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+ **MEET & GREET RECEPTIONS** that make a winning first impression

IS INDEPENDENT EYECARE DYING? **ECPs** say not on our watch

ELEMENTAL TITANIUM specs and **SUSTAINABLE** suns that are far from basic

INVISION[®]

APRIL 2022

THE MAGAZINE FOR THE AMERICAN EYECARE PROFESSIONAL

THE BIG STORY

Laughter is the best medicine and we've got 20 tips to keep you LOLing all the way to the bank

Funny Business

The model wears the PURE P-3015 from Marchon.

MARCHON

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Marchon NYC Eyewear is inspired by diversity and inclusivity. We provide diverse styling, while using high quality materials that feel as if your eyewear was Made for You. Our designs range from core classics to current fashion trends, all offered at an affordable price point. We focus on helping you find your fit while keeping style and functionality top of mind. Put your best shape forward with choosing eyewear that enhances your greatest features.

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BUTTERFLY**

**HIP TO BE
SQUARE**



CATS EYE VIEW



**NOT YOUR AVERAGE
RECTANGLE**



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THE MAGAZINE FOR THE AMERICAN
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APRIL 2022

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This Chicago OD had a solid reputation for eyecare but didn't feel complete until she opened a space in which to curate a spectacular frame collection... in just 950 sq. ft!

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Carissa Dunphy is an optical multihyphenate who loves data, industry collaboration, her rowing machine and some seriously comfy pants.



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KNOWLEDGE = PROFIT
11 datapoints you need to be collecting from your healthcare consumers to help you target your marketing and tailor your services.



ON THE COVER: The model wears the Pure Eyewear P-3015 in lavender, a minimal rounded square, from Marchon. MSRP: \$213 marchon.com



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/bulletins
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Salvatore Ferragamo



ANNE KLEIN





Salvatore Ferragamo

THE MULTICOLOR EYEWEAR CAPSULE

A new sustainable story that celebrates the importance of color in the Salvatore Ferragamo world.

A unisex style suiting both men and women, made of 45% sustainable plant-based resin, bio based lenses made from an ecological resin and combined with an eco-friendly packaging made of recycled PVC.

The project is part of the Maison's digital platform called "Sustainable Thinking" dedicated to all the sustainable products of the Brand.



SUSTAINABLE
THINKING





MCM



The aviator that defies gravity with ultra light Magnesium alloy material! Durable, light weight, corrosion resistant, and hypoallergenic: these are the main benefits of the Magnesium Alloy material. The iconic aviator embodies the values of the brand, being fashionable, functional, comfortable and super light.

Created for the contemporary and confident consumer with a strong taste for excellence and precision, this style features ultra fine front and temples, very trendy matte colorations and made in Italy qualitative standards.





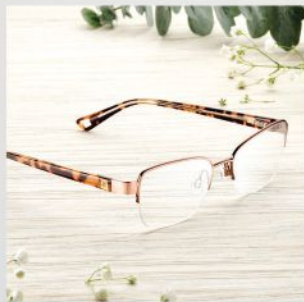
Learn more about the Anne Klein Bio-Based product at <http://marchoneyewear.com/anneklein/biobased.html>



ANNE KLEIN

Today more than ever, we believe design is about more than simply meeting women's fashion needs. It's about taking a thoughtful approach, thinking about tomorrow as much as today, and trying to minimize our environmental footprint.

Select Anne Klein frames are made with a Cellulose Acetate featuring over 60% Bio-Based materials, a more natural alternative to traditional plastics.





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EDITOR'S NOTE

5 SMART TIPS FROM THIS ISSUE

1. Do you include a link to pay in your text reminders? Maybe you should start studying a revamp of your communication system now. (*Managers' To-Do*, page 26)
2. Specialties are where it's at ... and neuro-optometric rehabilitation is in demand. (*Better Vision*, page 38)
3. To TikTok or not to TikTok? We help answer the question. (*Ask INVISION*, page 64)
4. First impressions are important. How does the reception your business gives stack up? (*Benchmarks*, page 68)
5. Worried that independent eyecare is dying? Hogwash! Hear what your peers really think. (*Buzz Session*, page 72)

LAUGHTER AND TATTOOS

Nothing is really permanent ...

"Maturity is a bitter disappointment for which no remedy exists, unless laughter can be said to remedy anything."

— Kurt Vonnegut

For my 37th birthday I treated myself to a tattoo. Being that I was well into adulthood and thoroughly unimpressed with the experience, this quote from *Cat's Cradle* really spoke to me. Do not ask me why I felt the need to print it indelibly on my body, where it is, or ask to see it ... it will creep me out. You'll just have to take my word for it. The tattoo may have been foolhardy but I stand by the sentiment, "laughter can remedy anything."


It has been a rough couple of years — and challenges remain — but humor has gotten many of us through it. I understand that people are more mindful now and things we once didn't give a second thought to laughing at are no longer appropriate — let's be honest, they never really were — so it can be a minefield out there. But the solution isn't to abandon laughter; it is to get better at what we're laughing at. To that end, we've provided a primer for humor at work in our Big Story on page 42.

Clearly, I have a healthy appreciation for humor in life *and* in the workplace and what's funnier than *data*? I'm being a bit facetious here but data is actually important to humor. The comedic greats are always collecting data to fine tune their bits and you should be doing the same in your business. Our Special Feature (Knowledge = Power on page 50) tells you not only what data you should be collecting (hint: you likely already are) but how you should be using it... and *that's* the pay off.

Miraculously, Dr. Steve Vargo seamlessly combines these two themes in his column on page 60 talking about the use of humor to collect data! Amazing.

Nothing is permanent — even tattoos — comedians know this and they are relentlessly refining their acts. Yes, and ... An eyecare business needs to be doing the same; constantly collecting data and improving how they use it to create a better experience for their patients and customers.

Best wishes for your business,

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Dee

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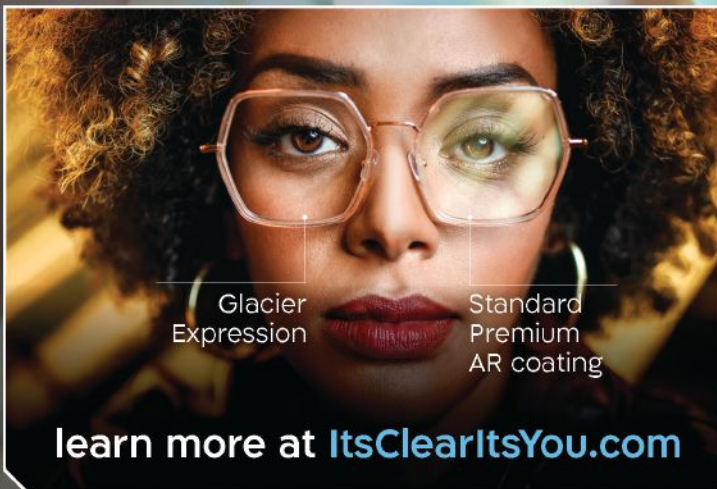
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Inbox / Our Readers Share Their Thoughts



→ That story about websites was enlightening. The reality is we need a digital presence to be noteworthy and make a mark. A great website speaks to your ideal patient and fills your schedule while you sleep. You have control over your website. Why do so many people put so much time and energy into creating content on digital platforms they don't own like Instagram, Facebook, Twitter and YouTube? At any moment, these platforms can shut down your account. We invested hours on YouTube only to find that every single ad shown on our videos was to "buy glasses online." We

pulled those videos and now send a direct link to our patients. **Diana Canto Sims, Buena Vista Optical, Chicago, IL**

→ The recent article prompted me to give our website a new look and refresh the content. It had been a while! **Amina Ebrahim, OD, D Vision Eyecare, Allen, TX**

→ SEO optimized websites that are generic and use stock photos help practices that put time and thought into website design gain new patients. **Jason Klepfisz, OD, Urban Eye Care LLC, Phoenix, AZ**

→ It comes in handy to have a good IT resource. I would rather pay my

IT partner to fix my site than pay a ransom when it gets hacked. Worst case, if you know your website content/design, or even better have a backup of it, they can just recreate it. If you have a WordPress site, it's pretty much guaranteed that you will be hacked at some point. **Sarah Brozzo, Harrison Eye Care, Harrison, MI**

→ INVISION always has insightful feature stories. I always take away great tips and suggestions for our practice. Thank you for being our favorite in-

dustry publication! **Rita Ellent, OD, The Gardens Eye Care, Forest Hills, NY**

→ Great article and food for thought and evaluation of our website today and in the future. Thanks for the great industry and marketing articles. Keep up the amazing job; look forward to the magazine each month! **Verbelee Nielsen-Swanston, Oxford Eyes, Orlando, FL**



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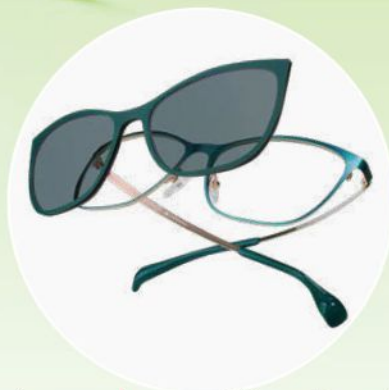
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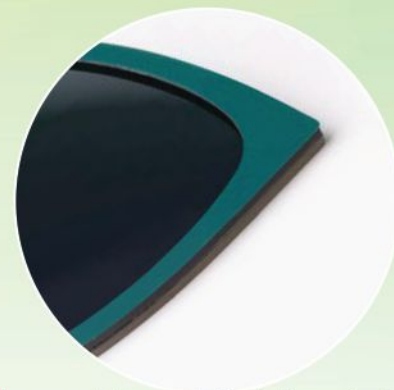
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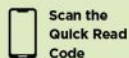
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Podcast

TECHIFEYE

1. Don't miss our latest podcast episode, featuring TechifEYE. This OD-founded alliance of technology-driven companies and preferred partners is bringing the latest in revenue generating technologies to independent optical practices.



Brain Squad

BUZZ SESSION

2. See all the Brain Squad responses to this month's Buzz Session question: Do you believe independent eyecare is dying?



Products

HOT SELLERS

3. Each month, INVISION tells you about the products that are selling briskly, based on our Brain Squad survey. INVISION Online brings you even more of the products that customers love.

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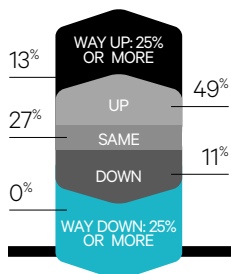
INSPIRATION

EYEGLASSES
go to page 30



FIT CHECK

Oakley launched the newest chapter of their “Be Who You Are” story, which showcases the new 2022 Bike Collection. As part of the campaign, Oakley partnered with cycling group Fixie Fit to explore not only their skills on a bike, but the ways that each support, value, and empower their communities off it. Fixie Fit — members shown here wearing the Road Cycling Collection — is a South African-based, urban bike crew made up of artists, directors, and local fashion designers. Since its inception, Fixie Fit has grown into a community of riders that highlights diversity and inclusivity within BMX. The newest chapter of the “Be Who You Are” bike campaign can be viewed on Oakley’s Instagram and YouTube channel. Prices vary, oakley.com



MONTHLY SALES SURVEY

How were your overall business revenues in February compared to the same month in 2021?

TOP-SELLING VISION BRANDS FOR FEBRUARY*

EYEGLASSES: Ray-Ban (15), Tom Ford (7), Gucci (6), Oakley (6), Etnia Barcelona (5), Kate Spade (4), MODO (4), OVVO

(4), Barton Perreira (3), ECO (3), Flexon (3), Lindberg (3), Prada (3), Silhouette (3)

SUNGLASSES: Ray-Ban (25), Maui Jim (21), Kate Spade (6), Oakley (6), Gucci (5), Costa (4), Nike (3), Tom Ford (3), Etnia Barcelona (2)

*These are brands mentioned by multiple Brain Squad members when asked what sold well in February. Join at invisionmag.com/brainsquad.



MAY BIG DATES



1 Before **NATIONAL LOYALTY DAY**, send something like a special "\$50 off, no minimum required" coupon to your 50 best customers. Be bold with your offer — you can trust your best customers not to abuse the privilege. Just

be sure they understand this is a special insider perk. Everyone wants to feel like a VIP.

3 **NATIONAL TEACHER DAY** is a terrific goodwill opportunity. Donate one of your nicer frames as a com-

plete pair plus an exam and fitting to a teacher who has won a recent award. Alert the local media and then arrange a time for that teacher or coach to come to your store to receive their prize.

17 **WORLD HYPERTENSION DAY**. A chance to remind your clients to have their blood pressure and eyes checked regularly. High blood pressure is a leading cause of retinopathy, optic neuropathy and other vision disorders.

25 Let's be honest, there aren't many geekier than eyewear people. On **GEEK PRIDE DAY** hold a roundtable to bring together these kindred spirits to show off and discuss the latest vision trends and your most recent inventory.

MANAGER'S TO-DO LIST

“ Work on housekeeping and cross training. We test our staff to keep them up to date on new technology and products in our office. We also set goals each quarter and check to see how they are going.”



Heather Aites, Family Vision Center, Westminster, CO

WEEK 1

MAY 1-7

MANAGEMENT

If summer is a busy period for your practice, ramp up cross training and lock in vacation requests now.

WEEK 2

MAY 8-14

MARKETING Finalize plans for summer trunk shows or other events. Confirm dates with vendors. Planning your catering now will allow you to negotiate volume discounts when multiple events are booked.

MANAGEMENT If your typical response to handling day-to-day affairs is, "Let me take care of this," then try this experiment: For the next two weeks, free up two hours a day just to manage. Delegate some admin work, drop less important meetings and spend the extra time giving more guidance to your team. You may find the extra productivity far outweighs your "lost" hours.



WEEK 3

MAY 15-21

MERCHANDISING To help you freshen up your window displays — it is spring after all — tap your vendor reps to see what they can offer you in the way of displays and customer giveaways. It's always smart to "be nice to your patients and give things away," says Caitlin Wicka of San Juan Eye Center in Montrose, CO.

COMMUNICATIONS A recent survey of small healthcare providers by SMB Communications found 61% of patients are more likely to pay their clinic bill if they receive a text reminder with a link to pay, and 58% of patients consider filling out paper forms

"old fashioned." If this feature is missing from your operation, start studying a revamp of your communication system now. The more digital-native demographics coming to market don't have the patience for legacy systems.

WEEK 4

MAY 22-28

INVENTORY It's been almost two months since Vision Expo East. Scrutinize the sales data of product brought in from VEE to see if it's going to be successful or not.

TRAINING Get your salespeople to brush up their customer approaches with Harry Friedman's "Opening the Sale" game from his *Selling Games & Contests* book. Pairs of salespeople face each other with each side taking turns delivering a *fresh* opening line. Fail to come up with one and you're out. Last person standing wins. Rules: The lines must have nothing to do with business, should generally be questions, and should encourage conversation.

MONTHLY PROJECT

Formulas for Success

One of the appeals of digital marketing is its trackable ROI but if you're not analyzing your metrics, your marketing efforts might be getting lost in all the noise.

Most metrics are considered

level-one: followers, impressions, reach, likes, comments, and clicks. While helpful, these offer a snapshot in time.

For growth and optimization, look at level-two metrics. These are about using data to pinpoint what your audience loves (and ignores). Growth metrics show the change of a metric, e.g. follower

growth shows how your follower count changes over time. Here is a simple formula:

$$\text{Growth \%} = (\text{Metric at Time 1} - \text{Metric at Time 2} / \text{Metric at Time 2}) \times 100$$

If you ended Oct (Time 1) with 950 followers and had 710 followers in Sept (Time 2), your follower growth rate would be 33.8%. Other

IG metrics to track for growth: impressions, reach, clicks, and replies.

Rate metrics give you a percentage to help you understand one metric relative to another. E.g., interaction rate is the percentage of your followers that have interacted with your post, story, or IGTV. The formula:

$$\text{Rate \%} = (\text{Metric (e.g., num-}$$

ber of interactions on a post) / Follower count when the post was published) x 100

If you have 950 followers and a post received 175 interactions, that post's interaction rate is 18.4%.

Start with these basics before a social media campaign because analytics without context don't help you take action.



rag & bone

NEW YORK

This pair of sunglasses is manufactured using the highest quality bio-acetate, obtained from natural and renewable resources rather than using petroleum-based fuels.

Wear, re-wear, and pass down.

Hot Sellers

BRAND RESULTS ON PAGE 25



VERA BRADLEY

The Vera Bradley Christina sports a classic full-rim rectangular shape in a lightweight, lustrous acetate. The temples gently curve inward and feature spring hinges to keep them comfortable and secure. Available in seven colorways, Imperial Rose is shown. MSRP: \$179.95

→ The **VERA BRADLEY** Eva and Christina sold well in optical, and the Dina in sun. *Barbara Bloom, OD, Weber Vision Care, Harrisburg, PA*

→ **KATE SPADE, STATE** and **OGI** all did well in optical. They are fun and fresh; people love them! In sun, Nike is a constant favorite for guys,

and the **OGI Shimmer** line for the ladies. They love the sparkle! *Deb Wood, Wood Vision Clinic, Iowa Falls, IA*

→ **TIFFANY** opticals, thanks to a frame reset by Luxottica, and **RAY-BAN** aviator suns. Patients came in asking for them. *Pamela Marzec, Marzec's Specs, Streamwood, IL*

→ **UBER** in optical and **JIM-MY CRYSTAL** in sun. *Chris Gregg, Inver Grove Heights Family Eye Clinic, Inver Grove Heights, MN*

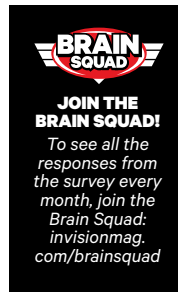
→ **ETNIA BARCELONA** in optical and **MAUI JIM** in sun. *Shawndra Frasier, Taylor Optical, Salt Lake City, UT*

→ **ARISTAR** and **SUPER-FLEX** opticals, the style and price point work in our ophthalmology/optometry practice. *Miguel Rodriguez, Fava & Maria Eye Associates, Lebanon, PA*

→ The **VERNON**

GANTRY Peeler XL is a great seller in all the colors; can't beat a 57-eye size and affordability. *Larah Alami, OD, Hudson River Eye Care, Tarrytown, NY*

→ **KALA EYEWEAR, I-DEAL OPTICS** men's, thanks to new colors, and **ANGLO AMERICAN** vintage eyewear. *Barbara Solomon, Solomon Optical Company, Minneapolis, MN*



→ **OLIVER PEOPLES** in optical. *Randy McMurry, MyEyeDr, Birmingham, AL*

→ **KLIIK, OVVO** and **LEGRE** opticals; blues and reds are popular now.

Each issue, INVISION surveys ECPs around the country about which vision products are selling best in their stores/practices. Then we calculate the results and share them with you to give you a gauge of front-line sales activity across the United States. To take part, go to invisionmag.com/brainsquad.

Kathryn Collins, OD, Kissel Eye Care, Lititz, PA

→ We brought in **PARADOX** and our patients are loving the fun colors and optical shapes. They are appealing to both younger and more seasoned customers. *Frances Ann Layton, Eye Associates of South Georgia, Valdosta, GA*

→ **FLEXION** based on insurance incentives and durability. *Robbi Marcin, Dr. Robert F. Marcin, O.D., Tamaqua, PA*



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BY RACHEL BOZEK



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4

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BY RACHEL BOZEK



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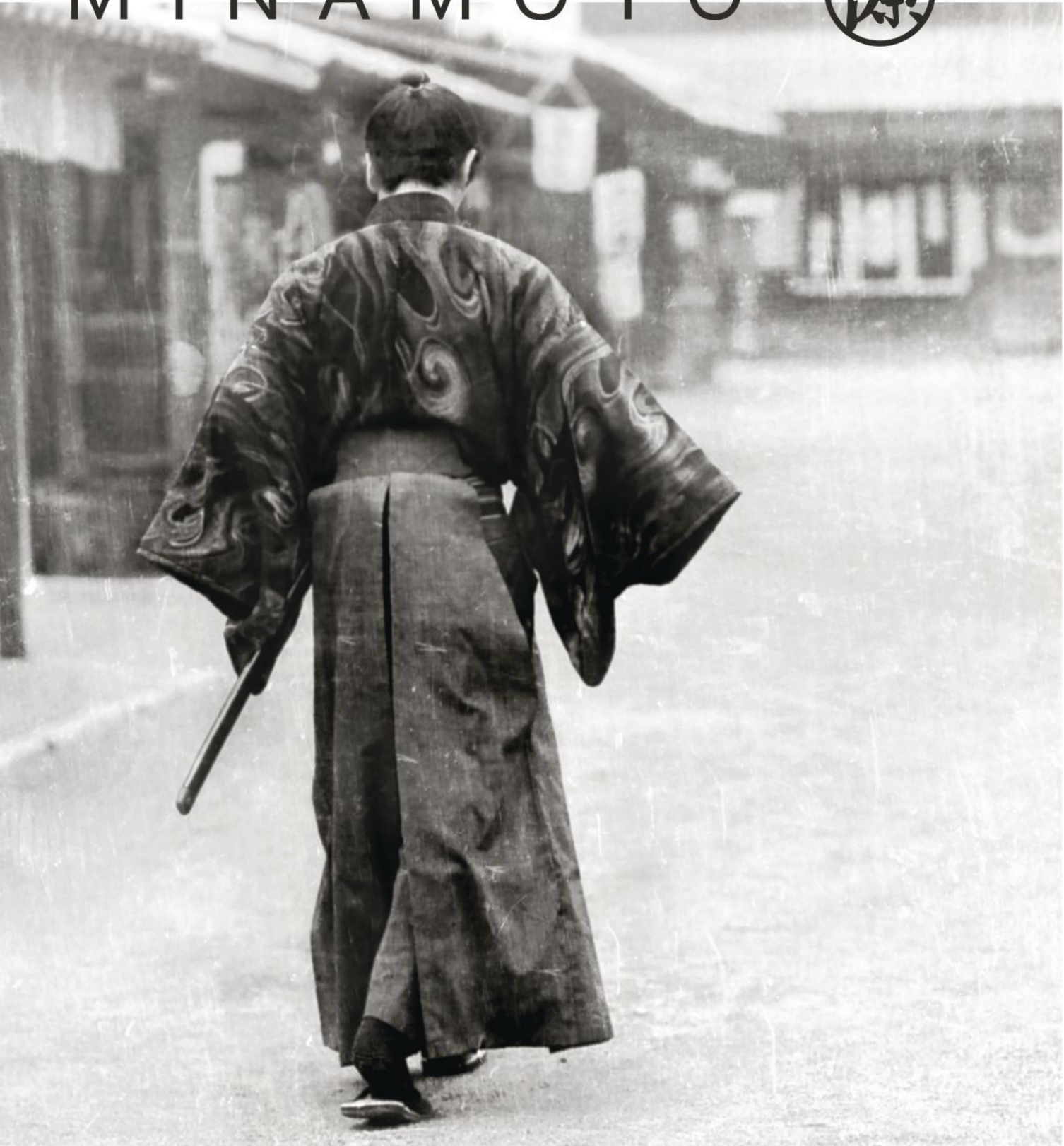
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Smart Ways to Use Neuro-Optometry Tools on Patients

CHARLES SHIDLOFSKY, OD, FCOVD

Neuro-Vision Associates of North Texas, Plano, TX



► We assess all patient types: pediatric patients with developmental vision problems; those with a brain injury; and athletes

who have concussion. In addition to a traditional eye exam, I initially do a neuro-optometry evaluation of their binocular vision, ocular motor vision, and visual spatial skills. If a person comes in for a neuro-vision evaluation I would also test balance, cognitive skill and eye tracking ability. If there's a neurological problem, I'll do a VEP or ERG (electroretinography) test using LKC's REteval handheld device. I use Cognivue for cognitive evaluation, RightEye for sensory motor testing, Balance Tracking Systems' BTracks to check balance and a WAVi scan to measure brain waves. I give a realistic expectation upfront saying we'll try to get them back increased functional skills.

TANYA POLEC, OD, FCOVD

Vision & Balance, Tucson, AZ



► My patients usually have some type of brain trauma. We evaluate visual system function and integration with body and

brain. We use RightEye to monitor how the eye tracks and follows objects; a VEP test from Diopsys that examines whether the brain processes information at a higher level of intensity when the patient wears prism glasses; a binocular vision assessment program from HTS Home Vision Therapy; Bernell's FCFTester to evaluate the functional peripheral field; and the Reflex Pro to assess pupil response to colored filters. BTracks evaluates the risk of a fall. Therapy takes three to nine months, during which we re-train the brain to teach the visual system and the body to work more effectively.

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CIRCADIAN RHYTHM AND AGING EYES

► Bright light helps us see better, but our eyes need darkness for better vision. Daylight breaks down the sensitive machinery

of our eyes, and during night's darkness, key pieces are rebuilt. Researchers at Purdue University have found that if the circadian rhythm that runs this process is disrupted, our eyes may be at greater risk of retinal degeneration as we age. The team studied the eyes of *Drosophila* flies, a common model for the human eye, using multiple time points during aging, and found the disruption of circadian rhythms is associated with the onset of several age-related eye diseases in humans. invisionmag.com/042202

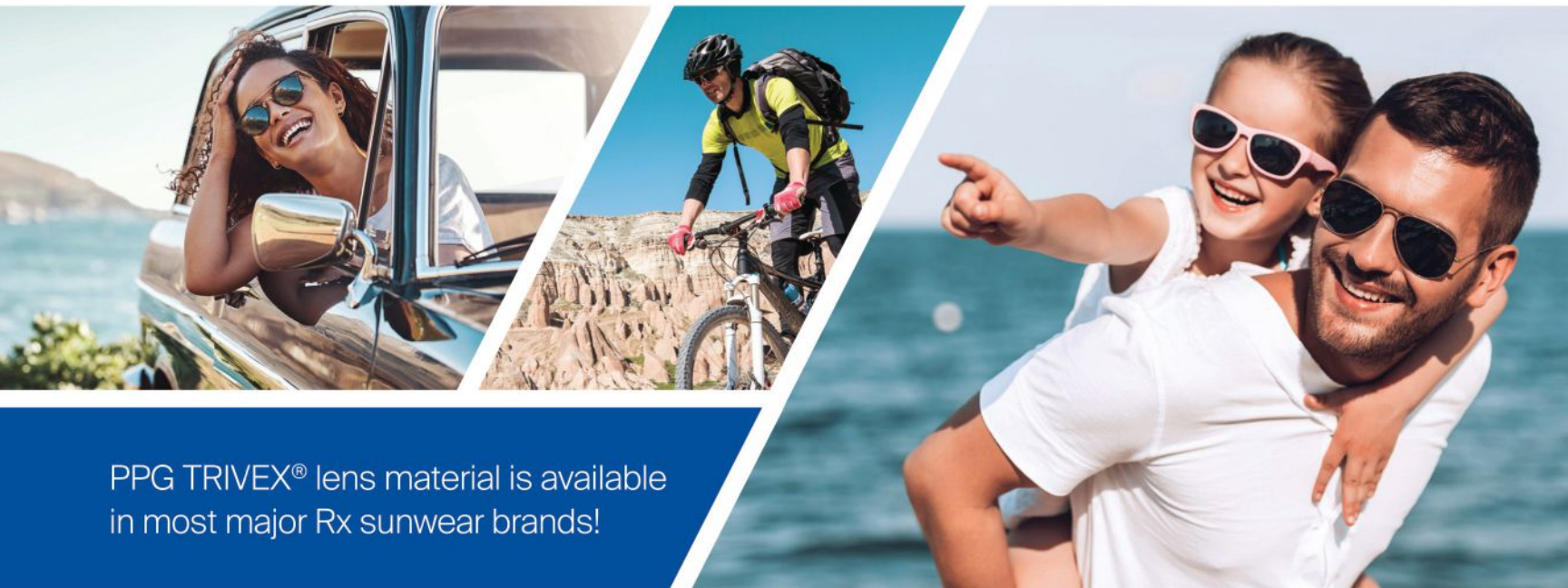
NRF SEES 6-8% RETAIL GROWTH

► The NRF anticipates retail sales will grow 6-8% in 2022. It forecasts sales will total \$4.86-\$4.95 trillion (excluding car dealers, gas stations and restaurants). Non-store and online sales, which are included in the total figure, are expected to grow 11-13% to \$1.17-\$1.19 trillion as consumers continue to utilize ecommerce. The 2022 figure compares with 14% in 2021, the highest in over 20 years. This year's forecast is notably above the 10-year, pre-pandemic growth rate of 3.7%. The NRF attributes this to anticipated strong job and wage growth and declining unemployment. But it projects full-year GDP growth will slow to around 3.5%, given inflation, tighter monetary policy, and less stimulus. nrf.com/state-retail-and-consumer-2022

5 KEY TRENDS FOR GROWTH

► PatientPop's 2022 Healthcare Marketing Trends whitepaper identifies five trends that will drive practice growth in 2022: **1.** Personalization; **2.** Digital connection trends... Yes, including telehealth; **3.** Local SEO; **4.** Reputation management (Nearly one in five consumers only consider providers with a minimum of 4.5 stars.); **5.** Monitoring key performance indicators (KPIs). To take your practice growth to the next level, first assess your healthcare marketing strategy and set clear, measurable goals for the coming period. Start by focusing on improvements that reveal performance progress and drive long-term growth. The full report, along with ideas for adjusting your marketing, can be found on PatientPop's site. www.patientpop.com

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HAVE YOU HEARD THE ONE ABOUT

Most workplaces could do with a bit more humor. It not only boosts mood and morale, but also team performance and even the bottom line. Here are a few tips from the worlds of vision, comedy and academia for bringing the funny.

BY CHRIS BURSLEM

STOP US IF you've heard this one, but the list of benefits from fostering an environment of levity in the workplace is staggering: It boosts sales and productivity, makes advertising memorable and leaders appear more competent. It transforms training into something enjoyable, increases employee retention and attracts

eager new hires. It flattens hierarchies, enhances collaboration and encourages people to take positive risks. It lowers stress and helps management communicate difficult messages. It essentially costs nothing (indeed, a 2011 study by researchers at Pennsylvania State University found that a good laugh activates the same regions of the

brain that light up over a fat bonus check). Perhaps best of all, it just makes coming into the store or office more enjoyable for everyone.

So what's the punch line? The rather depressing one that many bosses and workers, especially those in more "professional" settings, think humor is a *bad* idea ... at least at their particular

place of work. And that mindset is growing.

We are increasingly shying away from levity: according to some studies, we spend about a third as much time laughing as people did in the 1930s. Another study found 90% of corporate emails are completely devoid of humor, not even a chirpy sign-off.

HAVE YOU HEARD THE ONE ABOUT...

What could explain this? There are three main reasons, all of which you're probably quite familiar with: humor is viewed as inappropriate for the serious discourse of business or health-care, it's hard to do well (it feels like a divinely bestowed gift — you were either the funny kid in school or you weren't), and it's dangerous. Jokes are about a shared view of the world, an understanding of the same cultural and linguistic touchpoints and, crucially, a willingness to violate the same norms and laugh at the same things. When they bomb, it's ostracizing. Worse, if the quip or story is viewed as offensive, it can damage the teller's professional standing by making him appear lacking in both competence and intelligence.

In short, humor is one more wonder drug that can kill you. It's not unwise to be wary of its power. But that doesn't mean that humor somehow betrays your professionalism. "The research is clear: humor can be one of the most powerful tools we have for accomplishing *serious* things," says behavioral scientist Jennifer Aaker, co-author of *Humor, Seriously: Why Humor Is A Secret Weapon In Business And Life*. "Gravity and levity aren't at odds."

Indeed, there's a good argument that the higher the stakes, the more we need humor. (See: Ukrainian President Volodymyr Zelensky's response to a U.S. offer to evacuate him: "I need ammo, not a ride." The stakes don't get much higher than facing an invading Russian army.) Dr. Adam Ramsey of Socialite Vision in Palm Beach Gardens, FL, puts it into context this way: "Sometimes it's better to laugh than to cry. You can look at a problem and comic relief separates you from the issue so you can approach it rationally like you would if it wasn't happening to you."

But even in these more routine situations — the exam chair or the salesfloor — a little humor can do wonders, easing a patient's anxiety or lowering a customer's defenses.

"When I can hear the opticians and the patients laughing I know it will be a good sales day. Happy patients buy glasses!" says Amie Robinson of Spring Hill Eyecare in Spring Hill, TN. That's not just the confidence of an experienced ECP; it's a truth across industries and professions.

Aaker and her co-author Naomi Bagdonas quote Eric Schmidt, the former Executive Chair of Google, as saying:



"I've learned (often the hard way) that the best way to be taken seriously is to *not* take yourself too seriously."

In your own business, think of the first-time glasses wearer, brand-new presbyope, or a patient that just received a first-time diagnosis of eye disease. They're likely feeling out of their depth and intimidated. A cheerless, all-business ECP is the last thing their overwhelmed mind wants to be dealing with at that moment.

Despite the weight of the occasion, this is often the perfect opportunity for a little irreverence. Mallory Haun at MetroSpecs Optical Shop in Fayetteville, NC, shares, "We utilize humor in our shop every day, from occasional goof ups on our part or to lighten the tension of a new glasses wearer." Pablo E. Mercado at Highland Eye Boutique in Woodstock, GA, who believes that humor used smartly and appropriately is a valuable tool in his toolbox, likes

to tell patients upon finalizing a sale to go to the hardware store and buy a bucket... "So they are able to catch the coolness dripping from their new eyeglasses," he says. "At first they look confused, then they laugh when they get the joke. It also gets them excited about their new glasses. I even had a patient bring a toy bucket for his dispense once. Made my day!"

Disarmed, a customer or patient is then more likely to listen and more likely to be in the mood to buy. Done right, humor has the power to build bridges instantly, lull the customer into surrendering useful personal information and overcome objections. Dr. Scott Mann at Invision in Christiansburg, VA, agrees, "Humor is vital to the human experience so it is great in the office! When I send out a patient for a cataract consult I remind them 'Now, everyone you know is all of a sudden going to become a cataract expert.' After they think about that for second, most laugh and say 'I know, I will ask you if I have any questions.' Humor helps make the point."

"Humor makes you likable and people want to buy from people they like because they trust them and have more confidence in them," says sales trainer Jeffrey Gitomer. "The end of laughter is followed by the height of listening." Or as John LaShorne of Brown County Eye Care in Nashville, IN, states, "People do business with people. Getting the person to like and trust you is essential."

But I'm not that sort of funny, you say. Few of us are. Mercifully, it's not that hard to get better.

Humor is a skill, which means it can be learned. And besides, you don't need to be professional comedian level funny, you just need to be funnier than the dour ECP down the road.

"Just as you don't need to be Phil Mickelson to do well at the company golf outing, you don't need to be Amy Schumer, Ali Wong, or John Mulaney to use

humor well in the workplace,” writes Brad Bitterly and Alison Wood Brooks in *Sarcasm, Self-Deprecation, And Inside Jokes: A User’s Guide To Humor At Work*. Studies even show that something as simple as a light-hearted line at the end of a sales pitch — “My final offer is X and I’ll throw in my pet frog” — can increase customers’ willingness to pay nearly 20% more. “Really let it sink in how bad that joke is. The bar is so low,” says Bagdonas.

For Mark Twain, arguably America’s greatest wit, humor wasn’t some optional extra. It was the key to a good life. “Humor is the great thing,” he wrote. “The saving thing. The human race has only one really effective weapon and that is laughter.”

In the following pages, we provide tips from your fellow ECPs, comedians and academics to help you up your humor game, and your business operations as well.



TELL STORIES

THE SAFEST HUMOR involves personal stories; they’re original and can be perfected in your own style. Keep in mind there’s nothing funny about a confident person who’s doing well. The best stories involve the times life threw you a banana peel. Your new trainee botching a frame repair is not funny today ... but it will be when you talk shop with other ECPs. As the late humorist Jeanne Robertson wrote in *Don’t Let The Funny Stuff Get Away*, humor is not about being able to tell jokes, it’s about accepting things about yourself that can’t be changed. Tip: Crafting a funny story involves knowing the ending and working backward. Keeping the punchline in mind helps you determine which details are essential for your story. If it doesn’t directly set up your punch line, cut it.

Keep It Short

COMEDY IS IN the details but you don’t want to overdo it, says San Francisco comic Reggie Steele: “Just enough to set the scene,” adding your description should be “as if you were talking to a blind person.” William Shakespeare may have written “Brevity is the soul of wit,” but funny guys have known you need to get to the funny fast forever. Writing comedy isn’t really about writing, it’s more about editing,” says Nihill.

Look for True, Not Funny

IF YOU WANT more humor in your life, don’t look for what’s funny, just look for what’s true, says Bagdonas, a lecturer at Stanford Graduate School of Business and coauthor of *Humor, Seriously*. “So become an observer of your life. Look for little oddities or incongruities. It’s not about being funny per se but using humor in small intentional ways.” Jerry Seinfeld, arguably the most successful American comedian of the last few decades, has made a sparkling career from this sort of observational humor: What’s the point of straws? Or one-speed bikes? Why do your

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HAVE YOU HEARD THE ONE ABOUT...

kids have names like stars? His genius is in seeing the funny in the thing in front of your nose. “I *live* for humor. It *is* the basis of my business,” shares Dr. Cynthia Sayers of EyeShop Optical in Lewis Center, OH, “I don’t tell lame eye jokes, I find humor in the world we live in.”

Bagdonas agrees: “Just look around your life and notice these simple true things.” Such an approach also leverages the psychological principle of priming, which states our brains are wired to see what we’ve been set up to expect. Start looking for the humorous and you’ll find it everywhere. In your commute, in your efforts to bring life to heel, in the mirror.

Start Small

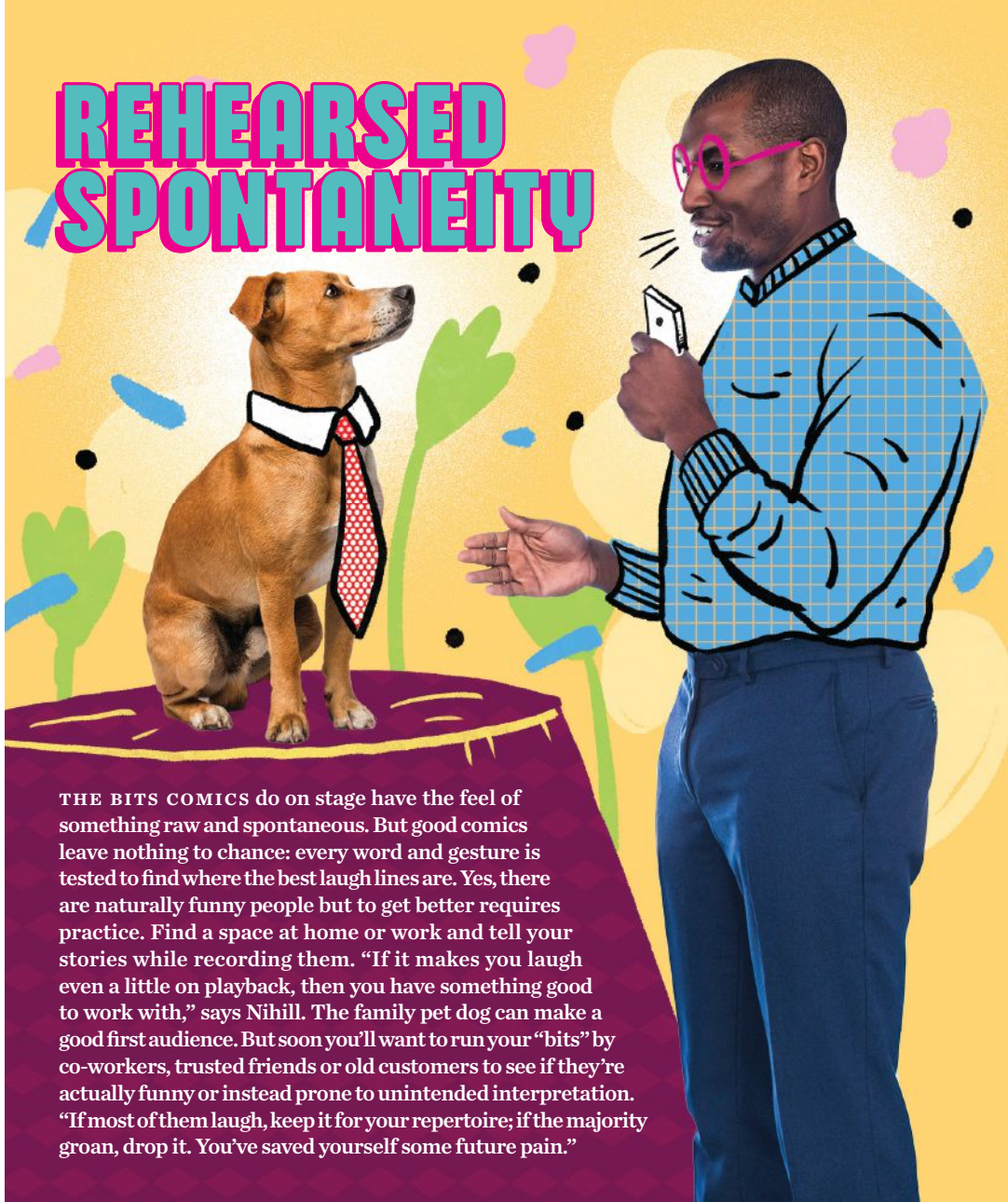
 AS YOU EMBARK on your journey to find and share the funny, take tiny steps — your brain works better and you make better choices when you’re in your comfort zone. You’re also likely to approach customers more positively when it’s in a situation where you’ve had success before, writes Marcus Buckingham in *The One Thing You Should Know*.

Leverage Existing Rituals

 NOT ALL HUMOR needs to be of the high-stakes interpersonal type. It can be inserted in the small existing rituals of a business.

Bagdonas says: “Oftentimes a manager can think, oh gosh, well, I have to do something totally big and bold to have some levity here. And actually, sometimes the more effective way is to say, what are the rituals you already have? Are there team communication channels? Are there all hands or daily standup meetings? And could you add a little bit of humor into those?”

This can include anything from using light-hearted



THE BITS COMICS do on stage have the feel of something raw and spontaneous. But good comics leave nothing to chance: every word and gesture is tested to find where the best laugh lines are. Yes, there are naturally funny people but to get better requires practice. Find a space at home or work and tell your stories while recording them. “If it makes you laugh even a little on playback, then you have something good to work with,” says Nihill. The family pet dog can make a good first audience. But soon you’ll want to run your “bits” by co-workers, trusted friends or old customers to see if they’re actually funny or instead prone to unintended interpretation. “If most of them laugh, keep it for your repertoire; if the majority groan, drop it. You’ve saved yourself some future pain.”

sign-offs in emails to getting staff to play “two truths and a lie” at monthly meetings. *The Wall Street Journal* recently reported about the “corporate jargon

days” that employees at consultancy Silver Lining Ltd. held on a monthly basis when they tried to use as much vague, bureaucratic language as possible. The goal:

KNOW YOUR HUMOR STYLE



Bagdonas and Aaker say everyone has one of four humor styles:

1. **Stand-Up:** Bold, irreverent, and unafraid to ruffle a few feathers (Wanda Sykes).

2. **Sweetheart:** Earnest, understated, they use

humor that lightens the mood (James Corden).

3. **Sniper:** Edgy, sarcastic, nuanced — masters of the dig (Michelle Wolf).

4. **Magnet:** Expressive, charismatic, and easy to make laugh (Jimmy

Fallon). To determine your category, you can take their test at quiz.humorseriously.com.

“The more you understand everyone’s styles, the easier it is to read the room and know when to drop that perfectly timed frog joke,” says Aaker. “You’ll

also be better able to mitigate risks. For example, sweethearts and magnets need to watch out for excessive self-deprecation that can undermine their reputations, while stand-ups and snipers have to make sure they don’t offend or alienate.”

to goad the group to break the buzzword habit. “Before going to lunch, we would joke about having a three-hour strategy session to do a SWAT analysis of Subway vs. McDonald’s, considering how we could all get into alignment and move forward together as a team,” an employee told the paper. After the lesson was absorbed, they dropped the ritual. At Northwest Hills Eye Care in Austin, TX, Dr. Laura Miller shares, they mark meetings with humor. “We do a ‘dad joke’ in our office meetings just to give a good eye roll or get a giggle.”



The Rule of Threes

THREE IS THE smallest number of elements required to create a pattern. Once you start looking for it, you’ll see it everywhere (“Life, liberty and the pursuit of happiness,” “Blood, sweat and tears,” “Sex, drugs and rock ‘n’ roll”). It works in humor when the pattern ends with something unexpected. “It seems that audiences are trained to laugh at the third item as well,” says David Nihill, the author of *Do You Talk Funny*. “It’s strange but true.” Have doubts? Just think of every “Three men walk into a bar...” joke you’ve ever heard.

Keep a Journal

Keep an “A Funny Thing Happened On The Way To Work” file or journal to record humorous things or events so you can recall them. It’s an assignment all Aaker and Bagdonas’ students are given at Stanford. “All that you do is you go through your day, and you jot down any moment when you laughed, or any moment when you had shared laughter,” Aaker says. Typically, students report experiencing much more joy and laughter in their lives by the seventh day of this practice, she says.

COMEDY IS WRITING

Everyone knows that comedy is essentially a combination of what you say and how you say it — your material and your delivery. The often unmentioned third element is how you write it. Explaining his creative process to podcaster Tim Ferriss last year, Seinfeld mentioned dropped phone calls as an example. “It’s so stupid, people saying ‘I don’t know what happened just then,’ I think, let me see if I can create something: it’s like an archery target from 50 yards away, so I take out my bow and say, let’s see if I can hit that. I’ll write something and I’ll go back to it the day after and see if I like it ... I love to spend an inordinate amount of time refining and perfecting it until it has a pleasing flow to my ear. And then I can’t wait to say it publicly. It’s like an experiment, and the audience dumps data on it. And it’s back to the re-write process.”

Context Matters

ANY RULES OF thumb for using humor must include a caveat: Context matters. Conversational dynamics can vary profoundly from person to person, group to group and situation to situation. These factors are tricky to navigate and make it difficult to know whether your humor attempt is being helpful or a distraction. (And when you’re the boss, staff will often laugh politely even if something isn’t funny or is in poor taste, creating an unreliable feedback loop.) A joke can work even in a somber situation if it relieves tension. A boss who jokes after a round of layoffs that he’s going to have to get a smaller yacht is likely to come across as insensitive and tone deaf, says Andrew Tarvin, a New York City workplace coach and author of *humor that works*. “Before you try



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HAVE YOU HEARD THE ONE ABOUT...


to say something humorous try to determine the type of person you're addressing — the wrong humor will sink you as fast as the right humor will boost your chances of a sale," says Tarvin. Learn to read the nuances of co-workers' and customers' moods and attitudes and pick the right context for jokes, he says in his book *How To Fail At Almost Everything And Still Win Big*. Be like Chris Gregg at Inver Grove Heights Family Eye Clinic in Inver Grove Heights, MI, and ABT — Always Be Testing. "Every time I talk to a patient, I test the waters each time to see if they have a sense of humor."

Humor for Negative Feedback


 IT CAN BE tempting to fall back on a joke to lighten the mood or stop someone from getting overly defensive — such as teasing someone about running up a \$75 tab on the hotel minibar at a trade show. However,

couching criticism in the form of a joke can lessen its impact. A Harvard Business School study found that although humorous complaints were better received than serious ones, they were also seen as more benign, and people felt less compelled to take action to rectify the problem. "If a manager jokes about a subordinate's slipping performance, the employee may think either that his performance hasn't been slipping or that the situation isn't a big deal. If it were, why would she be joking about it?" Brad Bitterly and Alison Wood Brooks write in the article.

Make Fun of People Correctly

 IN OTHER WORDS, make fun of what people do, not who they are. If you're on the fence about whether to say a joke, don't use Louis CK as your guide, says Bagdonas. "Don't ask yourself, will this make me sound funny? Instead ask, how will this make other people feel? The goal isn't to get a laugh, it's to connect, to make people feel lighter and more at ease." Most people know the taboos: Divisive racist, ethnic or sexist jokes are out. Not only do you risk losing the sale but you could damage the reputation of your business (and find yourself on the wrong end of a lawsuit). But you need to go further than simply watching out for someone's background or identity. "Don't punch down. So that means never making fun of someone of lower status," says Aaker. Finally, check your distance — how close are you to the person you are making fun of? "I can make fun of my mother but not your mother," says Aaker.

Bounce Back

 THE FIRST RULE when a joke bombs is don't double down, don't repeat the joke, thinking people must not have heard it. They most likely did. And don't explain it. Instead, skilled humorists quickly turn the joke on themselves, says Michael Kerr, a workplace trainer and author of *The Humor Advantage*, adding that you should make sure to deliver it in a warm, non-sarcastic tone. For example: "It takes a special human being to do what I just did," or "This is great. Today was going too well anyway," or "Thanks, I'll be here all day." "Make them laugh with you or at you!" says Alexander Saper of Great Glasses in Houston, TX.

As for those times when you cross the line and say something inappropriate, "that's a very differ-


AND, YES, TRY IMPROV

SPEAKING AND presentation coach Darren LaCroix says there are three keys to improving humor delivery — stage time, stage time, and stage time. Humor workshops for businesspeople, and especially improv clubs, have exploded in recent years, and while yes, improv is little more than looking silly and exposed in front of strangers, the benefits are claimed to go way beyond getting more comfortable with public speaking. (One MIT study found a group of improv comedians generated 20% more ideas than professional product designers did — apparently practicing improv develops your ability to create). On top of a tougher skin, improv teaches specific techniques to think faster and funnier on your feet, the best known of which is the "and, yes" extension to allow you to further riff on an idea. It even makes for a great team building exercise...




ent scenario,” says Bagdonas. “The most important thing is genuinely acknowledge it and get curious about your blind spot. Where was the empathy-fail that led you to this humor fail? So that you can learn from it and not make the same mistake in the future.”

Practice with Bottles

 COMEDIAN MATT MORALES recommends practicing your presentation or pitch with a bottle in each hand to get accustomed to speaking with your hands out in front of you. It looks natural but initially will make you feel like Jon the Robot.


Use Humor That Has a Point

 OUR BRAINS DON'T like or recall boring things, which is why funny ads are remembered. However, there are two things to keep in mind when going for a humorous approach in your advertising: 1) studies show your claims may not be taken as seriously; and 2) the humor needs to reinforce the principal point of your ad. “Here’s the litmus test,” says *Wizard Of Ads* author Roy H. Williams: “If remembering the humor forces you to recall the message of the ad, the humor is




motivated. Good job. But if recalling the humor doesn't put you in memory of the ad's main point, the humor is unmotivated and will make your ad less effective. Sure, people will like the ad. They just won't buy what you're selling.”

Is Sarcasm Your Second Language?

 SARCASM HAS A reputation for being a low, mostly negative form of humor favored by teens when engaging with their parents or humiliating a peer. But studies show that when used appropriately it can boost creativity and expand the way we think about things; because it involves saying one thing and meaning another, interpreting it necessitates abstract thinking. But it requires a cautious approach

and works best when trust and playfulness have been established, otherwise a wrongly-placed sarcastic comment can appear flippant or cruel, according to Professor Adam Galinsky of Columbia Business School. “Until you've established trust, it's best to communicate with respect,” he writes in the *Harvard Business Review*.

Be Inclusive

 INSIDE JOKES CAN signal closeness or camaraderie, making people feel pleased to be in the loop. But they can also draw fault lines in an organization, making some people feel awkward and excluded. The research on this kind of humor is clear: When group cohesion is important, tell jokes that everyone can understand.

IT'S OK TO CHICKEN OUT

If you don't think you can land jokes at work, or you're too nervous to try, that's OK. Not everyone is meant to be funny, just as not every attempt at

humor will be successful. (Even professional comedians have “bits” that bomb.)

But you can still incorporate a little levity into your work life by doing something simple: appreciating other

people's humor, say Bitterly and Wood Brooks. “Be quick to laugh and smile. Delight in the absurdity of life and in the jokes you hear. A life devoid of humor is not only less joyful — it's also less productive and less

creative, for you and for those around you.” Dr. Robert M. Easton Jr. in Oakland Park, FL, sums this up perfectly: “I rarely tell a joke but I welcome patients telling them to me.”



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KNOWLEDGE = PROFIT

11 DATAPPOINTS you need to be collecting from your healthcare consumers.

BY HEATH BURSLEM



As a business owner or manager, you have access to a wealth of information on your customers, from their hobbies and occupations to which social media posts they respond to most.

This intel can be used to enhance the customer experience and yield financial gains — provided you're collecting the right data. We consulted our ECPs on the customer information they collect (and how they use it) and checked in with some experts to put together a list of 11 types of data you need to be mining.

Email Addresses

→ According to marketing company Data Axle, nearly half of all retailers fail to collect email addresses at time of sale. As they put it, it's "much easier to maintain a customer relationship than to foster a new one," and email is the perfect tool for this, whether through email blasts ahead of sales, regular newsletters or customer surveys. Dr. Laura Miller at Northwest Hills Eye Care in Austin, TX, says, "Our most valuable data is email addresses. We use this to send out monthly newsletters, quick updates about products or specials." And Carissa Dunphy at Monroe Vision Clinic in Monroe, WA, adds, "We send out bulk emails when having a promo and the click/capture rate is always great."

Phone Numbers

→ Like email addresses, this is low-hanging fruit — but that doesn't mean it isn't super valuable. MonsterInsights co-founder

Chris Christoff told *smallbiz-trends.com*: "I suggest asking for this information after someone has already subscribed to your email list. These are the people who are most likely to subscribe for text notifications." Optician K. Elizabeth Bouravnev at Bergh White Opticians in Springfield, IL, says, "Our best engagement is text and telephone."

Preferred Mode of Communication

→ Don't assume all your customers want to stay in touch by email; ask how they like to be contacted. Providing options creates an eager-to-please impression and keeps you from losing touch with those who are inclined to ignore non-work or personal emails. "The more we know the more we can serve our patients. We ask about communication preference so we are respectful of how the patients want to be contacted," says Melanie Jenkins, office manager at Spring Hill Eyecare in Spring Hill, TN.

→ CONTINUED ON PAGE 52

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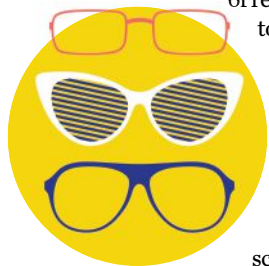
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→ FROM PAGE 50

Vision Use

→ Knowing exactly how a patient uses their vision can maximize the value of their visit, allowing your team to make a full range



of recommendations to ensure optimal patient care and optimized sales. “We find out what activities they use their eyes for such as reading, work, school, hunting, computer...etc. This

helps the doctor recommend [various] glasses and helps the opticians sell multiple pairs,” says Caitlin Wicka at San Juan Eye Center in Montrose, CO.

Lifestyle Details

→ Personal details beyond screen time and occupation are rich with potential. Asking about hobbies might lead to a chat about polarized lenses for a fishing enthusiast. And “data” isn’t limited to replies to questions: Keep your antennae up. “I stay up to date on sports, which is important when the patient is wearing a team hat,” says Dr. Texas Smith at Dr. Texas L. Smith & Associates in Citrus Heights, CA. “I have patients that have a Super Bowl Ring, World Series Ring and a Bassmaster Classic Ring. I have their pictures in the office which easily starts a conversation if my patient is interested in baseball or bass fishing.”

Demographics

→ Optometric practices have a marketing head start in terms of information gathered with health records. At Urban Eye Care in Phoenix, AZ, demographics are tracked via EHR, and used to target email marketing based on patients’ characteristics. Using EHR for such activities is subject to legal restrictions, though. Depending on your jurisdiction,

you may need written permission before using it for marketing purposes; get legal advice first.

Sales Patterns

→ All businesses keep sales records; not all make full use of it. “If you track it, you can increase it,” says Jenna Gilbertson at McCulley Optix in Fargo, ND. “In 2020, we made it a goal to sell five annual supplies of contact lenses per month. Staff would make a \$50 monthly bonus if that goal was met. It was in line with what we had done in years before. However, by tracking it and talking about it, our staff became invested in selling annual supplies. We sold three times as many annual supplies in 2020 than we did in 2019!”

Online Engagement

→ Dr. Scott Mann at INVISION in Christiansburg, VA, has this one down pat. “We look closely at reviews, then I track website hits, which pages, page load speed (part of the experience) and social media engagement. Google analytics, SEO & key words [are tracked]. Some are graphed and hang on my office wall, others in PC dashboards and some in Excel spreadsheets. I visualize these, and many more, metrics — like a gas gauge or speedometer in a car — and would not want to drive my business without them!” (Tip: Don’t forget to monitor newsletter opens and conversions, too...)

‘How Did You Hear About Us?’

→ Learning how your customers discovered you lets you pinpoint which marketing tools are giving you the best returns. Tracking referrals also gives you a chance to thank those who send business your way. The question “How did you hear about us?” is a key intelligence gathering tool says Gilbertson at McCulley Optix Gallery. “When you pull the report and see

all the newbies say ‘Google’ you invest time and money into redoing your website, asking for more Google reviews and increasing your online presence. Meet them where they are!” At Pend Oreille Vision Care in Sandpoint, ID, “How’d you find our office?” is on every check-in form. “Not that the results are particularly surprising; they simply confirm that street frontage and word-of-mouth truly are worth 1,000,000 paid ads,” says Jen Heller.

Pain Points

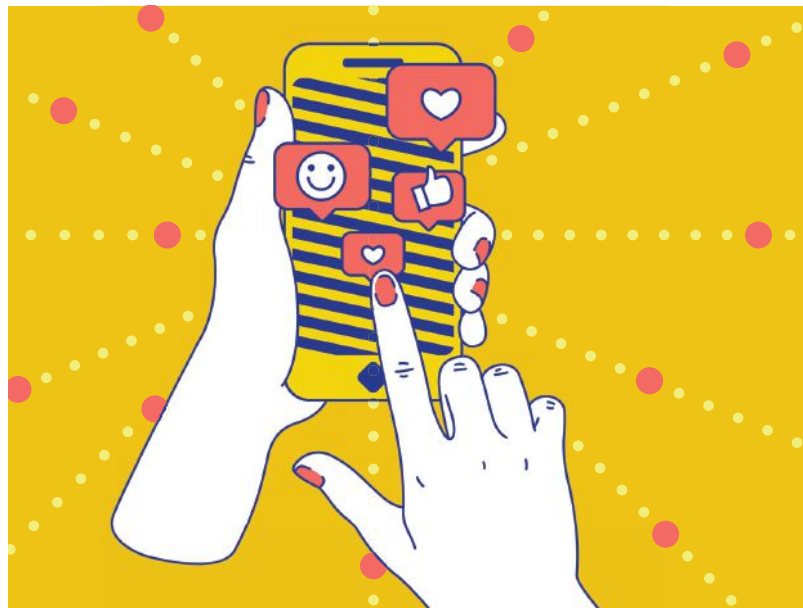
→ If you could find out which parts of the purchasing process caused your customers the most grief, and offered them solutions, you’d have a leg up on your competition. (Think Warby Parker.) You may not be looking to cater to that particular audience, but you can find out what would make life easier for your patients by sending them a feedback survey and asking them about what kinds of information they lack, affordability, how the process of purchasing eyewear could be improved, etc. Take the guesswork out of improving your customer service.

Product and Service Feedback

→ At St. Peter and Belle Plaine Eyecare Centers in Saint Peter, MN, “When a patient is seen by the doctor they are instructed if anything goes wrong in their care or if they do not like a product, we want to know. This has made our patient base very open to sharing issues, both positive and negative, as well as things they would love to see our office do. We try to meet these demands,” says Dr. Zachary Dirks.

...And More

→ Certain types of data can require more sophisticated analysis to make the most of, and there are a number of business intelligence products to help with this, such as OpticalCRM and EdgePro, as well as consultants such as marketing4ECPs. These can help you track and use customer engagement data, geolocation, RFM (recency, frequency and monetary value — basically, how recently a person bought from you, how often a user buys, and how large their purchases are) and more.





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INTELLIGENCE

Gut Check

Making decisions based on gut feelings has a patchy record but there is a growing body of evidence that we don't make our best choices when we rely on our supposed rational minds alone. Instead, there is much to be gained from listening to the environmental cues our bodies are picking up and which, as modern beings, we are often taught to disregard. In her book *The Extended Mind*, Annie Murphy Paul recommends keeping an "interoceptive journal" to note how your body felt when making a decision and to ultimately identify the patterns. She cites studies of Wall Street traders who seem to make more money when they're more interoceptively attuned; that is, when they're better at reading their own body signals. For much more on this fascinating and potentially very useful topic, catch Paul's interview with *The New York Times*' Ezra Klein at invisionmag.com/042201.



SANITY FILES: p. 82

REAL DEAL: The Case of the Low-Income Disparity p. 74



FUNNY A-HAS! Steve Vargo, OD, on Patient Communication p. 60

DO YOU OR DON'T YOU

Do you or don't you offer paid time off?

PAGE 72

85% YES

15% NO

ONE QUICK QUESTION

HOW DO YOU LEARN BEST?

14%

By reading

65%

By doing

5%

By watching

16%

By being taught by someone





TIP SHEET



Some jobs, such as managing a store or medical practice, are prone to interruptions, which can play havoc on achieving your goals for the day. In *18 Minutes: Find Your Focus, Master Distraction, And Get The Right Things Done*, Peter Bregman recommends the following: Set your phone to beep every hour. When it does, do two things: Take a deep breath, then ask yourself, “Am I doing what I need to be doing right now?” If you’re with a customer, ignore it. If you’re doing something constructive, you’ll feel good. If you’d intended to spend five minutes looking for a new umbrella online but have fallen down a 1970s TV trivia hole it will pull you out and get you back on track.

MANAGEMENT
FORCE A REAL DECISION
The next time you ask an employee or partner for their opinion on a business-related matter — say to rate a job candidate, a new line, or a business proposition — ask them for a score between 1-10 but tell them they can’t choose seven. Seven is a fudge, says speaker and author Kyle Maynard. Force the person to choose between at least an eight — they’re genuinely excited by the prospect — or a six ... which usually indicates they’d pass on it.

MANAGEMENT
FILTER FOR IMMEDIACY
Life is an exercise in prioritization, but it can be hard to remember that when it comes to some vague unfilled time slot weeks away. “When you get an invitation to do something in the future, ask yourself: would you accept this if it was scheduled for tomorrow? Not too many promises will pass that immediacy filter,” notes *WIRED*’s Kevin Kelly on his blog.

COMMUNICATION
SCHEDULE EMAILS
It can feel good to crush some work on the weekend but as a biz owner, remember that your staff aren’t thinking about work 24/7, especially on the weekends. (They’ll actually be better workers if they can effectively switch off for a time every week.) In line with this, use “Schedule Send” to ensure your email arrives during business hours, no matter when you send it, says Tim Harford, writing in his *The Undercover Economist* in *The Financial Times*.



WELLNESS
ENJOY THE COOKIE
If you’re going to reward yourself for your hard work with something less than healthy, say a cookie or a free roam through social media, at least enjoy it, Karden Rabin, a wellness expert, tells Adobe’s online creativity resource *99U*. “If you’re thinking, I want to be nice to myself and have a cookie, you’re going to miss the pleasure principle of eating that cookie if you’re on your phone and distracting yourself at the same time.” Savor the moment, she says.

MARKETING
REWARD SHOUT-OUTS
Online reviews drive sales. If a staffer’s name is popping up in reviews, more people will come in and ask for that person. To encourage such excellent service, the employees at Wag Nation, an independent pet store in Newport, RI, are generously rewarded each time they are positively reviewed with a bonus that could be anything from store credit to cash to help with their car payment.

MANAGEMENT
OUT WITH THE OLD
In his new book *Mind Of The Market*, Michael Shermer warns against three “old brain” biases: 1. We’re wired to cooperate, but we also act irrationally as though others have our best interest in mind; 2. We’re always comparing ourselves to others. Remember, if the optical over the road had a huge holiday season and you had a good one, you’ve still had a good one, no matter how the profits match up; 3. Beware the endowment effect: People tend to overvalue what they already own. Be objective when evaluating your inventory.

Contributors’ Bios

KAYLA ASHLEE is the co-founder of Spexy, an international optometric speaker, a certified optician, and an optometric renegade. Her direct and relatable approach to training has set her apart in the industry. To learn more visit www.bespexy.com.

JOHN D. MARVIN has more than 30 years of experience in the ophthalmic and optometric practice industry. He is president of Texas State Optical and writes about marketing, management and education at the practiceprinciples.net blog. Email him at jdmarvin@tso.com.

CASSANDRA STEWART is a copywriter for Marketing4ECPs, where she produces engaging and informative digital content for eye-care practices all over North America. Outside of work, Cassandra enjoys spending time outdoors and exploring Calgary’s food scene. Cassandra can be reached at www.marketing4ecps.com.

STEVE VARGO, OD, MBA, is a published author and speaker with 15 years of clinical experience, who now serves as IDOC’s Optometric Practice Management Consultant. Since transitioning to a full-time practice management consultant, Dr. Vargo has performed over 3,000 consultations and coaching sessions with hundreds of independent optometry practices across the country. He has also authored four books on the subjects of staff management, leadership, selling and having greater influence as a physician. Email him at svargo@idoc.net.

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SHEDDING LIGHT

This Illinois eye doc decided it wasn't enough to do eye screenings for diabetes, and set about educating his community on this leading cause of adult blindness. *BY HEATH BURSLEM*

Diabetes is the leading cause of adult blindness and serious vision impairment in the U.S. In most cases, retinal health issues have the potential to be treated and improved through supplementation and addressing lifestyle. For this to happen, the public needs to be educated about diabetes. One ECP who has taken up this challenge is Dr. Ansel T. Johnson, owner of Vision Salon Eye Care Associates in Blue Island, IL.

THE IDEA

According to Johnson, whether they realize it or not, close to 50% of the population are either living with diabetes or are borderline. Knowing this, he's not content to limit his diabetes eyecare to the detection of retinal

issues and sending patients off for injections. It's also a personal issue for Johnson: "I myself have walked the path of being borderline diabetic and then Type 2 diabetic because I didn't take it seriously. It touches most families in some way in communities of color and I wanted to make a difference in people's lives, above doing diabetic eye exams."

As an OD specializing in diabetic eyecare, Johnson has been a member of the Association of Diabetes Care and Education Specialists (ADCES) for over 20 years. It was from them that he learned that 56% of patients diagnosed with diabetes have not seen a diabetes educator. Eager to help put things right, he decided to take matters into his own hands. "I wanted to make a bigger difference in patients' lives."

THE EXECUTION

Johnson devised a patented education program titled "KNOC Out Diabetes." (KNOC stands for Knowledge Nutrition Ocular Health and Coaching.)



Nationally certified by ADCES, it is designed to help patients "live their best lives living with diabetes," he says. "This helps give more wraparound care that complements the eyecare we give to patients living with diabetes."

The program of diabetes self-management education involves one-on-one or group sessions with Vision Salon's diabetes educator. Sessions last from one to two hours, with a course lasting up to 10. "We start with an assessment of the patient's needs and goals and make a patient-centered plan. We make sure their primary care and/or endocrinologist treatment plans are supported and complemented," says Johnson.

The program is a component of Vision Salon's overall diabetic eyecare specialty, in which Johnson uses advanced diagnostic testing like OCT angiography, Full Field ERG and other technologies to detect not only problems but also early changes that can be stabilized or even reversed. The practice also offers supplements and conducts healthy shopping

tours at a local grocery store, not to mention line dancing classes, chair exercise sessions and healthy cooking classes to make lifestyle changes fun and achievable.

Vision Salon is also involved in outreaches and partnerships with local not-for-profits in battling healthcare disparities in communities of color. According to

Johnson, these disparities are found not only in diabetes treatment, but also in many other areas including home health for seniors, hypertension, low vision, organ donations and access to practitioners.

THE REWARDS

For Johnson, the chief reward of getting involved in educating the public about diabetes is simple: "Making life-changing differences in our patients," who, he says, go from "spiraling out of control to huge improvements in quality of life." He adds, "Most of our participants are success stories."

Are we doing enough as a society to educate people about diabetes? No, says Johnson, because the numbers are worsening. But to him, that just brings ECPs' responsibility into sharper focus: "Optometry is in a prime position to make a difference."

DO IT YOURSELF

BOOST YOUR DIABETES EDUCATION AND OFFERINGS

→ **SIGN UP.** Join the Association of Diabetes Care and Education Specialists.

→ **HIT THE BOOKS.** Take courses from ADCES.

→ **GET THE GEAR.** Invest in technology for managing patients with diabetes.

→ **STUDY UP.** Learn about nutrient supplementation and diabetes.

→ **GO TO THE SOURCE.** Hire 'KNOC Out Diabetes' practice consultants to guide program development for your office.



Dr. Ansel T. Johnson with a 'KNOC Out Diabetes' graduating class at Vision Salon Eye Care Associates.



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FUNNY A-HA!

If it isn't working, switch it up.

Steve Vargo, OD, on Patient Communication



Sometimes an “a-ha” moment presents in unlikely places. I’ve always been interested in a topic that I don’t feel gets enough attention in optometry school – patient communication. Doctors are taught to thoroughly educate the patient, but as many ODs will attest, sharing information with patients doesn’t always lead to improved outcomes. Sometimes a patient politely nods their head but ultimately ignores your professional recommendation. Sharing education only guarantees you’re giving patients the information; effective communication increases the chances people will do what you recommend.

So, back to that “a-ha” moment... I met late night comedian Seth Meyers once. Well, not really. I got to watch him practice the monologue for that night’s show, and I think he looked directly at me once. Does that count?

My wife and I were visiting NBC Studios in New York when someone handed us a pair of tickets to watch Seth Meyers rehearse and refine that night’s monologue. Before choosing about 12 jokes, they present roughly 100 in rapid

succession to a live audience and monitor the reactions and laughter. It sounded interesting, so we went.

At the start, Seth told the audience, “You’d think by now we’d know what was funny, but we don’t.” While he was telling the jokes, his team of writers was in the corner observing and furiously scribbling notes.

Some jokes were hilarious, others completely bombed. Crickets. But it didn’t faze him. They were just collecting data. When he finished the last joke, the writers quickly exited the studio to compare notes and finalize that night’s monologue.

I kept thinking about the writers not knowing what kind of reaction each joke would get until they tried it. From my own experience with public speaking, I can relate as I’ve occasionally worked a joke into a presentation that sounded hilarious in my head but fell flat with the audience. That’s a lonely feeling by the way; I can understand why they do a trial run before going live.

This got me thinking that a similar approach could be applied in the exam room when communicating with patients. Try asking new questions or reframing current questions. Present a solution in a different way. Try different ways of educating patients. You can even



try your hand at humor if you’re funny. Patients like doctors with a good sense of humor.

Then, monitor the results. Do patients seem more interested in what you’re saying? Does it enhance their understanding of something? Do you feel a greater connection with the patient? Does this lead to more patients purchasing glasses or a service you offer and recommend?

Spending time educating patients is only effective if it gets a positive reaction from the patient. Seth needed the laughs. Doctors need things like compliance, behavior change and motivation to invest in better vision.

Do your own research. When you find something that works, keep doing it. If it isn’t working, switch it up. It seems to work for comedians. Maybe it will work for doctors too?

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BECOMING AN EXPERT

curated by Carissa Dunphy @OpticianNow

ECs share the hows and whys of gaining expertise at their craft.

What is your advice for someone working their way to becoming an optician?

► This is a field where the successful are driven by a desire to help people. If you have a passion for improving others’ lives, then it’s a perfect place for you and the industry will be richer with you in it. **RIC PERALTA, BS, ABOC**

► Don’t ever give up! Making a lot of mistakes can be discouraging but keep your head up and keep going! Learn from every mistake and strive to be better next time. **JESSICA CURNEW, ABOC**

► Be patient. There is so much to learn, from the medical aspect, lens options, prescriptions, troubleshooting, adjustments, insurance. I remember wishing I could just be an expert immediately ... but that is what makes it so fun, all of the variety and different tasks we can learn. So be patient with yourself and enjoy the challenge. **KYLA SKINNER, ABOC**

► Opticianry is one of the most rewarding and fulfilling careers someone can pursue today.

There are few other professions which provide the same level of opportunity with as low of a barrier to entry. Most individuals have access to becoming a professional in a short period of time, and for the most part, can pursue a career while working and earning a living. **SHAWN LESSARD, BSC. LICENSED OPTICIAN**

► Learn the theory behind why you are doing what you are doing. This knowledge translates to expert patient care. Also

realize that adjusting eyewear is as much an art as it is a science. Real world exposure and experience are the only ways to master this craft. **SAM WINNEGRAD, MBA, NCLE-AC**

► Work with an optician who was trained in lab work and the older traits of the craft. **MARK CLARK MBA, ABOC**

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VAPORIZED

DURING OUR REOPENING, we had a lot of new restrictions. Wearing a mask is one that we still have in place in our ophthalmology practice. Back in June 2020, at the height of the COVID restrictions and protocols, we had one patient that just kept pulling her mask off. After the third time, I told her “If I have to ask you again to wear a mask, I’ll be asking you to leave.” I walked away for a few minutes to send a fax to another office and came back to her with the mask down *smoking her vape!* I kindly asked her to leave and not come back until she was able to not vape and wear a mask for the duration of her visit. She, of course, went to Google and gave us a scathing review. Thanks Karen!
Justin Tenczar, Berkshire Eye Center, Pittsfield, MA

SHORT CUTS
 ECPs tell how they save time in their hectic schedules

INSURANCE, COVERED!

AT OUR OFFICE we write up a quote for each patient purchasing glasses so they see what insurance covers and there is no surprise when we give them the total. We see a lot of the same plans over and over, so we made cheat sheets for some of the most common plans. It makes it simpler to fill in our quote sheets.
Ann-Marie Weaver, Optimal Eye Care, Lewis Center, OH

REFINE YOUR PITCHES

Because finding your groove inevitably puts you in a rut.

Kayla Ashlee
 on Sales



About five years ago, Vision Expo West shared the same hallway with a dental conference at the Venetian. One of my buddies, who is a dentist, told me the keynote speaker for their conference was my favorite actor, brilliant speaker, and total dreamboat... Will Smith. My buddy, being a great friend and fellow rule-breaker, snuck me into the keynote speech. It was amazing! The theme of his magical talk was how skill is developed by hours and years of continually refining your craft. He shared his habit of constant adaptation by telling stories of his personal life. I left completely enlightened and reflected upon the small adaptation opportunities I may have been missing in my personal and professional life.

The days following, while visiting with colleagues at VEW, I noticed a very evident stagnation. Through trial and error most optical professionals find a groove when communicating with our patients. We spend hours and years refining our craft, but at some point, we unintentionally plateau. When we are not continually refining our approach that groove becomes a rut. When was the last time you thought about adapting the messaging to your patients? Could your sales pitch be modernized?

Reflect on your verbiage. Write down each pitch you use for lenses, materials, treatments, and lens upgrades. Then see if you can reframe and modernize what you are saying using these three concepts:

1. RELATABILITY: Today’s consumer wants real. You have heard it before ... drop the jargon! It does not make you look smart; it makes you unrelatable. Your patient does not like to ask, “What’s

that?” after every recommendation. Often, they won’t ask at all. Also, consider adding relatable references. For example, many use the depiction of reducing glare on the water to see fish when discussing polarization, yet most don’t fish. How can you rework each pitch to make it more universally relatable?

2. VANITY: The most underutilized tool when selling eyewear! Everyone wants to look their best. It’s simple; when you feel you look good your confidence increases. In a society that is finally embracing the beauty of uniqueness, the messaging to the consumer needs to adapt. If a product will help a patient stand out, say it!



3. VALUE: Today’s consumer will pay for value. The word “value” is often mistaken for discount, but in this context it’s something deserving of its worth. Value in eyewear is often found in the craftsmanship, the durability, or the experience the patient can expect from the products you are endorsing. Drive home your message by appealing to the item’s practicality. I have created examples in reworking your lingo in this month’s *Behind The Article* video. Simply follow the QR Code.

Learning your craft is necessary to be effective. Continually refining that craft is necessary to be great. To some, adapting your daily verbiage will seem too simple to matter. However, it is the small adaptations that make massive differences. Small changes give you a chance to form lasting habits. If you ever get the chance to ask Will, I’m pretty sure he’d agree.

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ASK INVISION

Should I start a TikTok channel?

▶ TikTok is fun and seemingly everywhere. But that doesn't mean it will be a great fit for you. Jane Harrell, president of Cause Digital Marketing, says that when her clients ask her about adding a new social media channel she tells them it may have potential "but if you don't know how that specific tactic will fuel your business goals ... no, you shouldn't. ... It's way harder to know how to budget [for social media], which channels to choose, how much time to spend and how to tell whether it's working. After all, if you run an ad and get no sales, it's easy not to do it again; but if you have a social media following and are struggling to get sales, it's not necessarily that easy to pinpoint the issue," she says.

Harrell advises that you assess the channel carefully and with a sober mind. "Make sure you can draw a straight line from what you're trying to achieve (get more awareness, build trust, get sales, etc.) to which content marketing channel works best for that. For example, TikTok can be FAB for getting you wide exposure and reaching a younger audience, but it isn't as great for driving local product sales now," she says.

I have been getting many local high schools coming by for ads for yearbooks, band club books, etc. Is this a waste of my money?

▶ Yes, it is ... most of the time. Of course, there can be exceptions. According to Ellen Fruchtmann of Fruchtmann Marketing, "Local high school sports teams, band clubs, and yearbook ads can take a chunk out of what is normally a very tight advertising budget." If you want to participate anyway, Fruchtmann recommends setting up a budget for these types of "donations" at the beginning of the year. "These ads are primarily for goodwill rather than good marketing," she says. Fruchtmann adds that you should consider advertising only in those high school publications that cover the region where your primary customer base lives.

Furthermore, she states that the price could be worth it if the solicitor is the child of a good customer. In that case, "the cost of the \$50 ad is well worth the benefit of future sales." But don't rush your decision.

If you do decide to run an ad in any of these publications, try something clever. It's bad enough that it's not money very well spent. "You might as well attempt to get someone's attention."

→ CONTINUED ON PAGE 66

HIT THE LIST

Patients' email addresses are the cheapest, best ROI marketing tool available.

Cass Stewart on Marketing



Email is one of the most effective marketing tactics you can utilize to grow your eyecare business.

In fact, email generates \$42 for every \$1 spent, which is an astounding 4,200% ROI, according to Hubspot.com.

Why? Well, email marketing is a bit different than other marketing channels. First, you're talking to your current patient base, so people who already know and love you. Second, they trust their eyecare provider so open rates from health professionals like an OD tend to be higher than other email marketing initiatives. This means that you already have their interest and now their attention.

Knowing this, you can use your email list to build loyalty, build trust, and communicate regularly to get more patients back through your doors more often.

But how do you plan your email marketing strategy? If you're interested in expanding your email list for your practice, here are five tips to get you started.

Ask every patient for their email. Let them know you will be sending appointment reminders as well as valuable promotions and information about anything new happening at the practice. Assure them they can unsubscribe at any time.

Create valuable content. People who sign up to receive emails do so for a reason. They're interested in your business, their eye health and want to learn more. Now, it's important that your emails offer engaging content that keeps them on your list and gets them to visit your practice.

Test out different strategies and track which ones work the best. Finding the right content can take some time but if you make the effort to get to know your audience, the better your chance of providing content they want to subscribe to.

Almost all patients love promotions!

Take advantage of your website. Your website is a great asset for building your email list, but a patient should not have to hunt around your website to find the subscribe button. You can make it easy for people visiting your site by making the subscribe button easily visible. Or have a blog feature they can subscribe to which acts similar to an email message.

You can also use pop-ups, feedback opportunities, quizzes and incentives to get people to provide you with their email. Lead magnets like an e-book on "What Causes Dry Eyes?" can work well to gain email addresses of potential patients.

Build beautiful emails. Gone are the days of the basic text email.

With email platforms like Mail Chimp, Constant Contact or industry channels like Weave or SolutionReach, the ability to send out beautiful visual emails with CTA (call to action) buttons to book appointments are easier than ever. Recruit a graphic designer to help you build an amazing email, or email template, that encourages user action.

Be consistent. Almost every eyecare business we talk to does not take advantage of email marketing. Yet it is one of the most economical, highest return on investment advertising options you can invest in.

Optical chains and mass merchandisers email every week. Your patients are getting messages from all of your competitors but not from you. With more and more competitors entering the market space it will become exceptionally important to communicate regularly with your patient base. Hit that list at least once a month!

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→ FROM PAGE 64

I was looking for fresh ideas to move aged inventory. How can I do this apart from a sale?

▶ If you have inventory that hasn't moved in 12 months or more despite your best efforts to put it in front of as many people as possible, then you're going to have to accept the market's verdict: It doesn't think it's worth the price. That makes some sort of price cut inevitable. But there's still room to show your imagination. Here are three slightly different ideas, from sales pro John Nicolosi:

1. Hold online auctions starting at maybe 20 percent above cost (or any starting price low enough to gain customer attention).
2. Review old customer wish lists (or any notes you've kept) to see if

they might like an older piece — if it's a year or older, offer a discount on the item.

3. Post images of your product to others in industry forums that may be doing well in that category. "Every store has a different audience and you may have something that may be someone else's treasure," says Nicolosi.

I've been looking for a sales associate for months but just can't land a good candidate. Should I ease up on my "Never compromise when it comes to hiring" rule?

▶ When a lack of staff is hurting the service you provide customers or costing you money, then yes it's probably time to reconsider. Keep in mind

there is always more than one way to get things done, says consultant Andrea Hill of Hill Management Group. "It takes time to train an effective salesperson. But it takes very little time to train someone to help set up the store properly in the morning, write beautiful thank-you notes, and cover a variety of administrative tasks that salespeople (and you) do." If you need to hire in a pinch, hire someone who can take the less-skilled tasks off your salespeople."



My brother recently assumed leadership of our family business. But I, and my sister, don't feel he pulls his weight. What should we do?

▶ Call a meeting with your sister and brother and try the DESC conflict-resolution method:

- Describe: Outline the problem. Avoid using judgmental language.
- Express: Let him know your concerns if things don't change.
- Specify: Tell your brother what you'd like him to do. Be specific.
- Consequences: Cite the consequences that will occur when the behavior is changed — a better-run business, more profit for everyone. Remember to listen and avoid the question of who's right and wrong.

BUILD TEAM LOYALTY

5 ways to hire and retain good employees.



John D. Marvin
on Management

"There are many ways to motivate people to do things, but loyalty comes from the ability to inspire people." - Simon Sinek

Spend any time at all talking to ODs who own their own practice or opticians who own their own shop and you will hear their frustrations about hiring staff. For some reason, two years of a global pandemic has made it more difficult to find people to hire. You combine that with the long-time problem of high turnover of staff in optometry practices and you have a mess. How do you build loyalty? Here are five ways:

1. Hire to a culture. People accept a job for a lot of reasons. They are looking for more money, a job closer to home, certain hours. They stay at a job for one reason: they like the culture of the place. A friend of mine once said, "People will do for love what they will never do for money."

2. Keep your culture consistent. When owners expect something from their employees that they do not practice, employees will not be loyal. If you expect employees to be on time, then you need to be on time. If you are constantly running behind when seeing patients, you are letting people know that being late is acceptable. Don't get upset when they show up 10 or 15 minutes late.

3. Set the values of the practice. Sit down with your office manager and key employees and let them know what you consider to be the values of the practice and why they are important. This will require you to take time and determine

what those values should be. Every business operation has and demonstrates values, usually without thought or intention. It is important to your employees that they know what these values are and can recognize them in ownership.

4. Communicate, communicate and communicate. Start each day with a "huddle-up" where you review the planned schedule for the day. Give yourself and your employees 30 minutes each morning for recognizing recurring problems, discussing solutions and getting agreement to work together. Once a week, hold a staff meeting with an agenda where performance metrics are reported versus the goals that were set. The more your employees know about these metrics, financial and otherwise, the more invested they are in a successful outcome.

5. Reward performance. People like their performance to be recognized. This can be done in a number of ways other than money. Don't misunderstand,

you should financially invest in good people but do not let this be the primary way you recognize employees. Reward and recognition should come each week, much like a coach will award a "game ball." Each week during your employee meeting, award your own version of a game ball. Combine it with a \$50 or \$100 gift card. It is not so much about *what* you do, rather that you do it at all.

All of these things create loyalty. They are easy and inexpensive to implement, and only require two things from the owner, sincerity and consistent follow through.

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GRAND RECEPTIONS

These six practices know how to get the patient experience off to a great start.

BY INVISION STAFF

You're already an INVISION reader, so we're confident you're savvy enough to know that a waiting area that looks like a DMV just isn't going to cut it. But what sort of reception set-up *is* best for you? An authoritative command center directly opposite the entrance that exudes medical professionalism and hints at the unrivaled patient care within? A funky counter and cozy furniture that says "Welcome, guest?" A personal concierge greeting customers at the front door, boutique hotel style, with a latte waiting after testing? Or perhaps a discreet antique table cleverly pushed back just far enough to give customers a glimpse of your exquisite frames on the way in? The key is to integrate the reception space seamlessly into your office, while ensuring your customers feel like they're being personally attended to and setting the tone for an experience that's memorable for all the right reasons. Here are a half-dozen eyecare businesses who know how to make a winning first impression.



**ZIEGLER
LEFFINGWELL
EYECARE**
NEW BERLIN, WI

► Co-owner Dr. Dave Ziegler got the idea for Ziegler Leffingwell Eyecare's concierge-style reception space while strolling through a hotel lobby one day. It's one of numerous features of the practice — whose design also drew inspiration from Nordstrom and Apple — intended to ensure that staff "connect with patients and treat them like family," Ziegler says. The retail and reception spaces overlap, changing up floor textures, colors and materials to create interest. Ziegler has strict rules for the concierge desk: "No clutter... Just a couple of Macs, a phone, a credit-card processing pad, and two welcoming faces. I'm a minimalist." The silent phone is for internal use only; incoming calls go to the back office. Pretest suites have glass walls for an open feel; the concierge desk staff have a view of these rooms, improving patient flow.

ARTISAN EYEWORKS

ASHLAND, OR

► For eyecare businesses looking to foster community connections, the reception area can serve as a kind of shared space. This is very much the case at Artisan Eyeworks in Ashland, OR. With a food co-op, hardware store, coffee roaster and restaurants nearby (and a yoga studio right upstairs), the business is located in the town's Railroad District, which "is really where the local people hang out," says co-owner Dr. Kimberly Hoyt. As a member of the Ashland Gallery Association, Artisan Eyeworks takes part in its First Friday Artwalks, bringing in art lovers, who discover a welcoming reception space with casual, comfortable seating and a big, colorful rug. The design makes the most of the building's high ceilings and corner light, with multi-hued wood floors and accents plus functionally beautiful fixtures that contribute to the warmth of a place where people are happy to spend time.



→ CONTINUED ON PAGE 70

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VISIONQUEST EYECARE
FISHERS, IN

▶ A beautiful reception area can serve as an aesthetic centerpiece for your office's overall design, tying all the visual elements together. Few practices demonstrate this better than VisionQuest Eyecare in Fishers, IN, where the reception desk, framed in natural stone with solid surface counter tops, pulls the exterior into the interior, creating an inviting feeling. It also functions as the start and endpoint for the patient's journey through the central core of the practice, whose circular design allows them to move from reception to testing and exam with a natural flow. This effect is heightened by the installation of natural wood-toned luxury vinyl plank throughout the public area at a 45-degree angle, which leads the client through the space to focus on the frame displays.

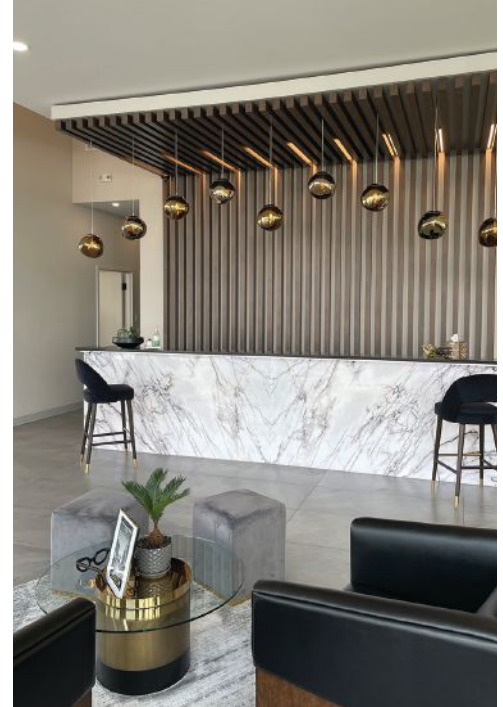
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ZIONSVILLE EYECARE
ZIONSVILLE, IN

▶ As part of its last remodel, Zionsville Eyecare removed its traditional waiting room and put in a concierge-style reception desk and hospitality bar to welcome patients. To owner Dr. Nicholas J Garn, the key to great service is "little things like ... standing to greet each person as they enter." Reception staff play a key role in implementing this philosophy, according to Patient Care Coordinator Team Lead Amy Bucci. "Our front-desk team sets the tone for the patient visit. They are the gatekeepers of the schedule and the first friendly

face our patients see when entering the building," she says. This means handling the check-in procedures and paperwork, but their duties don't stop there. "They also offer coffee, water, hot tea and snacks to our guests, take ownership of the schedule knowing who is late for their appointment, which doctors may be running a few minutes behind, or who has been waiting a little too long for their adjustment — all while keeping the patients engaged and the energy lively," she says.



SPECTRUM EYE CARE
STONEY CREEK, ON, CANADA

▶ Drs. Bitia Moeinifar and Richard Comben designed their office to look nothing like a traditional optometry office — in fact the inspiration for the space was a hotel lobby. As Moeinifar puts it, "You don't check in at a front desk, there aren't receptionists ignoring you while on the phone and you aren't bombarded by a sea of frames." To establish the "lobby" feel, they designed a large wooden slat feature wall, with gorgeous lighting and floating ceiling clouds and placed plants and trees throughout the space. Upon entering, patients are greeted by friendly staff to the sound of chill lounge music, escorted to the giant Onyx stone illuminated reception bar and served bottled water while they browse, lulled into serenity by the lovely crisp scent diffusing through the HVAC.

LOOK + SEE VISION CARE AUSTIN, TX

▶ When it comes to the reception space at Look + See Vision Care, anyone looking for old issues of Time or Money, or a TV in the corner, need not apply. Instead, the area welcomes patients into a fun and interesting book collection, curated by owner Dr. Tammy Vo herself. The library includes things like Calvin and Hobbes, pictures of dogs under water and books of short stories. "I think people really appreciate and enjoy it," she says. The music is also important. "We bump it through our Sonos speakers," adds Vo, a former piano major and violinist in an indie folk band.



Drs. Justin & Sarah Ward Longview, TX



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Buzz session with the
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QUESTION:

Spend any time on Facebook and you'll no doubt encounter posts lamenting the influences killing independent eyecare. Do you believe independent eyecare is dying? Or do you believe independent eyecare is not at risk?



ECPS TELL JOKES

Where do rabbits get their eyes checked?

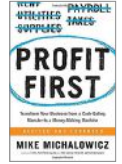
The hoptometrist.

SHARED BY CHRIS WETZLER, OD, ON FACEBOOK



DEEP READING

Profit First: Transform Your Business From A Cash-Eating Monster To A Money-Making Machine BY MIKE MICHALOWICZ



I really like this method of accounting and making sure money gets set aside for profit and payment. It makes it blatantly obvious if your expenses are too high. *Amber Fritsch, OD, Precision Eye Care, Mt. Juliet, TN*



▶ No it's not dying! We just had our biggest year ever and we have all independent designers. Boutiques like ours will stay strong with the support of customers that want quality eyewear that doesn't look like everyone else's. **Paula Hornbeck, Eye Candy & Eye Candy Kids, Delafield, WI**

▶ Independent eyecare isn't necessarily dying, but "generic" eyecare is. If you offer the basic services/products it's becoming harder to survive. ECPS can tell the difference between quality products and inferior products, but the average consumer cannot. So to them, price/ease/convenience direct their decision-making. But, if you offer specialty products/services you can stand out from the

rest and thrive. **Christine Howard, Eyes on Plainville, Plainville, MA**

▶ It's dying, but not for the reasons often listed. It's dying due to the arrogance and ignorance of optometry. They are their own worst enemy. **Dave Goodrich, Goodrich Optical, Lansing, MI**

▶ It is dying. Look at the chains, the purchase of independent eyecare practices, etc. **BJ Chambers, Carrera Optical, McQueeney, TX**

▶ We spend too much time on Facebook. Spend that time taking care of your customers, offer your full personal attention, get to know them and establish a long-term relationship.



Dave Goodrich

People will seek us out over online anytime they require repairs or have questions. We are only at risk if we lose track of our customer service. **Deb Jaeger, Eye Center of the Dakotas, Bismarck, ND**

▶ I worry about the future. Private equity is purchasing large and successful practices,

but there is still a place for independent eyecare. They can't replace us all. **Sonja Franklin, OD, Modern Eyes, Austin, TX**

▶ We offer unique care and experiences that corporate cannot. We can creatively problem solve and make the patient happy. Drop VCPs. They are not in the business of making independents

money. They are in the business of making themselves money. **Jenna Gilbertson, McCulley Optix Gallery, Fargo, ND**

▶ The old way of doing business is dying but in any industry the best always survive and adapt; the ones that don't just complain and die. **Adam Ramsey, OD, Socialite Vision, Palm Beach Gardens, FL**

▶ There may always be a place for independent eyecare, but the cost of doing business is getting higher including IT expenses, HIPAA, security compliance, and staffing. **Marc Ullman, OD, Academy Vision, Pine Beach, NJ**

▶ Private equity is becoming more common in our state. We see a shift in how doctors then play a role in their own business. It also changes the way vendors sell to private practices. Private equity companies are centralizing their frames and reps are losing territory quickly. **Heather Aites, Family Vision Center, Westminster, CO**

▶ I think it will continue to grow! We have too much

knowledge to phase out. **Caitlin Wicka, San Juan Eye Center, Montrose, CO**

▶ I don't believe independent eyecare is at risk. Consistency and retaining valued associates keep happy patients coming back year after year. **Randy McMurry, MyEyeDr, Birmingham, AL**



Diana Bishop

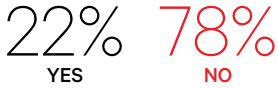
▶ It will never die. There are still many people that want a personal touch. **Diana Bishop, Eclectic Eyewear, Austin, TX**

▶ I believe it is dying. To compete, we try to offer the best service possible. Still, we are outgunned by larger competitors. Independents need a stronger, more unified voice to compete. **Douglas Holle, OD, Sunset Eye Care, San Angelo, TX**

▶ It has been "dying" as long as I have been in the industry. But the pendulum swings both ways and soon us little independents be in demand for our personal service and ability to adjust to change faster than the "big boys." **Michael Davis, OD, Opti-Care, Eldersburg, MD**

FIRE DRILL

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POP QUIZ



WORSE

Noisy neighbors 58%	Nosey neighbors 42%
Predictability 44%	Excitement 56%
Beautiful face 63%	Great body 37%
Ambition 62%	Comfort 38%
OR	
Free will 80%	Fate 20%
Smartest person in the world 73%	Richest person in the world 27%



YES 85%

- ▶ It's earned time off, based on our monthly deposits and it's only earned in three-hour increments. **Katie Billman, Meridian Family Eyecare, Meridian, ID**
- ▶ 60 hours of PTO for the first year on an accrual basis. After a year, you retain 60 hours of PTO plus we offer 80 hours of vacation. **Justin Tenczar, Berkshire Eye Center, Pittsfield, MA**
- ▶ Paid time off starts after 90 days, accumulating with number of hours worked. **Mickey Bradley, Patrick Optical, Fort Worth, TX**
- ▶ One week vacation and five days PTO. **Scott Thielen, North Country Eye Care, West Lebanon, NH**
- ▶ Eight paid holidays plus 12 hours of PTO per year. New hires receive that on their 91st day. **Amy Ward, Aloma Eye Associates, Winter Park, FL**
- ▶ Even new hires get three weeks of vacation prorated over the first

year. You simply *must* give employees time off to rest and forget

about work and it *cannot* be at their expense. It is healthy and expected plain and simple, plus it's the right thing to do! Shame on anyone in this day and age that does not provide paid vacation. **Steve Nelson, Eye Candy Optical, Cleveland, OH**

▶ After one year, seven days annually. **Emily Kincaid-Smith, Sports Optical, Denver, CO**

▶ Revamping this now. Used to be two weeks first year, changing it to one week first year because of high national turnover and it accumulates based on hours worked. **Joanne Larson, OD, Palmer Family Eye Care, Easton, PA**

▶ New hires don't get paid time off; they've got to earn it. We have a very small, cross-trained staff so retention is key. We have to

recoup our training costs before they've "earned" their benefits. Employees get sick leave at the one-year mark and paid vacation after their three-year anniversary. Sick leave doesn't roll over but any remnants get paid out as a cash bonus at the end of the calendar year. Paid vacation time is "use it or lose it." It doesn't roll over because if someone's been with us that long, we *want* them to take a break! **Jen Heller, Pend Oreille Vision Care, Sandpoint, ID**

▶ Full time get one week vacation and 24 hours sick/PTO after first year. **Samantha Hornberger, OD, Bright Family Eye Care, Lawrenceburg, IN**

▶ Vacation starts accumulating at their one-year anniversary. **Heather LeClaire, Binyon Vision Center, Bellingham, WA**

▶ A percentage of the hours worked after the 90 day introductory period. **Carol Marx, The Eye Care Center, Canandaigua, NY**

▶ "Full-timers" work 32 hours per week and get one-week paid vacation after one year, two weeks at three years, and three weeks at four years. All employees get as much unpaid time off as they want and we haven't had any issues with abuse (yet). **Sarah Brozzo, Harrison Eye Care, Harrison, MI**

NO 15%

▶ I'm a one-person operation; if no one's working no one's getting vacation pay. **Julie Uram, Optical Oasis, Jupiter, FL**

▶ I currently have no employees. **Dorothy Reynolds, Eyes on Fairfield, Fairfield, CT**

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THE CASE OF THE

LOW-INCOME DISPARITY

A PATIENT FEELS LIKE SHE GETS TREATED DIFFERENTLY BECAUSE SHE IS ON STATE INSURANCE. WHEN FACED WITH A PATIENT IN NEED, HOW SHOULD THIS EYECARE BUSINESS HANDLE IT?



CREATED BY Carissa Dunphy, ABOC. Carissa has been working in private practice optometry since 2008 and is the founder of Optician Now (opticiannow.com). Follow Carissa on Instagram and Facebook at @opticiannow.

While sitting at the front desk, Melanie got a rush of adrenaline when the front door flew open and hit the wall behind it, making a loud bang and shaking the wall. The woman who had so forcefully opened the door came rushing in, clearly in a hurry, and approached her.

"I am here for my appointment. It was supposed to start 10 minutes ago; I am so sorry I'm late but I don't have a car and the bus was running behind." She frantically continued, "I am so sorry, can you please still see me? It's so hard to make appointments around the bus schedule. The last place I went wouldn't see me when I was late but I think it was because I have state insurance and they just didn't want to see me."

Melanie reassured her, "Ms. Miller, we can definitely still see you if we get you back right away. Leave your insurance and identification cards with me and I will bring them to you in the exam room when I get all of the information I need. Trish will take you back now."

As Melanie handed the patient off to Trish, the technician, she noticed that the patient was still quite amped up.

The moment Ms. Miller sat down she blurted out, "Please only do the tests my insurance

pays for. I can't afford anything extra."

Trish was somewhat surprised by the loud and robust remark, but responded, "I completely understand. We do a thorough and comprehensive eye exam, all paid for by insurance. If the doctor feels he needs additional testing he will go over that with you — you won't have any surprise charges."

"Okay," Ms. Miller continued. "The last place I went made me feel guilty about saying no to anything that cost extra. As soon as I said no to the test I felt like the level of care towards me went into the crapper and it was very uncomfortable."

A bit later Dr. Goodell approached the optician, Bernie, to fill him in on the exam findings and hand off the patient. "Ms. Miller's eyes are perfectly healthy but she's a -4.25 with just over 2 diopters of cyl." The doctor continued, "She definitely needs new glasses; she said her last pair was broken beyond repair a while back."



ILLUSTRATION BY KARINA CUZON

Bernie went out to optical to meet Ms. Miller. "Hello, I'm Bernie, your optician, I'll be helping you with all of your glasses needs today."

They sat down and Ms. Miller got straight to the point. "My last pair of glasses were almost 20 years old and they had been broken and rebroken over the years and finally bit the dust a few months ago. I know I need new glasses but my insurance only

pays for my eye exam."

Bernie felt bad for Ms. Miller because she needed glasses badly, but at the same time he was part of running a successful business. He definitely felt backed into a corner on this one...

* Real Deal scenarios are inspired by true stories but are changed to sharpen the dilemmas involved and should not be confused with real people or places. Responses are peer-sourced opinions and are not a substitute for professional legal advice. Please contact your attorney if you have any questions about an employee or customer situation in your own business.

THE BIG QUESTIONS

ONLINE EXTRA! Check out other Real Deals and comment on this one at invisionmag.com/realdeal



- ▶ In your experience, do low- or fixed-income patients, or those on state or federal insurance plans, seem to be treated differently when seeking eyecare?
- ▶ Could you ... would you ... talk to the owners about a payment plan for this patient? Or is business business and it's the patient's responsibility to figure out how to get glasses?
- ▶ Does your business have a system, program, or protocol in place — be it a go-to lab and frame company or local organization that donates eyeglasses to those in need — you rely on in these circumstances?

Tina Robinson

PRO OPTICAL
WEST LEBANON, NH

I have witnessed individuals who are lower income be treated differently. Our policy is that a deposit be made before glasses are ordered. The patient may make payments but is not allowed to take the glasses until they are paid in full. We work with agencies such as Lions Club and health foundations that provide glasses for low-income individuals.

Jennifer Skinner

EYE CLINIC OF GREAT FALLS
GREAT FALLS, MT

Yes, low income, and even state insurance patients, are treated differently. It's impossible not to notice; we should meet every patient with equal respect and care. Our clinic would ask for a payment plan to be set up for this patient. Not being able to get the glasses you need over money is the silliest thing ever. Everyone deserves good vision. We have multiple ways of assisting patients in these situations; frames and lenses at lower cost, give-away frames, discount frame packages,

and affordable vision provisions. We all have to change the way low-income vision needs are met, and it has to start with equality and respect.

Justin Tenczar

BERKSHIRE EYE CENTER
PITTSFIELD, MA

I do feel that some staff in many locations look down on state and federal sponsored insurance plans and subscribers. I personally do not. We have adopted the philosophy that all patients are created equal and we strive to treat everyone with the same level of respect and care. We dispense eyewear in a tray, accompanied with a complimentary cleaning cloth, hard case, and a bottle of spray cleaner — regardless of the insurance used. We have on occasion provided patients with glasses at no cost. Whether it was a veteran that wasn't able to be easily transported to the VA Clinic, or a cancer patient down on their luck. Our company absorbed the cost. We're lucky we have great leadership and ownership that allows us to do that from time to time.

Haley Menge, OD

HI-LINE EYE CARE
GLASGOW, MT

State insurance patients are not treated differently in my office. No payment plans; I've been burned too many times. I deliver top quality care and products; if our products are outside a patient's budget, that's OK. I'm not in a race to the bottom. I will be beat in price; but not in quality of care or patient experience. Most of my patients who purchase elsewhere will come back for care — and I'm OK with that. We have a non-warranted line we offer that is significantly less.

John LaShorne

BROWN COUNTY EYE CARE
NASHVILLE, IN

As an optician I have two responsibilities, first to my employer and then to the patient. I would explain to the patient the costs and payment policies of our value lens/frame combination. If this is not affordable, I would make sure her Rx included her PD and let her shop for her best option. My job is to help, not judge. I would not however try to change company policies to accommodate an individual.

Jennifer Heller

PEND OREILLE VISION CARE
SANDPOINT, ID

We have a huge base of low- or fixed-income patients. Many of our doctors and staff grew up below the poverty line, so we know that low-income customers just want to be treated equally. Accordingly, all customers are allowed to order a pair of glasses with half-down, and make

payments on the other half until they're paid in full before the glasses leave the clinic. We've also partnered with one of our labs to offer a Value Package for back-up glasses or for the less affordable seasons in life. No income requirements to qualify but no warranties and only very basic lens options. If she walked in our front door today, Ms. Miller would be able to get a functional pair of single vision glasses from us for \$54.95 — but so would anyone. And *that* right there is the key.

Chris Dudley

ABB OPTICAL GROUP
CORAL SPRINGS, FL

I've heard remarks from associates when someone has a "state" plan. Humility is the key. And compassion. For the cases I've been part of, how it was handled depended on the employer. Some had a charitable arm. Others had selections of reasonable or extremely inexpensive frames and we partnered with a lab or lens rep or we'd find a reasonable payment accommodation. Again the key is remaining humble. How would you want your mother or spouse or child treated? How would *you* want to be treated?

Michael Young, OD

REDDING EYECARE CENTER
REDDING, CA

We accept low-income patients and participate in a local program that helps the working poor get eyecare and glasses. The exam and glasses are free and the program is available through a local charity organization. We offer a budget line of frames and lenses for the low-income population.

"We have a couple of good go-to organizations that help with glasses for all ages. We live in a retirement community that is on mostly fixed income so it is nice to have programs to help out so we don't have to cover everything. There are parameters set for price of frame and lens options covered by these entities but most are so grateful for the help they even stay below covered options."

JANA OLIVER, THERMOPOLIS EYECARE, THERMOPOLIS, WY





QUICK FACTS: **OWNER:** Mirjana McCarthy, OD | **URL:** modaeyecare.com | **FACEBOOK:** [facebook.com/modaeyecarellc](https://www.facebook.com/modaeyecarellc) | **INSTAGRAM:** [instagram.com/modaeyecare](https://www.instagram.com/modaeyecare) | **YEAR FOUNDED:** 2017 | **YEAR OPENED FEATURED LOCATION:** 2018 | **EMPLOYEES:** 1 full-time, 4 part-time | **TOP BRANDS:** Dita, Mykita, Lindberg, Thierry Lasry, Anne et Valentin | **AREA:** 950 sq. ft. | **BUILD OUT COST:** \$300,000

MODA EYECARE / CLARENDON HILLS, IL

A SMALL WONDER

This Chicago OD had a solid reputation for eyecare but didn't feel complete until she opened a space in which to curate a spectacular frame collection.

BY HEATH BURSLEM

Growing up, Dr. Mirjana McCarthy always enjoyed art and science at school. Getting her Doctor of Optometry degree fulfilled her love of the latter and steeped her in the world of medicine, but after establishing herself as an OD she found that “with every optometry job something was missing.” It wasn't until an opportunity arose to take over a 70-year-old practice in Clarendon Hills, in Chicago's southwestern suburbs not far from where she was born, that McCarthy finally

got to meld art with science and truly felt complete. Adding another string to her bow as an eyecare professional, she threw herself into the world of frame curation. At Moda — which, after all, means “fashion” — she now offers not only a full spectrum of optometric care but also some of the finest frames from the likes of DITA-Lancier, Götti, Anne et Valentin, Mykita and more.

As they planned their sleek new office, McCarthy and her husband Dan tried to create a “unique urban space in the suburbs.” Given the limited room they had to work

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with — the space measures just 950 square feet — they had to be creative in not letting any of it go to waste. Numerous features of the space reflect this, including its pocket doors and window displays for frames.

In tandem with the focus on curated independent frames, Moda prioritizes a personalized touch when it comes to the medical side of things. This begins in pretesting, which McCarthy handles herself in order to spend more time with each patient. “We pride ourselves in offering new technology so that each exam is thorough and complete,” she says. “With the office being smaller and more of a boutique feel, we keep the appointments spread out to ensure I have enough time to spend and get to know each patient.”

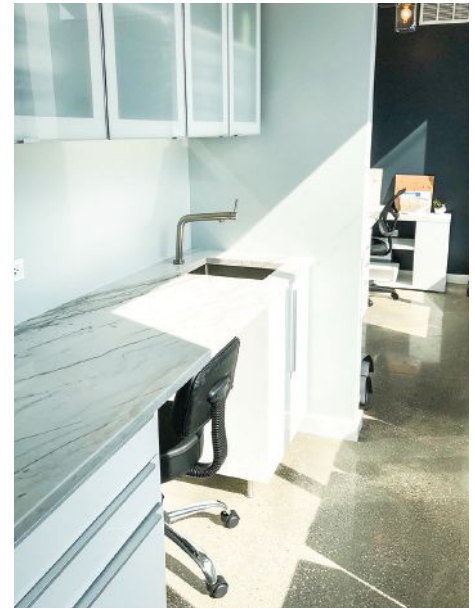
McCarthy’s skills include medical optometry, dry eye treatment, pre- and post-operative care with refractive surgery, and scleral contact lens fittings, among others.

The website is of a piece with Moda’s branding — elegant and uncluttered with plenty of space given to the practice’s extensive offering of independent frame lines, as well as contact lens ordering and appointment scheduling. “When orders are received in our EHR patients immediately receive a text or email depending on their preference,”

says McCarthy.

Moda EyeCare does engage in marketing on social media, but the business’s primary focus in this area is on trying to sponsor local events as much as possible. “We feel that is not only a great way to market, but a fun and rewarding way to make the community bet-

→ CONTINUED ON PAGE 80



FINE STORY

When Dr. Donald Maduzia put his practice on the market in 2017, McCarthy happened to catch the ad on the very day he posted it. She looks back on that as a sign that she was fated to take it over. Maduzia had operated the business for three decades after acquiring it from another OD who had been in Clarendon Hills for some four decades. “I liked the idea of keeping it going along with keeping it up to speed with technology. The history of this practice being here in Clarendon Hills for so long was definitely appealing to me,” she told the *Chicago Tribune* at the time. “There are some longtime patients, even some who first started coming here before Dr. Maduzia took over. I really love the whole feel of Clarendon Hills. I think it was a good choice coming here.”

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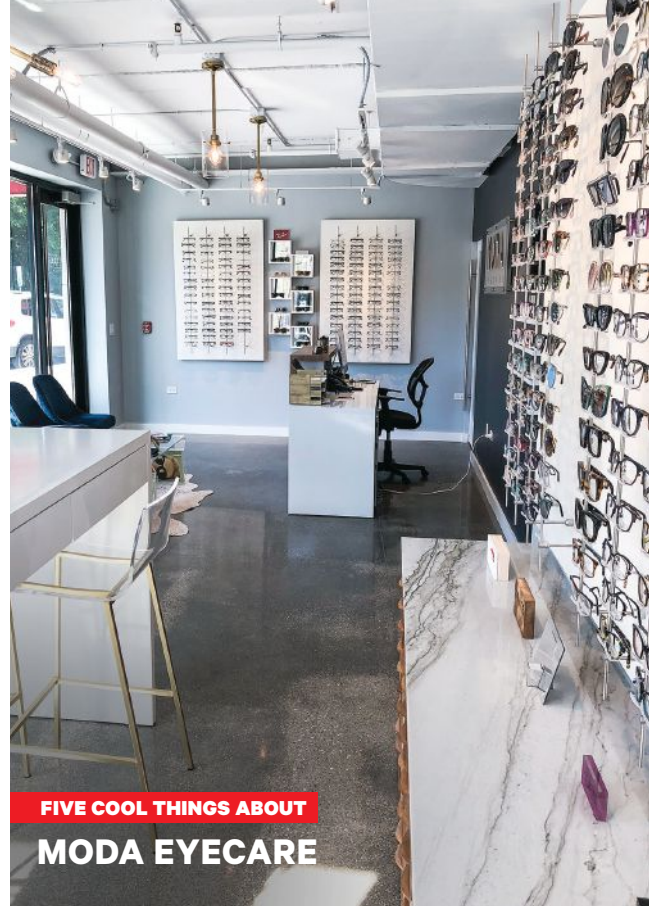
→ FROM PAGE 78

ter,” says McCarthy. Having said that, the practice’s social media accounts are well-tended; all the images are original and the tone is kept fun, with McCarthy’s sense of humor coming through strongly in her posts featuring customers in their new frames and holding felt letter boards displaying

various witticisms. Other posts feature short videos showing the in-house edger at work, demonstrations of specialty contact lenses and new frame offerings.

One of the aspects of Moda that McCarthy is most proud of is her team: “My staff is super fun to work with,” she says. “They share the same love I have for unique eyewear, dogs and coffee. They are great at styling patients and making lens recommendations.”

Ultimately, Moda is a fusion of all that McCarthy loves about eyecare. “I created an office where I get to practice medical optometry to the highest degree and get to express my creativity through designing the office, creating the website, and curating each and every piece of handmade independent eyewear. To me the frames we carry are a piece of art.”



FIVE COOL THINGS ABOUT MODA EYECARE

- 1 PAWSITIVITY.** The practice is dog friendly... Just ask McCarthy’s French bulldog Jacques. ... the reminding two? 4-stars. office finishing for most prescriptions.
- 2 VERDICT IS IN.** At the time of publication, 34 of Moda’s 36 Yelp reviews were 5-stars
- 3 GRAB A CUP.** All customers are offered a fresh mug of locally roasted coffee or sparkling water.
- 4 ON THE SPOT.** Moda offers in-
- 5 EYEWEAR FAN.** In a recent Instagram post, McCarthy displayed seven favorites from her personal eyewear collection ... one for each day of the week.



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Sanity Files

HOW EYE PROFESSIONALS KEEP THEIR COOL IN A CRAZY WORLD



CARISSA DUNPHY

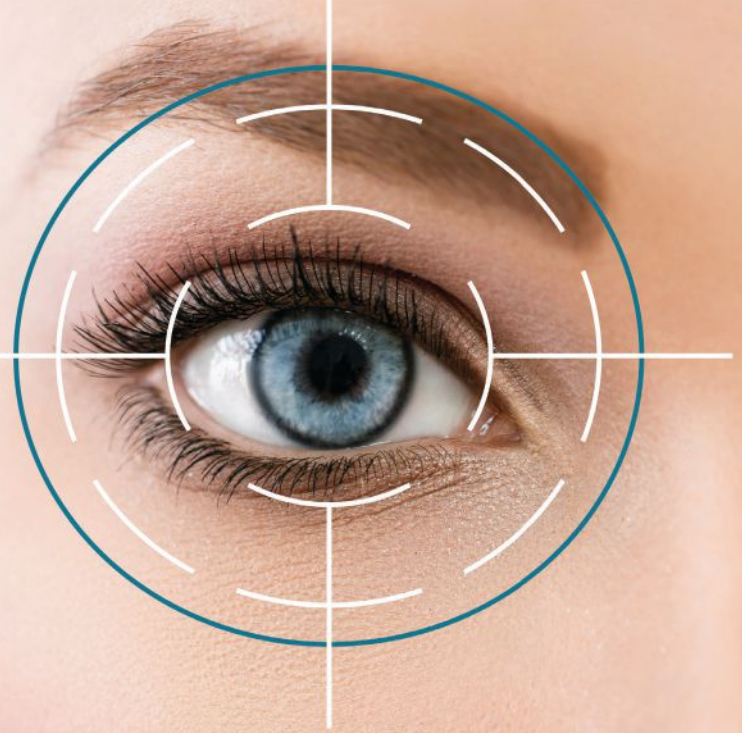
MONROE VISION CLINIC, MONROE, WA

ABOC, FNAO, manager, marketer, writer, influencer, Carissa Dunphy is an optical multihyphenate. "I am a logistics and data person and I love analyzing where efficiencies and savings can be improved," is her response when asked what she loves about managing an optical business. She also loves "collaborating with other industry people," which likely explains how she's acquired all the hats she wears. But Carissa is still a mortal, so she too is frustrated by the recent difficulties finding staff. "It is proving to be very difficult to get anyone to apply for a job, let alone find a good person to fill a position." She thrives on her many projects but when stress rears its ugly head she has an immediate remedy. "I have an indoor rowing machine and it's turning out to be like a drug addiction for stress and anxiety relief." A few other things on her unwind list: feeling the sun or seeing a sunset, making pizza from scratch with the family, catching up on Instagram, playing Angry Birds, dogs, and the softest comfiest pants. Amen!



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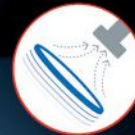
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