

Course Outline for COPE accreditation

Submission Date: August 15, 2022

Venues: Vision Expo West (September 2022); Heart of America Eye Care Congress (Feb 2023)

Title: Boots on the Ground Marketing

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Description (35 words or less): SEO and Social Media only get you so far. How do you connect with your community? Attract new customers and create loyal patient advocates through effective outreach events, speaking circuits, volunteerism, and strategic local alliances.

Objective: Learn how to throw a six-digit frame show, plan an efficient Senior Center speaking circuit, host an intimate practice tour for select health care providers, and other customer service tactics for attracting and retaining high-quality patients.

Course Category: Practice Management

Course Format: Live CE

Hours: 1

Disclosure of financial/proprietary interests: Dr. Julie Helmus has no relevant financial relationships to disclose. The content and format of this course is presented without commercial bias and does not claim superiority of any commercial product or service.

PERSONAL INTRO:

- Who I Am: second-gen OD in VCP-heavy CA
 - Know thyself and market it!
 - Family Business
 - Local Business
 - Woman-Owned Business
 - Independent Business

DIFFERENT TYPES OF MARKETING:

- Specific marketing is more effective and less expensive
- Today:
 - Relationships
 - Word-of-mouth
 - Events
 - Reputation Management
 - Internal Marketing with employees
 - Connections and connecting
 - Customer service
- Not this time:
 - Search Engine Optimization
 - Targeted Google Ads
 - Social Media: Facebook, Instagram, Nextdoor, YouTube
 - Advertising

- Accepting Insurance plans is one type of marketing strategy = VERY EXPENSIVE d/t write-offs

QUESTIONS TO ASK YOURSELF:

- What's your marketing budget?
 - Usually 3%
 - Consider line item for "patient retention" aka damage control
- Who is your target audience?
 - Women
 - More frequent health care consumers
 - Frames = Fashion
 - *Often* the manager of the family schedule
 - *Often* more connected in the community
 - *Often* more likely to talk
- Who is most likely to buy from you?
 - Someone who has purchased from you before
 - Email blasts, blogs
- Who is your competition?
 - Shopping Centers: Costco, Sears, JC Penny Optical
 - Stanton, America's Best
 - EssiLux: Lenscrafters, Target, Pearle Vision, Sunglass Hut, Spectacle Hut, and more
 - VSP: Vision Works, VSP Ventures
 - Other private practices
 - Ophthalmology
 - Avoid discounts: avoid the race to the bottom
- What's your ROI for various marketing campaigns?
 - Hard to measure but not impossible
 - "How did you hear about us?"

WHAT'S YOUR "WHY"?

- Author Simon Sinek
- Beating the competition vs beating yourself? SELF
- Know what game you're playing: Finite vs Infinite game theory

EVENTS:

- Health Fair: sponsor and participant
- Seasonal Frame Shows
 - Springtime in Paris
 - Roaring Twenties
 - Tropic Like It's Hot
- Singles Events
- Art night
- Host Ophthalmologists
- Host PCPs

PUBLIC SPEAKING:

- Senior Centers
- Rotary, Lions, Kiwanis
- Parent-Teacher Association (PTA)
 - "My child has never had an eye exam, but they're checked every year at school and by the pediatrician."
 - Myopia management

VOLUNTERRISM:

- Vision Screenings
- Public speaking (above)
- Women in Optometry/Divas
- Local groups and organizations:
 - Downtown Davis Business Association
 - Davis Parent University
 - Women in Business

STRATEGIC (LOCAL) ALLIANCES:

- Identify big employers in the area:
 - Know their eye care benefits: example safety glasses
 - Get to know the HR department
- Identify local businesses that share your clientele: hairdressers, cosmetic dermatologists, realtors, etc.
 - Goody bags, gift boxes, cookies, etc.

SPONSORSHIPS/DONATIONS:

- Sports Teams
- Schools
- Causes

EXAM SUMMARIES:

- An excellent opportunity
 - Ophthalmologists
 - PCPs
 - Endocrinologists
 - Pediatricians
 - Physical Therapists

IN-HOUSE CLUBS:

- Loyalty Club: 10-, 20-, and 30-Plus Years with the Practice
- BFF Club (Best Friends and Families)

OLD SCHOOL:

- Print:
 - Postcards to target patient groups
 - "Thank You" notes
- Phone:
 - "Thank You" calls to patients who spend more than \$1,000
 - Call patients who haven't been in the office in 2 years

INTERNAL MARKETING: EMPLOYEES

- Representatives and spokespeople
- Part of your Brand
- Serve your customers or serve your staff? BOTH

OUTSIDE-THE-BOX IDEAS:

- Guerilla Marketing
- Car windshield washing

REVIEWS:

- Inescapable: Yelp, Google, Facebook, Indeed
- You can't please them all, but you can (and must) respond to them all
 - Average 4.7 reviews feel more real
 - All 5 stars doesn't feel real, suspicious
- Why you must respond:
 - Social proof: a lot of people reading the reviews are ready to side with the business, assuming the business responds correctly
 - For future patients and future employees
- How to respond to bad reviews:
 - Begin with gratitude: "thank you for this feedback"
 - Empathize: "that sounds frustrating, I would be upset too"
 - Take the high road
 - Acknowledge and apologize using their own words
 - Offer a solution: "I would love to help resolve this situation, we look forward to making this right."
 - Implement the solution

CUSTOMER SERVICE:

- According to the American Customer Satisfaction Index (ACSI): customer satisfaction is way down, a 17-year low
- 76% of customers will quit going to a business based on one bad experience
- But if we successfully resolve complaints, customer loyalty skyrockets, above and beyond the normal loyalty projection

- What is the #1 Complaint?
 - Unmet expectations!
 - Set clear expectations: what, when, why
 - “The more you explain, the less they complain”
- Common Complaints at OD Offices:
 - Front desk staff
 - Unsuccessful Adjustments
 - “Undisclosed” fees: Optos, CL fits
 - Glasses take too long
- Common complaints from OMD Offices:
 - Like a factory, I’m just a number
 - Long appointment times
 - Poor bedside manner

DELIVERING EXCELLENT CUSTOMER SERVICE:

- Not just an eye exam; it’s a “Patient Experience”
- Our Job:
 1. Meet their needs
 2. Remove the effort (make it easy!)
 3. Add delight
- Delight:
 - Goal: build engagement and loyalty
 - People remember moments, not days
 - The first act of love is to listen
 - Patient’s throw the bait, so grab it! You’re creating a moment, which creates a memory, which makes them talk about you
- Clinic Culture:
 - People don’t care how much you know until they know how much you care
 - “When you tell them why, they are more likely to comply”
- Memorable Moments:
 - Arrivals
 - Transitions
 - Peaks
 - Valleys: must be resolved before the end!
 - Endings
 - End with a positive good-bye
 - End must be as good as the start
 - The next steps need to be clear
- Take Away:
 - How to have more fun: (1) Playfulness (2) Connection (3) Flow
 - Great service is a gift

THE ASK

- Ask for referrals and reviews
 - Not just anybody
 - Internal reviews: 4 hours after the appointment
- Cultivate "Patient Advocates"

CONCLUSION

- Thank you!
- Please complete your reviews
- Dr.julie.helmus@helmusoptometry.com

REFERENCES:

- Barbara Khozam, Customer Service Speaker
- Simon Sinek, "Start with Why"
- Catherine Price, "Why Having Fun is the Secret to a Healthier Life, TED TALK:
<https://www.youtube.com/watch?v=iMBJrvEwv8s>
- [Business Wire ACSI](#)