



## **Position Guide for Optician and Optical Sales**

### **Definition**

This position guide is just a guide and not a complete listing of the responsibilities of this position. It is imperative all optical staff are “Impact Players”, meaning they come to work to be useful and do whatever task is needed to make an impact on our patients/customers and our business success.

Opticians assist patients by evaluating their optical needs and desires and providing customized product recommendations. To do this, Opticians must be well-versed in the nuances of frames, lenses, and lens treatments and use their knowledge base to be excellent at educating people to the point they trust you and make a purchase. We believe sales is the act of being able to look for the patient’s “pain” and know what we can do to relieve it...and then some. Some opticians merely take orders by listening to what the patient thinks they want and placing the order. **An order taker is not an optician.** Opticians use their knowledge to increase sales—but through education, not coercing.

Besides educating/sales, opticians dispense, adjust and repair glasses. Opticians use the practice software to access and document patient information and orders.

### **Qualifications**

*Successful Opticians* must be passionate about the industry and seek information that will be useful when educating patients. This means learning about the features of frames, lenses, coatings, and accessories and applying that knowledge daily.

*Opticians must love to interact with patients* and will **always** make the first contact with patients who are within a few feet of them for a few seconds. They are **proactive** about their encounters, not just waiting for a patient to approach them and then giving the stale “can I help you” response.

*Opticians must be accomplished problem solvers* and have extensive product knowledge. They must be well versed in optical formulas, practices, and procedures. Opticians should be computer literate and be able to use the practice software and member vision plan websites. Opticians must have (or develop) an understanding of the various vision plans offered.

*Opticians are consultative salespeople* and embrace the challenge to talk with every prescription-holding patient and to offer their services and products. They possess the needed

knowledge base about optical products and enthusiastically offer the best options of our eyewear to all patients.

*ABO certification or Washington State LDO* is desired but not an immediate requirement. Opticians are required to either sign up with the Health Department as an apprentice or begin studies to take the ABO test within the first 3 months of their employment as an Optician. To use the title "Optician," optical staff must pass the ABO test. They will be considered an Optical Sales Associate prior to passing the test(s) or will be a Licensed Dispensing Optician (licensed in any state).

## **Functions**

### **Pre-sales**

Utilize tools provided by the practice to plan for daily sales. This includes running schedules to know who and when patients are scheduled, who will get a new glasses prescription, and arranging to provide education and orders for them. Opticians should use their creativity -- any time when a patient is not in the department -- to find ways to increase their contact with patients who potentially may need their services.

- Work in liaison with check out staff, asking them to hand out educational flyers and direct them to you upon checking out
- Work with techs to bring patients to you prior to dilation should the tech know the patient needs new eyewear.
- Work in collaboration with our marketing team

Management will support opticians in these endeavors in the form of temporary spiffs or related support upon request by the optician.

### **Sales**

Opticians are to greet any person entering their department within 5 seconds. There is not a system in place where opticians are to take turns with other opticians as immediate attention to our patients is of paramount importance. Opticians are NOT to just ask patients what they want and to place an order. Opticians are to use the protocols adopted by management to include:

- Look at the prescription first (to know whether frame selection is limited)
- Verbalize your findings so the patient can see you are credible and have true knowledge and service to offer.
- Assess the patient's face shape, colors, and ask a few leading questions which will enable you to select frames for the patient. Offer the patient a seat and let them know we use the concierge approach and will bring them customized selections.
- Use the velvet tray and make five selections.
- NEVER limit a patient to their Vision Plan or "go along" with the idea a patient can only get what their insurance will cover. Use the VP to get them the best option.

- If there is an applicable 'special offering' for them, **tell of** the offer (use a flyer if applicable).
- Recommend frames and materials based on your knowledge—never recommend something without telling them why (and make sure your information is correct). Do not ask the patient what material they want —**recommend** it and then let them guide you if they want something else.
- Use the visual aids (lens centers) with your recommendations—let them SEE AR, let them SEE polarization, let them SEE the difference in thickness.
- Most people use more than one pair of glasses. Always assume this; recommend and offer multiple pairs.

In addition to in-person education/sales, it is the optician's duty to answer any phone calls ringing into the optical department unless they are actively already with a patient. In the event they are with a patient and it goes to voicemail, they are to respond to the message before doing any other non-patient facing task.

### **Dispensing**

After the orders are processed, they are checked in (quality checked and marked received in our system) and then the patient is contacted to let them know their eyewear is ready to be dispensed. Any optician will dispense eyewear no matter who ordered it.

Eyewear to be dispensed is to be carefully unwrapped from paperwork (not in patient view) and visually checked for any problems before presenting to the patient. The eyewear is placed on the patient and the optician is to use the markings still on the lens to see if they line up or if adjustments are needed. Look at the nose pads, verify frames are level and feel behind the patient's ears. Always make adjustments.

Use this patient encounter time to resolidify your expertise and service. Talk through what you are doing for them and make any recommendations such as how to wear the new prescription and if they should return for screw tightening.

- Stress service after the sale.
- Give appropriate case and cleaner/cloth letting them know about the free refills and adjustments.
- Give warranty info.
- Collect any balances and mark dispensed.

### **Glasses Checks**

Although most patients are happy with their eyewear after the dispense, about 10% of all eyewear sales (not just with us, but all offices) result in a patient returning with some level of problem. A process was developed for us to systematically check the eyewear as well as interview the patient to be able to do a root cause analysis of the issue and take steps toward resolution. An optician should be able to ascertain the nature of the problem and either make

frame adjustments to correct, reassure the patient it is not a problem, refer to a doctor for medical evaluation or re-refraction, or order a remake to fix the problem.

### **Housekeeping**

- Keep each dispensing station neat, organized and stocked with necessary supplies.
- Keep the frame boards and displays neat and organized and in the correct order as defined by management. Return any frames taken down to their correct places. Always be aware of and correct any frames that are misplaced. Pull from backstock if there are empty board spaces.
- Regularly clean demo lenses.
- Regularly clean mirrors, shelves, and glass countertops.
- Keep all counters and display tops clean, stock supplies and keep tools organized.
- Keep department dusted and the trash/shredding bins emptied.
- Assist with merchandising.
- Keep lens centers in order.

### **Back-office tasks**

Optician's **top** priority is always to be available on the floor for patients (sales and dispensing) or doing pre-sales. That said, there will be times when there is not a patient to help for every optician scheduled. As such, other tasks are assigned to the optical staff with the understanding that they are only to be worked on in the absence of pre-sales, sales, phone calls, or dispensing tasks.

These tasks are provided to you to give you an opportunity to be productive and be an Impact Player during slow times of the day. You are, however, responsible for letting management know if you found you did not have enough non-patient facing time to complete these tasks (so they can be done by management).

- Daily, each location is responsible for running the "in process" report to confirm all jobs from the previous day have been received by the lab. Various reports and faxes are utilized to confirm orders were received.
- Daily, each location is responsible for late job follow up. Refer to the "Late Report" spreadsheet on SharePoint. Notify any patients with delayed orders. Document in Optical Management.
- Daily, retrieve and disperse incoming jobs.
- Daily, mark orders received in Optical Management. Indicate lab invoice number and BAC. Verify orders from lab are correct.
- Daily, match up any incoming frames or parts.
- Daily, reply to all optical voicemails.
- Daily, balance cash box. Retrieve change as needed.
- Nightly, balance batches.
- Weekly, each optician is responsible for reviewing their hold orders.

- Weekly, make follow up calls to patients that have not picked up their order within a week of the last phone call. If more than a month old and paid in full, ship to patient.
- Weekly, prepare Thank you bags for dispense to include a bottle of cleaner and a microfiber cleaning cloth.
- Monthly, each location is responsible for tracer calibration.
- Monthly, create a return batch in Optical Management for any defective frames. Forward the return to the Sedro Woolley location in a DFX transfer envelope. Include a copy of the invoice.
- Monthly, each location is responsible for reporting what supplies are needed by utilizing the “Monthly Supply Check List” spreadsheet on SharePoint.
- Quarterly, each location is responsible for completing inventory for frames and accessories.
- Mentor apprentices (working closely with Training Coordinator) acting as a resource for support, information, and patient care questions. Reinforce skills learned, supervising adjustments and optical encounters.

## **Performance Expectations**

An optician’s base salary is to compensate the optician for

- Covering their scheduled shift
- Greeting and helping patients who are present in the department
- Basic housekeeping chores
- Tasks assigned when there are no patients to assist
- Order taking of less than 45% of patients with prescription
- Basic eyewear dispenses
- Troubleshooting (glasses checks)
- Contact lens orders (usually not assigned to opticians) and contact lens dispenses.
- Low error rates

Pay increases, once the optician is trained and experienced to cover the basic tasks listed above are limited due to the commission aspect of this position. Opportunity for increased pay is solidly within the commission section and unlimited.

**Optician’s commission is to compensate the optician for**

- Sales skills and application of techniques evidenced by increased capture rate and increased second pair sales and increase total sales.
- Sales capture rate over 45% (industry average is 65%) for use of sales skills and work needed to go beyond regular order-taking capture rates.
- Evidence of use of management supplied sales tools (such as flyers outlining our offerings, lens center visual aids, collaboration with other staff) to increase sales.
- Consistently attempting to be the first to a patient—even if patient is not in the department. Using creativity and passion to connect with patients who may otherwise not even stop in the department.
- Commissions are not paid for placing contact lens orders or dispensing.
- Commissions are reduced for vision plan orders that are limited to “what the plan covers” as that is evidence that no sales skills were applied, and compensation is realized under base salary.
- Commissions are reduced if orders result in remakes which are the fault of the optician (excellence in optician skills must remain of paramount importance).

### **Position-Specific Performance Points**

1. This employee is an optical expert, not an optical order taker, as defined in our training.
  - a. Present as an expert with value-added information for patients
  - b. Ask the appropriate questions to be able to make a supporting recommendation.
  - c. Know our product offerings, as well as special offers, and present them appropriately.
  - d. Appropriately use visual aids to help support their educational/sales.

Because of their commitment to listening to the patient’s needs and customizing their recommendations, and excellent sales skills, this employee’s sales exceed others with comparable sales opportunities.

2. This employee performs an excellent dispensing visit.
  - a. Reiterate the features and benefits of the products selected
  - b. Do an excellent adjustment
  - c. Make sure patients understand how to use the product and what to expect
  - d. Explain the warranty to patients,
  - e. Never dispense a product in which a patient is not seeing well or less than expected and tell to “get used to them”
  - f. Give our “gifts” consistently and with explanation
  - g. Invite patients to give a review and/or take pictures with our logo wall.

3. This employee is proficient with vision plans and insurance (billing issues) and consistently gets Medicare ABN and receipts signed real time, collects the correct amounts and documents correctly. Deposits are collected per protocol.
4. This employee is an expert in documentation of orders and patient visits and glasses checks. This is evidenced by another employee's ability to easily follow what is going on with the order/patient without asking this employee.
5. This employee is skilled at troubleshooting and problem solving. This is not only glasses checks but frame/lens delays, special orders, repairs needed. They are **aware** of their department and do not limit themselves to only their jobs. They possess the skills to handle every eventuality that would occur in the optical department.