



**INVISION's master list of the most important skills, resources, tools and facts no eyecare pro should be without.**

BY INVISION STAFF

**2024 MARKS** INVISION's 10th year covering this complex and dynamic industry, and it has been our privilege over the course of that decade to tap the experiences, advice and insights of some of the best minds and most successful businesses in this field. It seemed an appropriate time to take stock and distill some of that wisdom. Below is INVISION's list of the 100 things we think every eyecare professional should know. Road-tested, practical, generous, savvy, occasionally counterintuitive and often wise, we hope it does what everything in this magazine strives to do — make you a better ECP.



→ The first thing every ECP should know, says Angel Miller at Cynthiana Vision Center in Cynthiana, KY — as well as more than a few other of our Brain Squad members — is simple: “How to repair glasses. So many patients are on tight budgets/fixed incomes. They deserve our help and compassion, too, even without a chance of transaction.”



→ To Google, you are what you “eat,” says StrategyWerx. Your website ranking reflects your Expertise, Authoritativeness and Trustworthiness. Start with a Q&A page about what you do, keep your “About” page current and ensure basic details are precisely the same throughout.



→ It's easier to bestow autonomy than it is to take it away. So, clearly state directions, expectations and oversight when employees are new. Then, let them earn autonomy and flexibility, says Bob Nelson in 365 Ways to Manage Better.



→ Limit in-store promotions to one a quarter, says Porte Marketing Group. “Too many promotions can drain your sales staff and take away some of their punch.”



→ When it comes to more expensive frames, remember that customers are often looking for permission to buy. “Providing good service means giving it to them

by asking for the sale,” says Kate Peterson of retail consultancy Performance Concepts.



→ Searching for a billboard location? Remember, a major artery used twice a month by a large population may not be as good as a smaller route used by the same people twice every day of their lives, says “Wizard of Ads” Roy Williams.



→ You are legally obliged to pay an overtime premium, usually 50%, be it in dollars or minutes but you can usually offer four 10-hour shifts in a week and not break the 40-hour threshold. Check dol.gov and your state labor office.



→ Online clinical and coding references abound: “I use Eyedock daily. It is a great resource for medications, coding, and contact lens calculations/parameters,” says Dr. Angie Pattenon at Sunset Eye Care in Johnson City, TN. (See also Opticampus, icd10data.com, and the ICD 9-10 app.)



→ “Everyone should take at least a basic accounting class,” says owner Mitch Peterson at Seek Eye Care, Victoria, MN.



**Scarcity is a central concept in economics ... and retailing. “Don’t display multiple of the same items. Only put one on display at a time; keep the ‘Urgency to buy it before it’s gone’ feeling,” says sales pro John Nicolosi.**



→ There are only two customer feedback questions that matter, says Buzzmarketing: 1.) “How did you hear about us?” (tracks word-of-mouth and marketing effectiveness) and 2.) “Would you go out of your way to recommend our product to a friend?” (measures “buzz.”)



→ Bad breath is a stone-cold sales killer. The offending salesperson must be told. Do it in private, use gentle but accurate language (“You’re probably unaware but your breath is rather sharp.”), and offer paid time off to go see a dentist or doctor.



→ Always respond to crazy online complaints, and do it with patience and respect, says small-biz consultant Andrea Hill. Like so: “I’m so sor-

ry. We weren’t actually open last night when you were disrespected, but how can we help you?” Remember, you’re doing it for prospective (sane) clients.



→ No, the Small Business Administration doesn’t offer loans, it guarantees them. And they aren’t just for startups and don’t require collateral or guarantees. Visit sba.gov.



→ When setting growth goals don’t just pluck a dollar figure out of the air. Pick a “forward indicator.” It could be the number of follow-up phone calls staff make — anything that experience shows will boost sales.



→ The hidden cost of lab re-dos has been put at \$10,000 (in labor costs) for the typical U.S. practice. Get your checklists in place and your homework done on every patient, every time.







→ “Being able to transition from one situation to another quickly without carrying the emotions from one to the other,” was singled out as the essential skill for an ECP by Amie Robinson, optical manager at Spring Hill Eyecare in Spring Hill, TN.



→ Elder employees are often more responsible, call in sick less, work harder, don’t get involved in office politics, and have good life skills. But at the end of the day, make sure your staff reflects your demographics.



→ When is it time to stop adding on (treatments, second pairs, accessories, etc.)? When they stop buying. Ask with grace and genuine interest in the customer’s well-being and you will leave only a favorable impression.



→ As a marketing tool, email continues to boast higher open rates than social media posts, as well as high ROI. Social media, of course has massive reach and is inexpensive. Maximize both.



→ “Every ECP should know how much vision plans are charging for product versus what they can negotiate privately. Because math,” says Nikki Griffin at EyeStyles Optical and Boutique in Oakdale, MN.



**Shoplifting red flag:** A customer who asks to see or tries on numerous frames and then folds them as he puts them back on a countertop should be viewed with suspicion, a security agent told a reporter from the *New Yorker*.



→ In the era of Yelp and Google reviews, word of mouth has taken on a whole new meaning. Online reputation management platforms like Weave, Podium, Yotpo and Grade.us can help.



→ Save window cleaning for a cloudy day — the sun’s rays cause streaking — and start indoors. Spray the panes with water and a few drops of dishwashing liquid and wipe clean with a microfiber cloth. No squeegee, no newspaper to dry the panes.



→ The single biggest trigger of IRS employer audits is when a non-employee you were paying in cash is

let go or gets sick and files for unemployment or disability insurance. You’ll need to show they were an “independent contractor” with a Form W9 and maybe even a contract.



→ March is a great month for a trunk show, says Paula Hornbeck, owner of Eye Candy & Eye Candy Kids in Delafield, WI. “People are ready to freshen up their look but it’s too early for spring clothing...” ... but just right for some stylish new glasses.



→ Your employee manual should, for starters, tackle all the stuff that could get you (the owner) in trouble (think harassment, discrimina-

tion, HIPAA, etc.), deal with full and part timers in separate sections, and cover overtime, time off and benefits, at a minimum.



→ Bought email lists and automated address-harvesting programs are costly and punished by Google. Better to build a quality list of subscribers who have opted in.



→ Lack of assertiveness in emails can make it hard to set a professional tone. Just Not Sorry ([invisionmag.com/062105](http://invisionmag.com/062105)), a free Gmail plug-in, identifies qualifying words and phrases like “I think,” “just,” “I’m no expert,” and “sorry” so you can rework them.



**“Do not live in fear of bad reviews,” counsels Dorothy Reynolds at Eyes on Fairfield, Fairfield CT. “Stick up for your staff. Do not give in to unreasonable requests/demands.”**



**“The use of humor in everyday activities,” says Mark Perry OD, at Vision Health Institute in Orlando, FL, is the first thing an ECP needs to master. “I have found that keeping the staff, fellow doctors and externs laughing during the workday can make the day, not only pass quickly, but also makes it enjoyable to come to work each day. As they say — “life is too short” so you might as well make it entertaining!”**

worth of private-pay work to a lab each month; staff are willing; your store has room for it; and you have established Rx volume in place, says Jaysun Barr, senior consultant at Santinelli International.



→ Google domain names start at \$12 a year for those with generic extensions like .com, .org, and .net. (They also offer a vision extension for \$30.) A small price to pay to be viewed as professional and trustworthy.



→ The magic words for an annual review: “I’m giving you these comments because I have very high expectations and I know that you can reach them.” Why? According to performance consultant Daniel Coyle, it builds trust.



→ Stay on top of insurance billing and follow up on rejected claims, advises Susan Kantor at Central Phoenix Eyecare, Phoenix, AZ. “A critical revenue stream not to be missed!”



→ If you use any of these passwords — x, Zz, St@rt123, 1, P@ssw0rd,

bl4ck4ndwhite, admin, alex, ....., administrator — you’ve basically left the key in the door. According to a year-long, 119-country study by information security firm Rapid7, they’re the top 10 hackers try first. “.....” Try harder people.



→ “Use QuickBooks to run your office. It gives you the pulse of your practice,” says Dr. Robert M. Easton Jr. in Oakland Park, FL. Other accounting software packages suitable for small businesses: Xero, FreshBooks, Sage 50cloud.



→ Always be cheering: A University of Texas study found that once they stopped getting inspirational messages, “On average, a sales worker pulled 3.5 fewer potential new customer profiles from the company database and made 8.4 fewer phone calls per day.”



→ If asked for a reference for an employee you fired, you can be less than glowing, but don’t fire off a bunch of explicit claims you can’t back up with documented evidence. Lawsuits are possible.



→ Tax advice should be industry-specific: Consult regularly with a tax pro who knows where the savings peculiar to the eyecare industry lie, say Nathan Taylor and Wade Weisz, OD of For Eyes Bookkeeping.



→ Show restraint with vendor-provided displays, says merchandising expert Larry Johnson, pointing to problems like mismatching colors, overbearing logos and “displays that are too big for the amount of business you expect them to generate.”



→ Press some flesh occasionally: “There are groups in my town that only allow one person per business-type that have over 50 members and no vision pro. Find

a large group of this type and join fast,” says sales trainer Christopher Mee.



→ No, a retailer can’t say they’re selling at ‘wholesale’ prices ... unless they really are. Many states have strict laws prohibiting the use of the word “wholesale” in retail advertisements. In some states, this is a criminal offense.



→ When you’re delivering good and bad news to staff, give the bad news first, says Daniel Pink, author of *When: The Scientific Secrets Of Perfect Timing*. “Given the choice, human beings prefer endings that elevate.”



→ If the time has truly come that you must

fire a customer, have a favorite, polite-but-firm phrase at the ready, like: “We want our patients happy. We can’t seem to help you anymore. I’m sorry.”



→ Dreaming of trading your high-traffic city location for a low-rent spot in a picturesque coastal town? Any time you surrender location you’re taking a big, big risk in retail. It’s unlikely your existing customers will follow you.



→ 50% of all searches are made by voice. Is Siri aware of your business? Here are some resources for listing: PageCafe, Enests and SiriUser-Guide.com.



→ Consider adding a lab if: You’re sending \$3,000





**“If the circus is coming to town and you paint a sign saying, ‘Circus is coming to Fairgrounds Sunday,’ that’s advertising. If you put the sign on the back of an elephant and walk him through town, that’s a promotion. If the elephant walks through the mayor’s flower bed, that’s publicity. If you can get the mayor to laugh about it, that’s public relations. And, if you planned the whole thing, that’s marketing!” You’re welcome.**



→ A recent survey of over 1,300 U.S. consumers found that 58% have decided not to do business with a company based solely on the business’ website. People are judging your book by its online cover.



→ Micro-influencers can give your holiday season marketing a late boost in your local market. According to **FORBES** ([invisionmag.com/112205](https://www.invisionmag.com/112205)), they work fast, can target a niche audience, and are “often considered more reliable by their followers.”



→ To get better phone service from big vendors, advises Kate Peterson at business consultancy Performance Concept, befriend the person on the line with some friendly chat and ask for their direct extension. Next time, “You’ll be amazed at how quickly that person can get things done for you!” she says.



→ Never light frames from the back, says LensCrafters founder Edward Dean Butler. Light them from the front using a tungsten filament color. Use pro-

fessional lighting colors (e.g. salmon pink, not high kelvin/blue-white. Warm white is OK.); and never use bright lights. “Surface imperfections and dust show up and turn off customers,” he says.



→ The legal landscape has shifted in the last decade and most jurisdictions now have “apology laws” that prohibit certain statements of remorse from being used in a lawsuit. But check your state’s laws to be on the safe side.



→ There is a perfect length for marketing messages and that length is 17 words, says the very sure of himself Rudolf Flesch in *The Art Of Plain Talk*. Keep it simple, stupid.



→ Up your phone game: According to John D. Marvin, president of Texas State Optical, practices can boost annual revenue by \$72,000 for every 10% increase in new patients who schedule an appointment, and 95% of appointment enquiries are still done over the phone. Does your phone staff’s training reflect this?



→ “Always make sure a frame is adjusted properly before taking measurements,” is the first piece of advice Adam Doyle, manager at Pearle Vision in Madison, AL, has for prospective ECPs.



→ POS = Smoother cash flow. If you’re off by more than 5% of your receivables each month when projecting cash-flow needs, you’ve got a problem. Your POS systems should be helping you with this. If not, find a tutor — quickly!



→ “In order to find good staff,” Dr. Ben Thayil at Lifetime Vision and Eye Care in Miami, FL, tells us, “you have to realize good staff members aren’t found. Good staff members are made. Making a good team is all about culture and leadership.”



→ Optical pays the bills: “We implemented a serious inventory and pricing strategy which proved wildly successful in just two weeks. We should have started with [it],” says Dr. Larah Alami, owner of Hudson River Eye Care in Tarrytown and White Plains, NY.



→ When asked, “How much?” get straight to the number. If you start with a sales line like, “Madam, you have excellent taste,” you’ve lost them. Start with the price, followed immediately by the features; the things you list will make the price seem cheaper and cheaper.



→ Can’t figure out where to start with blogging? Business blogger Marcus Sheridan says: “Start with the questions you get every day. Take those

100 questions and turn them into 100 blog posts with those questions transformed into the titles.”



→ If you’re looking for resources within a particular community, the Native American Business Association, Latinos En Optometry (co-founded by long-time Brain Squad member Diana Canto Sims), Black Eyecare Perspective and Asian-American Optometric Society are just a few places to start.



→ The best format for customer testimonials? “Video is active, alive and believable. Video is power,” says sales trainer Jeffrey Gitomer. Get them on your website and in-store screens. Here’s how it’s done: [invisionmag.com/022401](https://www.invisionmag.com/022401) (via Berkeley Eye Center).

# PARADIGM



## Style Meets Sustainability

EYEWEAR FEATURING ACETATE RENEW WITH ISCC-CERTIFIED RECYCLED CONTENT

We're proud to offer optical & sun styles made of sustainable acetate composed of more than 25% recycled content\* and 40% bio-based content\* from renewable resources.

Schedule an appointment with your Kenmark Eyewear Sales Consultant or shop online.

\*CALCULATED USING THE MASS BALANCE APPROACH



\*FSC – PEFC CHAIN OF CUSTODY CERTIFICATION





→ We nearly all use them, but to-do lists don't have a great record. Studies show the vast majority of items never get done. If you must, here's a flowchart tool to make it more productive: [invisionmag.com/022402](http://invisionmag.com/022402).



→ Music streaming services for retailers are getting sophisticated with platforms like Soundtrack Your Brand, Pandora for Business and Rockbot able to target demographics and correlate sales data with what is played.



→ Subjects restricted to six hours of sleep a day in a U Penn study showed steadily deteriorating performances in cognitive tests, and by the tenth day were doing as poorly as those limited to four hours' sleep or less.



→ Make financial hay while the sun shines: Management guru Peter Drucker told INC. com, "I saved more new enterprises than I can remember by simply telling the founder who showed me how beautifully things were going, that now is the time to provide for your next financing... You'll get it and at favorable terms."



→ If working out percentages, such as a 4% discount on a \$75 item, trips you up, keep this hack in mind: It's often easier to flip the sum, i.e. 75% of 4 (for which the



**When dealing with an implacably disgruntled customer, says business coach Candace D'Agnolo, the best approach is to ask them straight out what it is they want rather than offering up your own solution. "Listen, empathize, then ask, 'How can I make this right?'"**

his book *201 Secrets Of A High-Performance Optometric Practice*, Bob Levy suggests saying: “Mr./Mrs. Smith, I know how you feel. Many patients have felt exactly the same way. But, after a little practice, they found that the process was far simpler and easier to do than they initially thought. You will, too.”



→ “Bless and Release” is a concept Dr. Angie Patteson finds works for her at Sunset Eye Care. “When a patient blows up... let it go. Don’t mull the situation over and over in your mind. Deal with it calmly, then release the patient from your care.”



→ Have you ever ended a long email with “Thoughts?” Bad idea says email app maker Sanexbox. Be specific. Say “Do you think we should do X, Y or Z?” to save time.



→ Location = advertising. Ad guru Roy Williams suggests thinking in terms of “total cost of exposure” being equal to your “cost of occupan-

cy" (usually rent) plus your ad budget. Saving money by investing in a weak location means you have to spend more on marketing.



→ Your marketing should offer a certain number of “ways,” “keys,” “secrets” or “ideas” to solve a problem, says marketing company Prime Concepts. (“Three keys to protecting your vision,” “Five reasons now is the time to come in for a check-up,” etc.)



→ The answer to the question: “Will you match this online price?” is.... A loyalty program. It allows you to quickly explain how your prices are about the same, or even lower, if they join your program.



→ Need a font for a logo, sign or sandwich board? You need [letterheadfonts.com](http://letterheadfonts.com).



→ One more thing you're doing wrong: Coffee. In *When: The Scientific Secrets Of Perfect Timing*, Dan Pink says don't reach for it when you wake up. "Wait 60 to 90 minutes, which is when your cortisol levels start to decline," he says.

For all-around performance  
and protection, we've  
got you covered.



Lenses that keep pace with an active lifestyle without compromising quality.

With PPG TRIVEX® lens material, your patients don't have to sacrifice performance. Lenses made with *PPG Trivex* material are ideal for anyone who leads an active life and expects clear, crisp vision, lightweight comfort and the ultimate in protection from their eyewear.



**Become part of the PPG TRIVEX® team!**

To learn more, visit [www.ppgtrivex.com](http://www.ppgtrivex.com)







→ On your walls, use paint. It doesn't stand up as long as wall covering but it is less expensive and it allows you to change the character of the interior more often. One of the walls should be an accent color, everything else neutral. Change the accent color as often as you've got the budget for it.



→ Help with rostering is at hand. Focus Eye Care in Hackensack, NJ, recommends the WhenIWork app. "This tool lets us post staff schedules right to their phones," says co-owner Vlad Cordero. See also Homebase, Deputy and Buddy Punch.



→ Open slots in your appointment book should be shared on Facebook. Sample message from the gang at Park Slope Eye in Brooklyn, NY:

"We are back in the office today with a few appointments left! Click the 'Book Now' link to set one up now!"



→ Email messages that have an "exclusive" offer in the subject line, such as "Private event" or "For select customers only," can generate an additional 24% open rate, says Constant Contact.



→ Hesitant to ask for referrals? Get over it. Optometry practice consultant Bob Levoy offers this approach: "We need and appreciate your referral of friends to our office." That'll do — insistent yet dignified.



→ A shamefully overlooked low-cost marketing device: the blackboard. Get one made with your biz name and logo and feature specials and new product in colorful chalk. (Warning: Gateway drug to the intoxicating world of sandwich boards.)



→ Public radio can be a good way to reach presbyopes — the median age for NPR listeners is 54 — via 'sponsorship announcements.' Seattle, WA-based 4 Your Eyes Only uses NPR affiliate KUOW to reach its up-scale clientele.



→ You need a will. Without one, state law — they vary significantly — usually decides who gets what from your estate. Get writing!



→ You're probably on the lookout for staff right now. If you're on the fence about someone, keep in mind this simple reminder from Jim Collins, author of *Good To Great*: "When in doubt, keep looking."



→ Trying to calm down during an anxiety attack is futile. Instead, try saying: "I am excited." Anxiety and excitement are both arousal emotions, so it's easier to get from one to the other than to shift gears, Harvard researchers say.



→ The best way to boost impulse purchases? Put your staff in your frames!



→ Online communities beckon: "Our doctor has an email group that she goes to regularly to ask questions and share knowledge," says Lisa Smith at Precision Eye Care in Vancouver, WA. Facebook alone has dozens of ODs and opticians groups.



→ Jen Heller, office manager at Pend Oreille Vision Care in Sandpoint, ID, asks that we reconsider reframing this list slightly. 100 things to "know"? she asks. "How about do? Know how to live with compassion. Let's clarify that to be true compassion, rooted in integrity and kindness. You can learn any skill, build any cheat sheet, compile any number of checklists. But if you don't have the

skill of empathy ... your patients might show up at our clinic for a second opinion, no matter how high quality the care you rendered." To which we say: "Hear, hear!"



→ Tag lines should underscore your credentials or offer some sort of social endorsement ("Where Townsville Shops for Eyewear"). Stay away from "one-stop shop," say marketing experts Dr. Jennifer Lyerly and Dr. Darryl Glover.



→ Customer surveys work best as multiple choice, sent out on a weekday (but not a busy time of year) with an incentive (a coffee or a discount). Online options abound: SurveyMonkey, Zoho Survey, SurveySparrow, etc.



→ As outdoor temperatures rise and fall, getting your indoor level just right can be surprisingly tricky. Retail environment experts recommend raising your thermostat to around 74 or 76 degrees in summer and lowering it to between 68 and 70 in winter.

**ALL:** We'll leave you with this, the tip to end all tips, the ultimate 'thing an ECP needs to know', from Dr. Cynthia Sayers, owner of EyeShop Optical Center in Lewis Center, OH. We're not entirely sure it's possible, but we admire the old-fashioned gumption. "Know how to do everything in your business," she says. "I can run all of the equipment, know how to fix it, check out a patient, put through orders. I don't have to but I know how." Love that spirit!

#100: Visit [invisionmag.com](http://invisionmag.com) at least once a day!

[invisionmag.com](http://invisionmag.com)

## INTRODUCING TORTOISE SHELL

nano #indestructible

3 NEW COLOR COMBINATIONS

TORTOISE SHELL/BLUE

TORTOISE SHELL/BROWN

TORTOISE SHELL/BLACK

BY ALTERNATIVE AND PLAN B EYEWEAR

1-888-399-7742 [planbeyewear.com](http://planbeyewear.com) [customerservice@alternativeeyes.com](mailto:customerservice@alternativeeyes.com)

INDUSTRY LEADING THREE YEAR UNCONDITIONAL WARRANTY