

LICENSED OPTICIAN PATIENT RELATIONS COMMUNICATIONS TOOLKIT

BROUGHT TO YOU BY



COLLEGE of OPTICIANS
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THE IMPORTANCE OF PATIENT RELATIONS

THE NEED

Patient Relations has always been the key to a Licensed Optician's success as a healthcare professional and provider. Now, more than ever, there is a need for Licensed Opticians – like you – to speak up and showcase your role in the industry. This manual will provide you with the recommended approach when working with your patients.

WHY IS IT IMPORTANT FOR LICENSED OPTICIANS TO IMPROVE THEIR PATIENT RELATIONS?

It is inherently important for the public to be aware of having the proper visual tools. Patient Relations builds confidence in Licensed Opticians as a regulated health care profession and ensures that you develop life-long relationships with your patients.

By highlighting and improving your patient relations, it will help distinguish Licensed Opticians and elevate the entire profession.

THE POSSIBLE RESULTS

If Licensed Opticians begin to improve their patient relations, it will help reinforce the greater brand as well as spread eye health education across Canada.

By improving your patient relations, you not only help yourself, but you also help your shop as well as the greater Licensed Optician brand. Ultimately, you help your patients associate the brand with knowledge and professionalism.

THE CONTEXT

This document isn't meant to be prescriptive or introduce new rules, rather it is a toolkit that you can utilize. It is designed to give you ammunition to address difficult discussions and to help patients understand what an Licensed Optician's job entails.

Following our recommended script doesn't necessarily solve every scenario, however, it can help by providing a possible approach. Remember that you have colleagues or the College to help problem solve and find the best course of action for every unique scenario.



HOW TO DIFFERENTIATE YOURSELF AS A LICENSED OPTICIAN - PRACTICES

YOU ARE A HEALTHCARE PROFESSIONAL FIRST

Patient Relations has always been the key to a Licensed Optician's success as a healthcare professional and provider. Now, more than ever, there is a need for Licensed Opticians – like you – to speak up and showcase your role in the industry. This manual will provide you with the recommended approach when working with your patients.

AWARENESS OF PROFESSIONAL BOUNDARIES

It is inherently important for the public to be aware of

having the proper visual tools. Furthermore, with the advent of unregulated online options, it is important for the public to be educated in the decisions they make when purchasing eyewear.

Due to past regulations, there was less of a need to educate the public on the importance of regulated eyewear, however, now that there are online options, it is important that we help educate the public on the importance of eye health and the role Licensed Opticians play in that process.

BUILDING TRUST

If Licensed Opticians begin to improve their patient relations, it will help reinforce the greater brand as well as

spread eye health education across Canada.

By improving your patient relations, you not only help yourself, but you also help your shop as well as the greater Licensed Optician brand. Ultimately, you help your patients associate the brand with knowledge and professionalism. This also builds confidence in regulated professionals and will help gain long-term patients.

KNOWLEDGE IS POWER – SHARE YOUR KNOWLEDGE AND MAXIMIZE YOUR INFLUENCE

How to share your knowledge

Be sure to frequently introduce yourself as a Licensed Optician. After mentioning this, share information on the benefits of their choices. For example, you can outline the pros and cons of each type of lens. Learn more about your patients and see what their lifestyles needs are and how your service and knowledge can accommodate their needs.

Educate yourself

Ensure that you are up to date with the latest education in your field. Go above and beyond the curriculum to expand your expertise. Specialize in an area where you can be the local or city expert on a specific need – this

will help create a patient stream coming to you. Discover the needs of your patients and continue to build your value within their lives by consistently finding ways to improve their ocular health.

One Licensed Optician found themselves bringing in customers by sharing the fact that they had expert knowledge in their city.

DEFINE YOURSELF AS A LICENSED OPTICIAN

When someone asks you what you do or when you're explaining to patients what you do, ensure you use consistent terminology so that your patients aren't confused by the role of Licensed Opticians and how they differentiate from the other O's. We suggest utilizing the following sentence to describe Licensed Opticians:

Licensed Opticians are highly trained healthcare professionals who translate your prescription and lifestyle needs into proper eyewear to address your vision care needs.

HOW TO DIFFERENTIATE YOURSELF AS A LICENCED OPTICIAN - GENERAL SCRIPTS

HOW TO: WORKING WITH PATIENTS

Position Yourself as the Expert

Display confidence but don't boast or be forceful. Suggest the best decisions based on the fact that you're a Licensed Optician. Always provide options and assert your opinion. Whether or not your patients take your opinion is irrelevant, it's that you've done your due diligence to help them and provide them with the right information to make the choice for themselves. More often than not, if the decision is wrong, make it easy for them to come back and admit it. Be open to the possibility and don't play the "I told you so" card.

Inject your expertise

Provide your thoughts and advice to your patients.

Sometimes individuals believe it's only important to share when asked – but most of your patients don't know to ask. It's important that you provide the information even if it is not asked, as it is your responsibility to make sure they have all the information they need in order to make the most educated decision for their eye health. If they choose not to follow your suggestions, it is their choice, however, it is still your role as a Licensed Optician to provide them with the information they need.

Patient Service is Essential

In addition to all the information you are providing, one the most important aspects of being a Licensed Optician is patient care. The face-to-face relationship you provide helps solidify the relationship and it provides comfort for them to know the person who is taking care of their eye

health.

Intent is to ensure their eye health is taken care of

The general approach and mindset a Licensed Optician should have as they approach patients is to provide suggestions and expertise. For example, a doctor would prescribe medication based on their expertise, but if the patient refuses to take the suggestion, it is all that can be done. However, if a doctor doesn't provide enough information nor their suggested prescription, then it is the fault of the doctor. The same goes for Licensed Opticians and their patients – your role is to ensure that your patients leave with the correct information so that they are aware of all their choices. Your patients should never return, exclaiming that they were unaware of their options.

ESTABLISHING YOURSELF AS A LICENSED OPTICIAN

It is extremely important that your patients know that you are a Licensed Optician and not an Optometrist or Ophthalmologist. The reason for this is because a majority of the public does not know the difference between the O's, and many will assume you're an Optometrist. Because of this, it is important to establish yourself as a Licensed Optician. It may feel odd in conversation to say do this, especially if it is your first

time, however, it is encouraged that you to establish this in conversation as it will not only help you, but also help reinforce the value of your profession. The more you present yourself as an expert and establish that you are a Licensed Optician, the more likely you are to convert them into long-term patients.

“Good morning/afternoon. I'm the in-house Licensed Optician, please feel free to ask me any questions about your prescription or suitable eyewear”

“Hi I'm _____, I'm the Licensed Optician on staff – if you have any questions around suitable eyewear for your lifestyle needs, or your prescription, please let me know.”

“If you don't mind me asking, what are your regular day-to-day activities? As a Licensed Optician, our job is to indicate what eyewear is most suitable for your lifestyle needs and translating those into suggestions for your eyewear. Having said that, I would highly recommend _____ because...”

“Do you mind if I have a look at your

prescription? I'm a Licensed Optician so I can help you translate your prescription and recommend the best options for you and your lifestyle"

"I'm currently adjusting the frames to fit your face. Because you have a ____ shape face and your prescription indicates _____, I have to adjust this to sit on the right part of your _____. I need to ensure that we are careful with this material as it can easily break. "

"Do you know what your prescription means? It means _____"

"Are you experiencing any vision problems? Eye strain, headaches, dryness, fatigue? You can address those with the right type of glasses. As Licensed Optician, I would recommend _____"

If you don't have a chance to define what a Licensed Optician is during your visit, make sure you give them a brochure with their purchase – whether it's that day with their glasses or when they pick up their prescription glasses later on.

TACKLING ONLINE PATIENTS

How to speak with them and convert them

It is important that you see these as opportunities for converting more patients.

Accept everyone and view them as potential Licensed Optician advocates. When an individual comes in with a pair of glasses that are clearly bought online, accept the challenge to fix what is needed and kindly explain to them the disclaimer in fixing their glasses. Do not condemn them or make them feel bad for their purchase. Some Licensed Opticians will decide to charge a nominal fee – which is fine. As you are looking at their eyewear, explain why the material or the lens may not be proper. The more specific you are with that specific pair's failure to meet standards, the more likely the individual will understand why it is important to have a healthcare professional be the one to review their glasses. Many are unaware that online retailers do not have Licensed Opticians or what role Licensed Opticians play in general. This is an opportunity to educate them on that aspect as well. Sentences like "Did you know online retailers are not regulated by Licensed Opticians? Do you know why that matters? It matters because Licensed Opticians are trained professionals that have the responsibility to accurately translate your prescription and have it personally fit to your face and personal needs." That

one conversation will help educate your audience immediately and possibly convert them.

We had one Licensed Optician explain what they were doing while fixing glasses and cutting lenses. She explained that even though her actions may have seemed simple or mundane to herself, she would explain the thought process behind how she was fixing the glasses or cutting lenses. What is simple to you is not necessarily simple to the average individual who is not educated in your profession. Explain your concerns and thoughts on various parts including the equipment itself (screws, frame, lens), the placement on their face, and the materials used to help address their needs. In the end, the optician was able to convert the patient into an advocate of the profession.

It is really important that you guide them through your thought process so that they understand what it is they're missing out on when they go online. When you're speaking to pharmacists, or when buying running shoes, televisions, cars, etc. you'll notice how educating customers will actually generate more of an understanding. For example, when buying running shoes, there are different types that support lateral movement versus forward movement. The life of your shoes will change depending on if you have the correct arches too. There are, surprisingly, a lot of factors to consider, and the same can be said about purchasing eyewear.



Unfortunately, a lot of individuals may not see eyeglasses or contact lenses as complicated health devices. Some might not even know this information exists, and this is where you can educate them on it.

The Licensed Opticians role is to educate the public on why it's important to pay more attention to your eye health and what each patient should look for to protect themselves.

Why you shouldn't refuse an online purchaser, and how to refuse one if you must.

This is often a difficult decision to make. As mentioned above, every individual – even an online purchaser – represents an opportunity to educate. Online purchasers

might not even have all the information to make an informed decision. Refusal to help these individuals could create shame, anger or embarrassment effectively guaranteeing that they will never return. Even though this may be a matter of principle, sometimes it is better to take the high road and ensure that you fulfill your role as a Licensed Optician and do your due diligence to help as many people as possible.

If you must choose to refuse to help a patient, this may also be an opportunity to educate them without shaming or embarrassing them.

Here is an example of what you can say:

“Unfortunately we cannot work with online purchases as it is a liability on our end. Often, issues arise such as _____ and _____ that make it difficult for us to resolve these problems without being liable. However, we would be more than happy to find a more suitable product for you in the future, and we can ensure you have the proper eyewear based on accurate translation of your prescription and lifestyle needs. Apologies again, I hope you understand.”

EXPLAINING THE TECHNICAL TO PATIENTS

Explaining technical concepts to your patients

Nowadays, audience members are more educated and sophisticated than ever before. Many may not prefer being spoken down to – so remember to treat them like adults who want to learn more about what’s going on with their eyewear purchases and eye health needs.

As well, many individuals do their own personal research – regardless of its accuracy. Your job as a Licensed Optician is to ensure that you confirm or redirect them to the right answers.

This means that your audience will always be open to listening to your technical explanation of what they need. It also reaffirms you as an expert and makes them feel like they made the right decision by listening to your suggestions.

One Licensed Optician found that by explaining their process, patients were more likely to take their suggestions and return to ask more questions. They consistently returned as they felt that their expertise was invaluable and that the Licensed Optician really understood their vision needs.

Therefore, explaining your technical approach is always

recommended:

- a. Utilize technical terms with your patients, rather than resorting to what the mass public may use
- b. Explain what the word(s) refers to
- c. Explain how certain situations or products affect them
- d. Ask them if they have any questions

Showcasing concepts using images

There are a variety of ways that people prefer to learn. A common term used to define these ways is VARK. VARK is an acronym for visual, auditory, read/write and kinesthetic learners.

Visual learners learn by imagining an image that represents a concept, they memorize the visual element of the pages in a textbook rather than the actual words. They remember graphs and charts and should be taught either with visual aids that you can draw out or show them.

Auditory learners need to hear your explanation. They need to have it verbally explained to them. They want to hear the details of why and how the product works through conversation.

Read/Write learners need to read through it themselves

and understand the materials. These people flourish in textbook culture, so, any materials you can provide them for them to read themselves will help them with their understanding.

Kinesthetic learners need to feel and play with the product to understand the difference. They need to experience and learn through doing.

Overall, anyone who is keen on learning will want a conversation to understand why you're suggesting specific avenues or products. This isn't necessarily because they're questioning your expertise, but rather, they're curious and want to know more and fully understand what they're buying. You can make them feel more comfortable with this by making sure they know everything there is to know and by teaching them in the fashion they are most comfortable

WAYS TO ENSURE YOU STAY A HEALTH CARE PROFESSIONAL

Explicitly indicate you are a Licensed Optician

Most individuals cannot tell the difference between the O's which is more reason to ensure you differentiate yourself by ensuring you indicate you are a Licensed Optician, a regulated eye care professional.

Do not play cashier

You're trying to remove yourself from being a salesperson. Removing yourself from the till and keeping yourself as an expert roaming the floor allows you to differentiate yourself.

While this may not always be possible, it will help you reinforce your expertise and bring more value to your store – whether it is a chain or independent store.

Provide recommendations based on their needs

As most healthcare professionals do, always ask the right questions before offering your expertise because every individual has their own individual unique needs. Sometimes, patients don't know to provide information, and in order to ensure you provide them the right suggestions, you must inquire about their needs.

Explain your recommendations and the fitting

Another important practice is to explain your recommendations. The more familiar the patient is with the rationale, the more likely they are to take your suggestions to heart. As with most things, understanding will empower them to do the right thing.

Provide Licensed Optician Pamphlet and Reminder Card for next check up

Some individuals may be shy to ask or don't know to ask what it is you do for your profession. Some may be embarrassed to ask as they don't want to offend you, while others may not even realize they're dealing with a healthcare professional. Therefore, it's important to be safe and inform because it's important to educate and reinforce to your patients that you are an expert. Handing out brochures or cards with that information provides your patients with the opportunity to educate themselves too. As well, reminding them to return to ensure they're on top of their eye health is also important. Again, it isn't whether or not you think they will abide by your suggestions, it's that you've done your duty to ensure you've given them the best suggestion to improve and protect their eye health.

Utilize Licensed Optician Terminology

Don't be afraid to use Licensed Optician Terminology. Not only does it inform them that you are an expert, it also helps them understand that there is a lot more to this industry than meets the eye. This also helps you differentiate from a typical salesperson who does not possess the knowledge that you have. Capitalize on your skill set, and, if you value it, your patients will too.

CREATING A REFERRAL NETWORK

CREATING PARTNERSHIPS WITH PEOPLE IN YOUR AREA

Your local area is most likely where the majority of your patients will come from –equal ground to the north, south, east and west of your shop is where your patient's live. Your expertise may expand those areas as well, but by simply getting to know your neighbors, educating them on your role, learning about them, and having them educate you on their role, you will build stronger networks and relationships within your community. Getting involved and being the spokesperson or even just a source of information for those who are experiencing eye issues – from a simple eye strain to headaches to eye infections – will go a long way in reinforcing the importance of your role in the community and

furthermore, the larger role of Licensed Opticians across Canada.

CREATING RELATIONSHIPS WITH YOUR LOCAL OPHTHALMOLOGISTS AND OPTOMETRISTS.

Partnerships with other O's haven't always been easy. Competition and other factors can make these relationships a difficult one to build. However, those that are open to a relationship are usually more concerned with their patient's needs and understand the benefits of building relationships. The only way to build these relationships or to find the willing ones are to set up conversations and meetings where you can educate

them on what you can provide as well as share your expertise on how you can help their patients too – therefore, fulfilling both your jobs.

Creating relationships with Optometrist can be especially tricky. Ensure that you establish the relationship as equals immediately by having both individuals share their expertise before finding two-way referral possibilities. Keep in mind that building relationships with Optometrists that don't carry similar types of glasses or services can generate more of a likely possibility for partnerships.

Ways you can start building relationships:

1. Go to their office and introduce yourself and set up a lunch or a dinner
2. Give them a call to introduce yourself during low traffic hours and drop off brochures with summaries of expertise and available eyewear options
3. Refer patients to them and make sure they mention that you referred them.
4. Care Timeline

One Licensed Optician found herself building a strong relationship with a local Ophthalmologist she respected and it has now flourished into a steady flow of recommendations both ways.

CARE TIMELINE

WHEN TO REMIND YOUR PATIENTS

Sending email reminders to your patients on when to come back into the store for an adjustment will help with your patient relations. By having regular reminders, it will help ensure that their eyewear is up to par.

Below, there are suggestions on timelines for reminders, however, it will highly depend on your patient's needs. Remembering to inform your patients before they leave that it's important to return for readjustments is very important.

- Kids – 4x a year
- Adults 3x a year
- Contact lenses – 1x a year

TOOLS TO REMIND YOUR PATIENTS

Newsletter

You can set up a newsletter by using free online services such as Mailchimp.com, ConstantContact.com and EmmaMail to keep in frequent contact with your patients. You can have them schedule regular reminders based on their needs. Newsletters are the best way to keep top of mind in their personal environment without being invasive. Having patients sign a form with their email addresses is a great way to collect email addresses to ensure you keep in regular touch with them. Another avenue to collect email addresses is when you're filling out information on your computer database, you can also ask for their email address.

Phone Calls

Personal phone calls with close patients are a great way to remind your patients when they need to come in for adjustments etc. Just a friendly afternoon voicemail or a quick call to see what they've been up to is great. These personal touches always make it easier for your patients to trust you.

Point of Sale

Booking a time for adjustments and following up with phone calls is a great way to ensure you can keep in touch. If phone calls and newsletters don't feel like it fits with your store's culture or brand, feel free to just mention the need for adjustments when you're wrapping up with the patient. Just mention that they'll start noticing they'll need adjustments around __ months from now and that they should come in. From there, you can ask how they would like to be reminded before exchanging the relevant contact information.

Social Media

Not everyone is comfortable with social media. If you are not comfortable with it, then you should leave it alone. However, if you are comfortable with it, then you should definitely utilize it to your benefit. Educating the public through these mediums is a great way to keep yourself top of mind. Providing your expertise to the public through these mediums will also help attract the right

types of patients as well as have others refer potential patients that bring up issues in your area of expertise.

Website

There is a reason that almost every business has a website. Often times, patients will go online to find an optician or eye wear store - whether it be by proximity or product, or other factors. It is an easy way to stay relevant and top of mind. Consider it your online storefront where individuals can window shop before making their decision to come into your store. This is a great place to share your expertise and the fact that you are a Licensed Optician.

APPENDIX OF MATERIALS

Licensed Optician explanation of Services Rack Card

