

	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

Celebrate 2025 results and Key Players

- 2 million in sales +250,000 Exams
- Techs- All cross trained to scribe!
- Amanda 20% multiples
- Karen 80% Varilux® lenses

Training & Development

- 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

Operational Tasks

Remerchandise after peak business

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

Exam Growth (+/-)	Refractions WTD	Fill Rate %	NCNS %
WTD: 35 Goal 60	30	90%	2%

Net Sales	Sales Goal %	Comp Sales %	Retail Capture %	Multiples %	EPP %	Avg \$ Patient	Avg \$ Spec Unit
\$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