

CONSULTATIVE SELLING PATIENT JOURNEY

Consultative selling (needs-based selling) focuses on understanding and addressing the specific needs of the patient. It involves identifying the patient's goals, challenges, and pain points, and then positioning our products as the solution that best meets those needs.

LEARN about the patient by reviewing history and insurance, even before they arrive. When in clinic, facilitate a conversion around lifestyle, pain points, and needs. Ensure this information is travels with the patient.

LISTEN actively during patient hand-off and ensure to ask additional questions to understand the patients needs. This will guide your sales approach and what products and services to recommend today.

LEAD with a single recommendation for each product to meet lifestyle or prescription needs. Assume the sale and create value. Showcase our preferred products and share the benefits with the patient.

Prepare

Learn

Listen

Lead

Review

After

STANDARDS

Fill the Books
Insurance
Welcome

Get To Know Your Patient
Consultation

Hand Off
Consider Solutions
(Product + Service + Referrals)

Assume The Sales
Recommend Products

Accurate Entry
OneSight
Thank You

Order Management
Pick Up
Optical Expert

TOOLS + RESOURCES

Data Capture
Fill The Books

Patient Questionnaire
Intake Form

OD Hand Off
Observation

LensSimulator
SmartShopper
Lens Portfolio Guide
Contact Price Card
Promotions Card

EyeRuler2
Patient Referral

Take Action Tab
Eyewear Analysis

KPI IMPACT

Exam Growth
Fill Rate
No Show Rate

Sales
Comp Sales

Retail Capture
OD Productivity
Average \$ Patient

Multiples
Sun
Avg \$ Spec Unit/Lens
Avg \$ CL, Annual Supply

EPP
EyeRuler
Grateful Patient
Google Review

Google Review
RTFT
Reject
Dwell


**KPI
IMPACT**

- Fill Rate
- Exam Growth

Being prepared for our patient makes for a great first impression! Gathering patient details helps in diagnosing issues correctly and prescribing the right treatment or products. Preparation also ensures that the doctor and optician can tailor the exam and optical experience to the patient's needs and focus their concerns.

For the patient, knowing what to expect and what to bring can make the experience simple and enjoyable.

| | <u>Fill The Books</u> | <u>Insurance</u> | <u>Welcome</u> |
|---------|-------------------------------------------------------------------------------------|----------------------------------------------------------------------|-----------------------------------------------------------------------------|
| ACTIONS | Recall Program Confirmation Call Others On Insurance Bring Current Eyewear | Capture Medical + Vision Pre-Authorization Co-Pay + Deductible | Patient Summary Exam History Purchase History Personalize Greeting |


**TOOLS +
RESOURCES**

- Data Capture
- Pre-Appointment


**SOFT
SKILLS**

- Phone Etiquette
- Attention To Detail
- Time Management
- Warm Welcome

KPI
IMPACT

- Sales
- NPS

Learn about the patient by reviewing history and insurance, even before they arrive. When in clinic, facilitate a conversation around lifestyle, pain points, and needs. Ensure this information is travels with the patient to the doctor and optical floor.

Facilitating a conversation around lifestyle, pain points, and concerns is the first step in meeting your patients needs. Learning about your patient starts with asking the right questions!

| | <u>Get To Know Your Patient</u> | <u>Consultation</u> |
|---------|----------------------------------------------------------|-------------------------------------------------------------------------------------|
| ACTIONS | Patient Questionnaire Intake Form Purchase History | Recap Findings Medical Recommendations Product Recommendations Seek Buy In |

TOOLS +
RESOURCES

- The Patient Questionnaire
- Ciao! Lifestyle Form & Purchase History
- Legacy Systems

SOFT
SKILLS

- Active Listening
- Attention To Detail
- Be The Expert

 **KPI
IMPACT**

- Retail Capture
- OD Productivity
- Avg \$ Patient

Listen actively during patient hand-off and ensure to ask additional questions to understand the patients needs. This will guide your sales approach and what products and services to recommend today.

Active listening is a superpower in sales. When you listen with empathy, you uncover insights that will guide your sales approach and personalize your recommendations.

| | <u>Hand Off</u> | <u>Consider Solutions</u> |
|---------|-------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| ACTIONS | <p>Key Players Product Recommendations Show + Educate</p> | <p>Understand Pain Points Review Patient Questionnaire Ask Follow Up Questions</p> |

 **TOOLS +
RESOURCES**

- Lens Simulator
- In Office Demo Tools (Nuance, Meta, Transitions Gen S)
- Patient Questionnaire

 **SOFT
SKILLS**

- Personal Connection
- Seek To Understand

 **KPI
IMPACT**

- Avg \$ Spec Unit
- Avg \$ Lenses
- Multiples
- Sun
- Avg \$ CL
- Annual Supply

Lead with a single recommendation for each product to meet lifestyle or prescription needs. Assume the sale and create value. Showcase our preferred products and share the benefits with the patient.

Create value and simplify the decision process for your patient. Patients are more likely to consider preferred products once they understand the additional benefits they offer to their lifestyle!

| | <u>Assume The Sale</u> | <u>Recommend Products</u> |
|----------------|-------------------------------------------------------------------------|--------------------------------------------|
| ACTIONS | Product Selection Trusted Advisor Product Care Payment Options | Digital Tools Promotions Price Cards |

 **TOOLS +
RESOURCES**

- SmartShopper
- Lens Simulator
- In Office Demo Tools (Nuance, Meta, Transitions Gens)
- Office Staff

 **SOFT
SKILLS**

- Create Excitement
- Product Demos
- Optical Expert

 KPI
IMPACT

- EPP
- EyeRuler 2+
- Grateful Patient

Being the expert for your patient includes capturing accurate data and getting their order right! This is also a key step to ensure process are followed to avoid additional steps to correct which takes time away from your next patient. Additionally, taking a moment to genuinely thank your patient and share ways they can give back to their community.

This extra moment to review with your patient will lead to accurate sales, patient retention, and attraction of new patients.

| | <u>Accurate Entry</u> | <u>OneSight</u> | <u>Thank You</u> |
|---------|---------------------------------------------------|-----------------------------------------|------------------------------------------|
| ACTIONS | Rx + Measurements Insurance Payment Process | Grateful Patient Champions For Sight | NPS Google Review Patient Referral |

 TOOLS +
RESOURCES

- iPad
- EyeRuler 2+
- Ciao! Optical
- CRM Campaign
- Zappy

 SOFT
SKILLS

- Optical Experts
- Attention to Detail
- Overcome Objections

 **KPI
IMPACT**

- Google Review
- RTFT
- Reject
- Dwell

After payment, our job is not done! Ensure our patients know when to expect their eyewear or contact lenses and take steps to transmit or order promptly to avoid any unnecessary delays. Check status and communicate with the patient as needed until pick up is complete. Celebrate the patient's selection, product and send them on their way with a custom fit!

A key moment to complete the patient journey and deliver on our promises. When we get it wrong, take action to communicate and turn it around!

| | <u>Order Management</u> | <u>Pick Up</u> | <u>Optical Expert</u> |
|----------------|--------------------------------------------|-----------------------------------------------------------|------------------------|
| ACTIONS | Transmit Within 30 Minutes Promise Time | Present + Celebrate Set Expectations Review + Recap | EIP Rejects RTFT |

 **TOOLS +
RESOURCES**

- Order Tracker & LPA
- Order Management Guide
- Lens Simulator
- EIP & Eyewear Analysis Form

 **SOFT
SKILLS**

- Optical Expert
- Create A Lasting Impression
- Address Concerns with Solutions