

THE PATIENT TRANSITION

The easiest and most cost-effective way to sell to 5% more of your patients: improve the patient transition in your office

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What is the patient transition? Sometimes known as the patient handoff, it's the transition of the patient and their needs from the doctor to the advisors in your optical practice.

By advisors, I refer to your team members in all areas of your business, not just to the dispensers.

Other areas to professionally transition the patient and their needs include:

- **CL Fitters**
- **Front Desk**
- **Dry Eye Technicians**
- **Pretest Team**
- **Special Testing**

WHY IS TRANSITION IMPORTANT?

First, it increases sales. Second, it helps create an experience where patients trust us. And third, it keeps their business in-house.

The best indicator that patients are happy with your service is when they purchase. When you transition the patient properly, it builds credibility, loyalty and in turn, referrals. When patients feel cared for, they tell others; statistics show that 35% of new patients come from existing patient referrals – truly the best ROI marketing.

I can share a couple of examples where we did the training and supported the implementation.

EXAMPLE 1

This was a large office that had already done the transition in the exam room, so we focused on what the recommendations sounded like and extending the transitioning to all advisors. We followed the results for two months. The conversion rate increased by 4.7% (conversion calculation: total eye-wear sold/total eye exams).

EXAMPLE 2

This was a smaller office that did not do the transition in the exam lane, so that was the focus. We again followed the results for two months and saw an increase in conversion of 6.8%.

WHY IS IT SO EFFECTIVE?

Moments of maximum impact (MMI) are moments along the decision-making path when shoppers are open to receiving information that can help them decide what to purchase and where to purchase.

Marketing experts in our field agree that this moment is in the exam lane when the OD makes recommendations.

So how do we accomplish this?

You could consider the following steps to implement the new behaviors. First, explain the “why” and train all staff on the best practices. The transition takes place in the privacy of the exam lane, then the advisor comes to the exam lane when paged by the doctor.

From there, we follow the template below:

- 1 INTRODUCTION**
Name of advisor, their role, why you chose them.
- 2 SHARE RELEVANT INFORMATION**
Recap the exam results.
- 3 SHARE WHAT YOU ARE PRESCRIBING OR RECOMMENDING**
Share patient needs you have identified; it is their decision whether they want to purchase or not.
- 4 THANK THEM**
It's common courtesy, and then this part of the process is over.

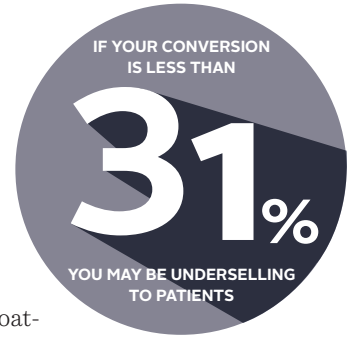
EXPERT TIP

Whatever you do, avoid telling patients they do not need new eyewear because their prescription did not change. There are so many reasons for new eyewear: task lens needs, special coatings, damaged lenses, outdated frames, etc. Our job is to educate patients and let them decide if they would like new eyewear or not.

CONSIDER THIS

31% of patients come in because they want new glasses. If your conversion is less than 31%, you may be underselling to patients. If this is the case, I am happy to help. **OP**

Nancy Dewald is a business development professional, workshop facilitator and optical industry veteran. She is CEO and founder of Lead Up Training and Consulting, which specializes in identifying business gaps, implementing solutions and developing leaders



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