to heighten the local public awareness about the services provided by a practice. Including a human interest element in the article such as a difficult problem that was solved through the use of low vision aids or cosmetic appliances will usually increase readership. It may be helpful to consider doing a "Patient of the Month" feature in which a patient's permission is obtained to publish his or her picture and highlight some of the success stories each month.

B. Public Awareness

Other types of externally marketing a practice, though not technically advertising, may be just as important if not more important in letting the public know what is available to them. The goal with any of these programs should be to create an awareness in the public, other professionals, or local industry, that the doctor has much to offer as a professional and in many cases can assist these individuals in their work with his expertise.

1. Save Your Vision Week

Save Your Vision Week is the first full week of March of each year, and an excellent opportunity to make the community aware of vision and the services that the optometric practice provides. Optometrists generally continue advertising and discussing Save Your Vision Week for the entire month. It gives the practitioner an excellent opportunity to introduce himself and offer to give public speeches to various organizations and schools. It is important to emphasize those aspects of the profession that the particular audience will appreciate and relate to themselves the most. For example, emphasizing the relationship between vision and learning when speaking at schools or talking with groups of teachers. AOA pamphlets that include the name of the practice and the optometrist can be used to create displays in public places such as a library. Presentations at schools can include video aids and may have as a central theme vision loss prevention, but it is always wise to consider other aspects such as pediatrics, learning and vision, etc.

Speeches to special groups can be made year-round as well as during Save Your Vision Week. The optometrist must communicate that he is willing to speak to groups and schools about vision care. By writing to school councilors, principals, and directors of organizations, the doctor can offer himself as a speaker for career days, and become involved in hospital-sponsored community seminars, in health fairs. Speeches can be about topics such as eye anatomy, eye safety, or learning disabilities. By tailoring the presentation to each audience the public can learn about the optometrist and the practice.

2. Networking

Other professionals in the community can be an excellent source of referrals to the optometric practice. Endeavor to keep the lines of communication open with other professionals in the area. Educating other professionals about the services provided at the practice is important in generating referrals. By creating a unique practice in the minds of patients and other professionals, they will

seek out the practice that they perceive as "expert". Always send out written reports to the referring parties after completion of the patient encounter. A thank-you letter for the referral is always a good idea.

In order to network successfully, the optometrist must be able to provide a unique service or specialty such as pediatrics or vision therapy. Be sure to assess the competition when deciding what to emphasize in your practice. Find out what the other professionals in your area are offering and position yourself uniquely apart from them if possible. It is easy to become known as the resident expert in a particular area of vision care if you are the only practitioner offering that service.

When receiving a referral from another health care professional, even another optometrist, it is very important to communicate with them as to the fact that the patient will only be receiving an auxiliary service from your practice and that you have no intention of taking over the patient's entire care. In so doing, goodwill can be developed and a basis for ongoing referral relationships established.

Many offices actively encourage patients to refer others. When people walk in seeking only repair, have the staff person give the client the optometrist's card and suggest that the person send his or her relatives and friends to the practice.

3. Public Speaking

One way of becoming acquainted with other professionals in the community is by becoming involved in community organizations such as Rotary, Chambers of Commerce, American Business Women's Association, etc. Becoming active on committees concerned with community service, education, and publicity, allows the local optometrist to network with other professionals and spread the word about the practice. Although many doctors are involved in community politics, it may be most beneficial to the private practice to refrain from activities that are "too political" or those that have strongly opposing sides.

Many service clubs hold weekly meetings where a speaker is scheduled to give a presentation on a particular subject. The optometrist can structure his vision care presentation in much the same way as previously discussed in "Save Your Vision Week". Remember who the audience is and try to address a pertinent issue. Use video aids whenever possible and be sure to remain open for questions at the end of the presentation.

4. Screenings

Vision and glaucoma screenings are a good way to build the practice since they will directly generate appointments, create goodwill, and increase doctor exposure in the community. They are often sponsored by local schools, health departments, and service clubs. Back-to-school screenings are well received by the community and these can also include pre-school and day care-aged children. The optometrist should get to know the officials in the area who are responsible for community health. Interest can be further cultivated with school newsletters and community newspaper advertising.

A multidisciplinary screening will provide the opportunity to demonstrate expertise to other professionals and facilitate discussions regarding the importance of regular vision care with parents and teachers. Screenings could serve as a great opportunity to obtain referrals and learn more from the other health care providers.

5. Open House

Holding an open house is a good way to bring a lot of people into the practice. An optometrist can provide education, promote the practice and vision care in general, and provide a new and enjoyable experience for many people. Frequently, costs can be shared with the supplier when holding an open house to promote a particular product line such as disposable contact lenses or a new line of high end frames for the dispensary. Consider sending out invitations for the open house and offering free contact lens fitting or free pair of disposable lenses. Book 10-15 minute "appointments" for the entire day and provide refreshments and promotional materials from the supplier and your practice.

6. Occupational Vision

The optometrist should inform all major local industries if he is a specialist in occupational vision. In addition to approaching the management of the industry, newspaper columns and public speaking on this issue can put the doctor's name in front of the right people. When invited to make a proposal of what optometric services will be provided as the industry's occupational vision consultant, begin with a survey of the plant or work area to determine visual requirements, potential hazards and assess any vision safety programs already in place. Every occupation should be evaluated from the VDT users to the laborers. The main selling tool is the optometrist's expertise in the vision care field and any presentation made should reflect this. Be sure to educate

management about the value of professional advice beyond the recommendation of protective eye wear. Stress the importance of regular vision care for all employees in order for them to be as productive as possible.

With the increasing use of computers in almost every industry, particular attention should be paid to prescribing for VDT use. Visual complaints are so prevalent in this line of work that any effort made to address this problem is bound to get some response. Target the occupational health nurse for a particular company when inquiring about company policy on vision care.

II. Keeping The Patient - Internal Marketing

A. Office Design

We consider all aspects of office design as being marketing tools because everything that the new patient sees when they come to the office contributes to their experience and their perception of the doctor as a health care provider.

1. External signs

We will treat the office sign as an aspect of internal marketing although in some cases it may serve as the primary means by which a prospective patient notices the office. This is generally not the case, however, and so we are more concerned with a professional appearance for the sign to reflect a professional image to the appointed patient.

The external sign of the optometric office is very important in reminding existing patients to make an appointment and in helping them to locate the office when they come for their appointments. Visibility of the office sign is crucial. It is important to keep in mind how far the person will be away from the sign when they are reading it. In order to obtain optimum visibility the sign should have ten inch high letters if it is to be seen from 100 feet. Visibility is even more important in a metropolitan area because of the presence of so many other signs. Illumination is important even if there are no evening hours because people tend to notice signs more during leisurely driving which occurs more in the evening than during the day.

The message on the business sign should be as short as possible so it can be read at a glance. It should have the practice name as well as the doctor's name, and should describe what the practice does. It should also include products that are offered and any

specialty service to differentiate the office from an optical store. It is best to have white letters against a dark background with internal illumination.

The location of the sign goes hand in hand with visibility because even the most readable sign will be wasted if not in a location where it will get maximum exposure. It must be kept lower because it looks less commercial, but always check zoning regulations regarding size and location. Keep in mind the purpose of the sign, what it should do for the practice, and try to match it to the professional image of an optometric office.

In order to see how well the sign is working, consider including a question on the new patient history form about how the patients were attracted to the office. Not all will come just because they noticed the sign but there should be at least some people who come in just because they were looking and the sign was up front and noticeable.

2. Naming The Practice

Naming the practice is an important step in attracting new keeping existing patients. There are many offices with the word "Eye" in the name, "Eye Care Associates" for example. Therefore, it might be beneficial to keep that word out of the name of the new practice, as it is too common and likely to produce anonymity if other practices are using it. The use of the name of the city or community should be excluded because nobody has the exclusive right to it and that could again create anonymity. It is best to choose something that identifies the specialty of the doctor, or the doctor's own name with the addition of a more general practice name such as "Family Vision Care" or "and Associates". Nobody else can use your given name and once you become known to your patients and others in the community, you will be referred to by your name. It is much easier for a new patient who has been referred to locate the doctor if the practice goes by his or her name.

3. Lighting

Lighting within the office is an important factor in making the patient feel that he is in a modern professional atmosphere. Emphasis should be placed on proper office lighting, lens centers, and children's' areas. The dispensary should use a combination of incandescent and fluorescent lighting for more intense or whiter light on the frames and a softer light on the general area. Exam rooms may have fluorescent lamps for general lighting and incandescent

lamps that can be dimmed for low light procedures. Indirect lighting in the patient corridor is a nice detail.

4. Eyewear Displays

The design of the dispensary must look great to the patients, and give them the feeling that they are in the best, most professional place in town. It should look as modern, clean and spacious as the dispensaries in better chain stores because patients believe that if the office looks modern, the practice is modern. Patients should feel free to browse in the dispensary while waiting for their exam. It is more comfortable to browse in a roomy, spacious dispensary than a tight crowded one. The best carpet is a neutral color that blends with the rest of the room and hides dirt. A commercial grade will achieve this effect. Warmer fluorescent lamps will enhance the patient's features. By situating the dispensary adjacent to the waiting room, the layout will enable the patient to feel comfortable browsing around and will advertise the dispensary's capabilities. Some offices include a "lens center" in the dispensary to promote certain lenses, or specialty frames. Lens companies can offer support with promotional aides that help achieve the sales goals of specialty products.

5. "High-Tech" Equipment

Many successful practices have high-tech and automated diagnostic instruments and furnishings in a data collection center. Patients are impressed and equate the presence of the equipment with better care, especially if the function of each particular instrument is explained to the patient. This area should be visible to the patient in the waiting room, as it reinforces the high-tech perception. Since equipment is such a large investment, it should be promoted. By using automated instruments, the patients' chair time can be minimized. A rotating table can be incorporated into the high tech area to maximize space by centralizing three or four instruments and allowing the assistant and the patient to be positioned at one location.

A motorized window cover can be used to optimize space in the exam room. It is a masonite panel that rolls on a metal track to cover or uncover a window and it is controlled by a switch. Uncovered, the patient is able to look out the window at the outdoors. It gives the feeling of natural spaciousness which can be beneficial when trial framing a distance prescription. When the window is covered by the panel the space can be used as a projection

screen. Trial framing through the open window will result in a more realistic distance Rx than a regular exam room.

Video slit lamps can also be used as a high-tech tool to promote business and educate and document patients' contact lens fitting characteristics and ocular conditions. Instant playback is an added feature that allows the patient to see what the doctor is trying to explain. If the patient better understands a condition, he is most likely to comply with the suggested treatment. The video slit lamp can also come with other attachments. A video printer is available to develop instant photos of a condition, and there is a floppy disk recorder to store still photographs for future viewing.

Equipment purchases are considered marketing expenses. Keep the high-tech equipment where the patient can see it, watch it be used and ask about it. Since the majority of patient education is done by the staff, it is important to give them carefully scripted educational messages to deliver. Patients will only realize the benefits of a piece of equipment to their complete vision care if the use of the instrument is explained in lay terms. When automating a function, whether it be a new autokeratometer, visual field analyzer, or automated lensometer, be sure to perform it on every patient. The doctor will be providing better care and the staff will have another chance to impress the patient with the high quality of care being provided. When purchasing new equipment, feature it in the office newsletter or on the telephone hold system, and stress the direct benefits the equipment will have to the patient.

When deciding which equipment to have in the office, consider those that serve two or more purposes, and those with a printout. Items that are considered essential include: autolensometer, autorefractor, autokeratometer, auto visual fields tester, non-mydratric retinal camera, and non-contact tonometer.

Once it has been decided to lease or buy a piece of equipment, adjust the exam fees accordingly. Attend trade shows to compare equipment, and budget several years in advance before purchasing. Suppliers are there to help the practice and they may be able to assist with better terms or leasing if they know the office is interested in equipment.

6. Child Features

One way to make a practice parent-friendly is by offering a play area for children in the waiting area to occupy their time while their parents are being examined. It is a good idea to have the area located between the reception area and the glass enclosed pretest area so parents or staff can see what is going on at a glance. An

example of one design is a low bench all the way around the perimeter with sections of the bench that open as a toy box. The toy box can be filled with educational and developmental toys, books, puzzles, coloring books and games. Be sure to choose toys that are safe for one year olds and up. The AOA library can be a source of childrens' videos related to optometry. Videos can provide hours of entertainment for kids, and possibly quiet the child who likes to make a lot of racket. Be sure to remember to keep any electrical outlets high up and out of reach of the kids. It may be helpful to keep stickers, small toys or lollipops on hand to reward a good kid or bribe a bad one.

Another idea for the parent friendly practice is to have an area of childrens' frame selection. Glass shelf displays are not recommended. Kids like to look at pictures of other kids, and a bulletin board with pictures of kids who wear glasses is one way of getting the child interested in picking out frames, as well as wearing them himself.

Finally, offering a changing table in the public restroom equipped with diapers and moistened towels is a nice gesture.

7. Layout

It is necessary to have adequate space to accommodate patient files, general files, office machinery and equipment and general office supplies. There must be room for staff circulation and privacy for patient payment. Larger pretesting areas and separate contact lens and dispensary areas result in a big increase in square footage up front. Patients feel more at ease when they are free to browse and ask questions. The receptionist's area should have more than 180 degrees visibility from the front desk, with a view of the pretest area, exam rooms, reception area, entrance, and dispensary. The receptionist directs the flow of traffic for the entire office and so should be right up front to greet arriving patients promptly and professionally.

B. Office-Patient Interaction

Separate from all the "hardware" in the office is the patient's experience in coming to the office. How easy is it for them to keep their appointment and how are they treated once they arrive? These are some of the most critical questions that an eye care practitioner can ask himself. Always try to think of the patient's visit to the office from their point of view and do everything possible to make it pleasant and effortless for them.

1. Hours

Many families today have both parents working, and it can be difficult for them to juggle work with their doctor appointments. Providing convenient hours for working families is one way to make the practice parent friendly. Some doctors feel it is beneficial to the practice to provide an average of 2.5 evenings a week in addition to Saturday hours.

2. Dress Code

To be perceived as an eye care professional, it is important that everyone in the office looks the part. Groomed hair and facial hair, good hygiene, long sleeves, and possibly lab jackets monogrammed on the pocket can all aid in projecting a professional image. There should be some standardization of the dress code for employees so they know what is expected and conflict is eliminated. Usually, medical office uniforms provide an easy solution in that they are easy to obtain and always look very professional.

3. Telephone

The telephone system in an optometric office can be used as a source of advertising within the office for generating patient information about services and products. One method employed by optometrists is information for the patient on hold. The office can make use of the telephone as part of the office information center by combining easy-listening background music with an informal, friendly message that is both interesting and informative to the caller. For example, the system could be six messages on a continuous tape that runs six minutes without being repeated. In that case, it is unlikely the patient would have to hear the same message twice.

If this method of advertising is employed it is important to change the messages regularly in order to stay current with the newest innovations in optometric care. Topics discussed could include low vision, vision therapy, advancements in contact lenses, office hours, sports vision, progressive add lenses, and pediatrics. All that is required for this system is a tape recorder and adapter that can be plugged into the established telephone system. There are also various companies that can help put together professional sounding messages.

State-of-the-art one year packages from a marketing consultant may include four professionally recorded tapes with an update every three months, and a tape player that hooks into the

phone. It is also possible to produce a tape on one's own at a sound studio at hourly rates.

In some larger optometric offices it can be beneficial to handle a heavy patient load of calls with a call routing system. Patients can get what they want faster. This addition to the phone line can be expensive, so it may be beneficial to monitor the number of calls for a few weeks to see if it warrants the investment. Some offices also include message taking systems or voice mail. Callers can place messages any time in any staff member's electronic mailbox, 24 hours a day. This extra addition to the phone system can also be expensive. Fee lines can also be added to the phone system to relay information about the practice's statistics via a detailed recorded message. Hours, payment options, insurance policies and fees can be included on this separate telephone line. In order to set up this service for the practice, a professional recording, dedicated phone line, and an answering machine are necessary. The office may have to consider additional lines for fax and credit card approvals as well.

It is important to have a way for patients to reach the doctor in emergencies or leave important messages after office hours. Answering services and machines can serve this purpose. Be extremely selective if choosing an answering service. Call the service to see if messages get through quickly and accurately, and visit the service office to determine if the employees are pleasant and polite. If using an answering machine message, be sure that it is friendly, efficient and professional. Listen to it to see if the quality is good, and that it picks up promptly. Voice activated units are generally the best since they decrease the likelihood that the caller will be cut off.

4. Recalls

Much of the success of the office recall program lies in the initial patient encounter. When new patients switch offices, pay attention to what displeased them about prior care. It takes constant effort to maintain an attractive office and caring staff that makes patients want to return. Have new patients fill out a "Welcome to our office form" and list all family members. Give the patient an overview of all the services available to him and his family members such as contact lenses, low vision, pediatrics, geriatrics, disabled vision exams, vision therapy and other specialties. It is likely that each new patient who comes to the office has a friend or a family member that could benefit from some other service provided at the office.

Discuss current test results with patients and the future possibilities of those results. Give verbal descriptions of a patient's condition with diagrams, models, brochures, and explain what must be followed up on at the next exam. Make sure they know why and when they are expected to return. At recall time, the receptionist repeat this information when calling to confirm the exam appointment.

It is important to inform the patient how he will be reached when it is time for the next exam. Put the next exam date on any brochures handed out, Rx card, or superbill. Mail two copies of the patient's insurance application form a week before the exam month so each family member has time to order and receive his or her benefit form early. Some doctors set the appointment date and time for the next exam at the end of the first one. One month before the next exam date, the office sends the patient a card in the mail reminding him of the appointment. Many doctors feel this is the best method of recall. In this way, the patient can be told as they leave the office that they will not have to worry about remembering to make their next appointment. They are reassured that they will receive reminder cards or telephone calls.

Telephoning works far better than mail recall alone, but a combination of the two methods works the best, especially in the evening. Hire a person to make calls from 5-7pm. The callers duties include making exam appointments, verifying the exams for the next day, vision therapy visits, making appointments for dispensing and contact lens fittings, as well as inquiring how the patient is enjoying their new eye wear or contact lenses. The caller also makes notes of any questions the patient may have for the doctor to answer. If and when the patient refuses the exam, the caller will ask why, note the reason on the patient's chart, and call at a later date if the patient wishes.

Finally, consider conducting patient exit surveys periodically where the patient is given a short questionnaire as they leave the office. They should be told that it can be filled out at home and postage is included. The form should include questions and space for comments about quality of care received, convenience, easy access, and any suggested improvements. This is just one more way to make the patient feel that they are important, and you may discover an aspect of the practice that needs restructuring.

5. Suppliers and Sales Representatives

The optometrist should take advantage of the knowledge of sales representatives since they are very in touch with the industry.

They are knowledgeable about what is currently working in the marketing of eyecare products. Some provide in-house training on how to present new products to patients. Their companies often conduct surveys which the optometrist can draw on to show patients the benefits of a particular product such as disposable lenses or lens coatings.

6. Brochures

Many OD's don't have the time or background necessary to handle their own public relations, nor do they recognize the many ways to keep a high profile in the community without resorting to price advertising. The AOA order department can be a source for the optometrist to obtain materials that range from informative brochures to stationary. The AOA can provide the doctor with material such as multifocal lenses, vision therapy, spots and floaters, color deficiency, and dry eyes, as well as material that emphasizes the optometrist's role as a primary care provider. There is also a standard AOA referral form available to the optometrist. It can be impressive to patients to use this material as the AOA carries authority and implies an unbiased point of view. Keep a complete set of brochures in the reception room so the patient can pick and choose, and hand out relevant brochures as part of the patient education process.

The AOA also has a great deal of visual aids that can help a public presentation, including slides and other materials from (ILAMO) International Library, Archives, & Museum of Optometry. There is information on sports vision, family eye care and children's vision, occupational vision, protective eye wear literature, and other pamphlets.

Patients read only what concerns them directly so it is important to keep the brochures short. They can be used to improve communication with the patient. Sometimes printed clarification is essential for hard-to-explain cases. Printed material can also help reinforce the need for multiple prescriptions. Brochures can help promote primary care optometry and reinforce the fact that optometrists check more than prescriptions for eyeglasses. Pamphlets reach other members of the family, those who have never been to the office as well. Pamphlets give authority to your advice and demonstrate your interest- that extra step to show that you are concerned. By making good use of them, you will cultivate appreciative patients and save yourself some time.

Conclusion

The new venture optometrist or established practitioner wanting to augment his practice should now have an assortment of tools and ideas with which to develop a proactive marketing program. It may be wise to lay out a time line or marketing calendar for all of the implementations so that adequate planning and preparation time is allotted.

Above all, flexibility is key. As the marketing manager for the practice, the doctor will want to constantly monitor every single marketing effort for effectiveness, both from a cost standpoint and from practice building criteria. Those techniques that are working should be retained and enhanced, and those that are not should be discontinued. Eventually, a program will produce some core elements which are proven effective but thought should always be given to the potential for further growth.

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