

LEONARDO

# Practice Manager Learner's Guide (Conversion)

2024 Edition

 **TeamVision**  
Eye care, together.

# Table of Contents

1

## Introduction

Welcome and objectives  
How to use this guide

2

## Onboarding

Day by day Leonardo  
lessons and on-the-job  
training to complete

3

## Continuous Learning & Survey

30, 60, and 90 day  
recommended learnings  
Feedback survey



LEONARDO





# Welcome and Objectives



Welcome to our team! TeamVision is here to help you and your practice be successful. Our Mission is to create a community with a primary focus on promoting and guaranteeing a premium and professional eye care experience in optometry. The patient experience is at the center of every decision we make, and you have a critical role in this!



## Learning Objectives

Having completed their onboarding, new joiners at EssilorLuxottica North America will support the Group mission by being able to:



- Model the values, mission and characteristics of EssilorLuxottica & TeamVision.
- Explain the optimal patient journey and accompanying behaviors to drive success.
- Summarize goals and expectations for their role and identify actions to drive results.
- Discover available resources to aid in their development beyond onboarding.
- Engage with key business partners to set short-, mid-, and long-term goals to support their ongoing growth and development.



# Using This Guide

The learner guide provides a day-by-day breakdown of recommended focus areas for your onboarding period. Use this guide side by side with your mentor or hiring manager to stay on track and share your learning progress throughout onboarding. Complete on-the-job training activities with your mentor and use the knowledge check section to assess your confidence and understanding of what you just learned.

## Example

<p>Details and timing for each type of learning</p>	<div><h3>Onboarding Shift One</h3><p><b>Focus For The Day</b> Welcome to TeamVision! Today you will get to know the team, explore the site, and begin learning in Leonardo. Take notes, ask questions and be ready to practice!</p><p><b>Leonardo, 45m</b> Complete the following sections in Welcome To TeamVision:</p><ul style="list-style-type: none"><li>Welcome<ul style="list-style-type: none"><li>Optical Knowledge</li></ul></li></ul><p><b>On the Job Training</b></p><ul style="list-style-type: none"><li>Complete an office tour</li><li>Meet the team (including Doctors)</li><li>Learn Kronos basics (clock in/out, request time off, view schedule)</li><li>Ensure access to all appropriate systems</li><li>Get an eye exam and/or shadow interactions with patients</li><li>View the Patient and Customer Journey videos via the Ciao! Optical Toolkit</li></ul><p><b>Daily Debrief</b> At the end of the day, review what you learned. What questions do you still have?</p><p> LEONARDO</p><p>OPTICAL LEARNER'S GUIDE 5</p></div>	<p>Discussion prompts, questions, and activities to check for comprehension</p>
---	--	---

# Onboarding Shift One



## Focus For The Day

Welcome to TeamVision! Today you will get to know the team, explore the site, and begin learning in Leonardo. Take notes, ask questions and be ready to practice!

### Leonardo, 1h 5m

Complete the following sections in Welcome To TeamVision:

- Welcome
  - Welcome to EssilorLuxottica
  - Optical Knowledge

### Knowledge Check

Practice navigating Leonardo and find a lesson outside of your onboarding that interests you.

Review Fundamentals of Optics.

Understand your practice's culture, values, and goals.

### On the Job Training

- Confirm systems access on Dell side (Insurance portals, E.H.R., Legacy systems, etc.)
- Learn Kronos basics (clock in/out, request time off, view schedule)
- Spend time in Toolkit familiarizing yourself with the Apps available
- Identify important applications most related to your job function
- Practice toggling between your Dell computer & Ciao! computer
- View the Patient and Customer Journey videos via the Ciao! Optical Toolkit

### Knowledge Check

Practice accessing to key systems.

What Ciao Toolkit applications require unique credentials (vs. location) to access?

When do you need to post your schedule by?

Locate your resource for Payroll Transmission for the end of the week.

## Daily Debrief

At the end of the day, review what you learned. What questions do you still have?



# Onboarding Shift Two



## Focus For The Day

Welcome back! Today we will focus on the Ciao Toolkit and its many tools and resources. We will also look more in-depth at the patient and customer journey.

### Leonardo, 1h 10m

Complete the following section in Welcome To TeamVision:

- Welcome
  - Ophthalmic Solutions
  - Eye Care Brands
    - EyeZen Lessons

### On the Job Training

- Spend time observing and supporting your team through:
  - Scheduling
  - Check In/out
  - The Patient Handoff
  - Consultative Selling Behaviors
  - Lens Simulator/Eye-Ruler 2
  - Ciao! Optical Entry (Exams, Contacts, Eyewear)
  - Tender & After the Sale

### Daily Debrief

What are you most excited about? How do you think you can build the practice and make a positive mark?

### Knowledge Check

Do Eyezen lenses come with Blue Light Filters?

Who might benefit from an Eyezen + Lens?

Describe the benefits of both the Eyezen + lens and Eyezen Kids

How might you uncover your teams' beliefs around Eyezen products?

### Knowledge Check

What Ciao Toolkit applications require unique credentials (vs. location) to access?

Discuss patient flow observations with your mentor/Field Leader. What is your role in the patient and customer journey?

Review how TeamVision Email is accessed.

Review the TeamVision Operational calendar (shared in email from TVOps).

Celebrate a team member for a job well done!



# Onboarding Shift Three



## Focus For The Day

Build upon your optical learning from yesterday by learning about our lens and vision solutions. Understand how you can influence the practice as a Leader in the location.

### Leonardo, 1h

Complete the following section in Welcome To TeamVision Optical:

- Welcome
  - Eye Care Brands
    - Crizal
    - Varilux

#### Knowledge Check

Describe the features and benefits of the Crizal coatings.

Describe the features and benefits of Varilux lenses.

Role play sharing the features and benefits of each product as you would with a customer (bonus if you use Lens Simulator).

### On the Job Training

- Continue job shadowing
- Confirm the Check Out process is going well and confirm all data transferred to Ciao! Optical
- Locate the Lens Education folder in the Toolkit & review documents
- Review the Frames Brands in your practice; Find your favorites
- Observe opening and/or closing procedures

#### Knowledge Check

With your mentor, demonstrate:

- What you've learned in the E.H.R
- Your favorite frames
- How to search an Auto-Calculations plans in Ciao! Optical

Celebrate a team member based on your observations!

## Daily Debrief

How comfortable are you discussing our various lens technologies?



# Onboarding Shift Four



## Focus For The Day

Today you will continue to learn about our Patient Journey. Continue to look for every opportunity to be hands on with the tools and applications used in your location.

### Leonardo, 1h 15m

Complete the following section in Welcome To TeamVision:

- Patient Journey
  - Patient Arrival
  - Eye Exam
  - Fitting & Measurements

### On the Job Training

- Using Toolkit Documents, observe Ciao! Optical Entry;
  - Patient Demographics
  - Entering Exam services
  - Contacts, and Materials
  - Apply Insurance
  - Tender
- Using Toolkit documents, observe and practice taking digital measurements with Eye-Ruler 2
- Review your Insurance Guide

### Knowledge Check

Describe the process of a patient check-in.

What are the key steps to a successful transition to the Eye Exam?

Demonstrate Eye-Ruler 2.

Explain the benefits of Eye-Ruler 2.

How might you coach a team member to use Eye-Ruler 2 with a patient?

### Knowledge Check

Why is it important to accurately enter patient information?

What insurance does your site see the most?

With your mentor, demonstrate

- The benefits of digital measurements.
- How to search Insurance Plans in Ciao!
  - Medical
  - Routine Vision

## Daily Debrief

How do you feel navigating the iPad and desktop in front of a patient?





# Onboarding Shift Five



## Focus For The Day

Today will be centered around selling tools in the optical dispensary and wrapping up your E.H.R. Training.

### Leonardo, 15m

Complete the following section in Welcome To TeamVision:

- Patient Journey
  - Selling Tools

### Knowledge Check

Demonstrate the Lens Material Section on Lens Simulator.

Demonstrate the Lens Technology Section on Lens Simulator.

Demonstrate the Lens Enhancement and Sun Rx on Lens Simulator.

How will you coach your employees to use the Lens Simulator?

### On the Job Training

- Continue to observe and support your team in new systems
- Observe Lens Simulator presentation with opticians
- Review EPP folder in Toolkit
- Begin weekly Payroll preparation in Kronos Timekeeping
- Review Reporting in Toolkit
- Schedule time with your post-support team to debrief the week and gameplan for next week

### Knowledge Check

Why is it important for team members to confirm their timecards daily?

What are the terms of the TeamVision Eyewear Protection Program?

What is at risk if we do not attach a provider to a wellness/frame transaction?

How might you coach a team member if they are having a hard time with EPP or do not attach a provider to a transaction?

## Daily Debrief

Review what you have learned. What questions do you still have? What do you feel you need more time on?



# Onboarding Shift Six



## Focus For The Day

Today we will continue to explore the functions of Ciao! Optical and role of insurance in your site.

### Leonardo, 1h 5m

Complete the following section in Welcome To Team Vision:

- Life In The Practice
  - Compliance
    - HIPAA
    - Medicare/Medicaid FWA
  - The 3R's of Shoplifting

### Knowledge Check

What is HIPPA? Why is it important?  
What is Medicare/Medicaid FWA?  
Why is it important to be aware of Medicare/Medicaid FWA?  
Explain the 3R's of shoplifting.  
Review the shoplifting policy.

### On the Job Training

- Get confident with the Patient Journey thus far (Scheduling, prepping for patient arrival, check in, check out, Transition to the OD, Enter demographics & services into Ciao! Optical)
- Review Pricing and Promotions in Ciao! Toolkit
  - Practice apply discounts to cash pay transactions in Ciao! & XStore

### Knowledge Check

What is an Auto Fire discount code?  
Search and select insurance plans in Ciao! Optical.  
Demonstrate how to complete insurance demographic information.  
Enter plan pays and discounts in Ciao!  
Review Xstore and navigate to/from Ciao! Optical active orders.  
Determine receipt printing options.  
Review what prints from Ciao! Optical.

## Daily Debrief

Are there any policies and procedures you are unsure about?



# Onboarding Shift Seven



## Focus For The Day

Welcome back! Today we will take a deep dive into Ciao! Optical as well as review important Key Performance Indicators (KPI's) for your site.

### Leonardo, 1h

Complete the following section in Welcome To Team Vision:

- Life In The Practice
  - Compliance
    - Workplace Harassment
- What's Next

#### Knowledge Check

What is the largest single revenue source in your site?

What is capture rate?

How can you contribute to performance metrics in your site?

How will you continue to make learning on Leonardo a best practice?

### On the Job Training

- Review your site KPIs, sales goals and objectives with your mentor
- Review key Reports found in Ciao! Toolkit
- Enter a frame-only order in Ciao! Optical and attach a provider
- Enter a complete eyeglass pair in Ciao! Optical and apply insurance
  - Apply Auto-Calculation Plan

#### Knowledge Check

Celebrate a top-performing team member.

How do you think you can positively impact office goals & objectives?

Use the Toolkit, your mentor to learn how to enter orders in Ciao Optical.

Continue to learn how to do Bill Actual plans.

What do you enter into the plan pay amounts for covered in-full items?

Review how to process Eyezen Lenses.

## Daily Debrief

Talk to your mentor about your experience so far.



# Onboarding Shift Eight



## Focus For The Day

Today is all about Contact lenses!

### On the Job Training

- Review the contact lens handbook found in Toolkit
- Review the contact lens quick guide found in Toolkit
- Review the contact lens price card in Toolkit
- Practice selling contact lenses in Ciao! Optical
  - Practice entering CL Rx's
  - Price out various lens options
  - Review which lenses are specialty lenses
  - Apply instant savings
  - Attach insurance to the order
  - Apply Express shipping fees in Xstore
- Understand your practice's process for ordering specialty contact lenses
- Locate your office's account numbers

### Knowledge Check

What Contact lenses are most prescribed at your site?

What is the Contact lens instant rebate?

What are considered specialty contact lenses at your site?

What is the process for ordering specialty lenses at your site?

How might you coach team members to increase contact lens revenue?

## Daily Debrief

What is your role in ensuring our contact lens patients order a supply from TeamVision?





# Onboarding Shift Nine



## Focus For The Day

Today you will learn about *After the Sale: Lab Processing Application (LPA)*.

### On the Job Training

- Review the Order Management Guide in Toolkit
- Learn how to transmit orders in LPA
  - Insurance vs. RxO
- Review and demonstrate the shipping process to RxO
- Confirm transmission of tendered orders and deletion of staged orders
- Review RXO Escalation process
- Observe Order Completion in LPA
- Review Order Tracker best practices with your mentor or Practice Manager
  - Learn how to see which lab to ship your order
  - Find Order Status
  - Learn how to leverage the Take Action page(s)
  - How can you communicate with patients?

### Knowledge Check

Why is shipping to the lab on the same day so important?

Demonstrate the Escalation process.

Will your patients automatically get text or email notifications?

Demonstrate to your mentor or Practice Manager everything you've learned about Order Tracker.

Explain how you will bring the Patient Experience to life every day in the practice.

Lab Locations: Touch base with your Lab Leader to understand any site-specific processes.

## Daily Debrief

Tomorrow is your last official day of onboarding! Talk about your experience so far.



# Onboarding Shift Ten



## Focus For The Day

Congratulations! Today is your last official day of onboarding. By now you have the foundational knowledge needed to be successful in your role.

### On the Job Training

- Continue to learn and practice the patient journey
- Continue to use the documents in the Toolkit (Training Checklists & Guides) to gain confidence with all systems
- Learn any practice-specific processes and systems
- Get comfortable selling on the iPad
- Review your KPIs, sales goals, and objectives with your manager
- Take the time to get to know your team members
- Complete the onboarding feedback survey on MyPersonalDesk

### Knowledge Check

Complete full interactions with patients and ask for feedback from your team and manager.

Develop a plan with your manager to complete monthly assigned learning content on Leonardo.

Think back on your onboarding journey, is there anything you would like to revisit with your mentor?

Where can you find and keep track of your goals and performance?

- What are your current strengths and opportunities, how will you address?

- How can you use Leonardo to develop your team?

## Daily Debrief

Time to celebrate! As you complete your onboarding, continue to check in with your manager for feedback and development.



# Continuous Learning & Survey



Continuous learning is important to maintain and enhance your knowledge and competencies to expand your skill set and future opportunities. Ongoing development is critical for everyone to reach their full potential. The following lessons should be completed between patients, as business allows.

## Leonardo Enrichment Onboarding Path

Upon completion of your Essentials Onboarding Learning Path on Leonardo, you will continue your Onboarding Journey with the Enrichment Onboarding Path directly on Leonardo.

## Monthly Assigned Lessons

Regularly check your Leonardo “To-Do” list and the monthly communication to find the mandatory Leonardo lessons and virtual classrooms for each month.

## Within 30 Days

Complete *Diversity in the Workplace* and TeamVision compliance courses on Leonardo.

## Within 60 Days

Complete all compliance lessons in the “To-Do” list.

## Within 90 Days

Complete the Oakley Expert and Ray-Ban Expert Programs.

Explore additional eyewear content on Leonardo

- Select “Brands” from the top menu, then select “Eyewear Brands”

## Feedback Survey

At the completion of your onboarding period, you will receive a four-question feedback survey about your onboarding experience in MyPersonalDesk. Log into MyPersonalDesk, click on your Inbox, and complete the survey within 30 days.



© 2024 EssilorLuxottica Group. All images and text in this tool are protected by copyright laws and are for internal use only. They may not be used or reproduced in any form or manner without the prior written permission of EssilorLuxottica Group, or in the case of third-party materials, the owner of that content.



LEONARDO