

Optometry *Divas*<sup>®</sup>  
Empower. Connect. Promote.



**The Optical Sales Process**  
Presented by Danyel Pritchard

CEO of You<sup>®</sup> Staff Certification Program  
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**Start With Mindset**

Everyone who walks into your office have a problem and is looking for a solution.

It is your doctor's job to Identify & prescribe the solution.

It is your job to dispense it.

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**Start With Mindset**

Now that you understand the solutions offered by your doctor, how to best communicate with your patients and the psychology of sales; it's time to talk about the Optical Sales Process.

This process will help you identify problems and show you how to dispense the prescribed solutions.

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### The Optical Sales Process

1. The Needs Assessment
2. The Exam & Prescription
3. The hand-off
4. Dispensing The Solution – Part 1
5. Investment Options
6. Closing the encounter
7. Communicating Order Status
8. Dispensing The Solution – Part 2
9. Follow-up Care

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### 1- The Needs Assessment

- Identify Spoken Needs – Chief Complaint – Expected
- Identify Unspoken Needs – The Pain They've Learned to Live With – Raving Fan Maker
- Identify Wants – What They Think They Can't Afford – The High Revenue Generator & The Loyalty Builder



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### 2- The Exam & Prescription

- Identifying the source and extent of the problem – The diagnostic testing and doctor's exam.
- Identify Solution Options – The Assessment of the problem
- Selecting the ideal solution – The Plan to solve the problem



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### 3 -The Handoff

- Doctor reviews assessment & plan with patient & dispenser – Keeps the focus on the solution.
- Dispenser communicates the benefits of solution to patient – Future pace the patient.



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### 4 - Dispensing The Solution – Part 1

- The Frame Selection – Identifying the perfect vehicle for the solution
- The Ophthalmic Lens Selection – Selection of Quality of The Solution
  - Lens Design; Material; Treatments & Technology
- The contact lens benefits & supply options
- Adjunct Therapy Selection – Nutraceuticals, Dry Eye Kits, Aesthetic Kits, etc.



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### 5 - Offer Investment Options

- Reiterate value – Keeps the patient focused on the solution they desire.
- Future Pace – Helps the patient see how great life will be without the problem.
- Present Price with Confidence – Never explain or apologize for premium price.
- Offer Payment Options – Make the solution affordable – Avoid discounts



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## 6 - Closing The Encounter

- Give affirmations – Congratulate the patient on making a good/smart choice.
- Schedule dispensing & doctor requested follow-up appointments – Build continuity of care.
- Review documents & reiterate benefits of solution – Give peace of mind.
- Communicate delivery promise date.

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## 7 - Communicate Status of Order

- Under promise, over deliver – Always deliver order before promised time – Keeps trust intact.
- Promptly notify patients of any delays in delivery – Where the rubber meets the road.
- Fortune is in the follow-up – You can lose revenue and worst of all, the patient's trust if you don't follow up.

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## 8 - Dispensing The Solution – Part 2 (Pick up)

- Celebrate the moment – Anchors the positive experience.
- Give more affirmations – Congratulate the patient on making a good/smart choice.
- Reiterate value – Keeps the patient focused on the solution they desire.
- Show genuine gratitude for their trust – Give a gift – Referral generator

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### 9 -Follow-up Care

- Confirm solution is working as planned – Phone call/text/email
- Solve any post-dispensing problems – No excuses – Make the patient happy.
- Make the patient a hero & advocate – Ask them to help you help others – Referral builder
- Ask for reviews – Don't be the best kept secret in town



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### Question...

If you were blind, how much would you pay to see again?



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### Answer...

Every Penny!!!

It's never about price, it's always about perceived value.



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**Remember**

You don't sell contacts or glasses.

You dispense **SOLUTIONS** that help people live clearer, safer & happier lives.



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*Thank You*

**Remember to register for the follow-up zoom meeting at [OptometryDivas.com/events](https://www.optometrydivas.com/events)**

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