

| | Exam Growth | Fill Rate % | Net Sales | Sales Goal % | Comp Sales % | Retail Capture % | Multiples % | EPP % | Avg \$ Patient | Avg \$ Spec Unit | Google Review | |
|------------|-------------|-------------|-----------|--------------|--------------|------------------|----------------|---------------|----------------|------------------|---------------|--|
| LW Results | TKR + DFR | FRT | DB + TKR | DB + TKR | DB + DFR | DB, TKR + DFR | DB, TKR + TMKR | DB, TKR + DFR | TKR + DFR | TKR + DFR | Google | |

Key business drivers and goals this week...

| | | | | | | | |
|--------------------------|----------------|-------------------|----|-------------------|----|--------------------|--|
| CE Exam/ Refraction Goal | RF | Sales Goal | FL | Retail Units Goal | FL | Google Review Goal | 4.8+  |
| CE Exams Scheduled | Count in E.H.R | Comp Sales Target | FL | Multiples Goal | FL | | |

Consultative Selling Patient Journey behavior focuses this week...

Prepare-Insurance.

Objective= 65% Retail Capture

- PCC to share with Optical insurance details daily- who's eligible and additional coverage
- Optical to know Frame Allowance and have frames ready
- Price a value pair as a back up/second need for every patient

Reporting Key:

- DB = Dashboard
- DFR = TeamVision Daily Field Report
- FL= Field Leader Provides
- FRT = Fill Rate Tool
- ODR = OD Report
- RF= New Refraction Report starting in 2026
- TKR = Toolkit > Reporting
- TMKR = TeamVision Team Member KPI Report

| | PREPARE | LEARN | LISTEN | LEAD | REVIEW | AFTER |
|------------|--|--|---|---|---|---|
| STANDARD | Fill The Books Insurance Welcome | Get To Know Your Patient Consultation | Hand Off Consider Solutions | Assume The Sales Recommend Products | Accurate Entry OneSight Thank You | Order Management Pick Up Optical Expert |
| KPI IMPACT | Exam Growth Fill Rate No Show Rate | Sales Comp Sales | Retail Capture OD Productivity Avg \$ Patient | Multiples Sun Avg \$ Spec Unit/Lens Avg \$ CL/ Annual Supply | EPP EyeRuler Grateful Patient | Google Review RTFT Dwell |

| Key Communications | Training & Development | Operational Tasks |
|---|---|--|
| <p>Celebrate 2025 results and Key Players</p> <ul style="list-style-type: none"> • 2 million in sales +250,000 Exams • Techs- All cross trained to scribe! • Amanda 20% multiples • Karen 80% Varilux® lenses | <ul style="list-style-type: none"> • PCC's- Review deductibles with all patients since it's a new year • Opticians- Review Katie's new insurance guide and videos • Clean up To-Do Lists in Leonardo | <p>Remerchandise after peak business</p> |

Mid Week Trends, Celebrations, and Consultative Selling behavior refocus....

| Exam Growth (+/-) | Refractions WTD | Fill Rate % | NCNS % | Net Sales | Sales Goal % | Comp Sales % | Retail Capture % | Multiples % | EPP % | Avg \$ Patient | Avg \$ Spec Unit |
|--------------------|-----------------|-------------|--------|-----------|--------------|--------------|------------------|-------------|-------|----------------|------------------|
| WTD: 35 Goal 60 | 30 | 90% | 2% | \$15,460 | \$30,000 | \$25,000 | 66% | 14% | 65% | \$300 | \$306 |

Prepare-Insurance.

- **PCC to share with Optical insurance details daily- who's eligible and additional coverage-** Sally doing a great job of informing Karen and Amanda. Best Practice- to share in AM before we open and again after lunch so it's fresh in our minds.
- **Optical to know Frame Allowance and have frames ready-** This has helped us convert. Challenged the opticians to add sun in the trays along with clear. This will help with multiples.
- **Price a value pair as a back up/second need for every patient-** leverage this for our CL wearers. Got two patients to purchase!!!

Objective= 65% Retail Capture