

## Consumer Profiling in an Optometric Practice

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### Abstract

Optometry is one of the few industries that have an educational, a health and a retail component. For an Optometric practice to experience massive success, all three components need to function cohesively with each other on a daily basis.

Therefore, with that being said Optometrists need to change their long-standing notion of referring to the people that come to their practices as patients, but rather consumers. Within consumers, there are patients, customers and clients. This article details what defines a consumer in terms of Optometry and what are the components involved with each. Thorough understanding of a consumer leads to better and more efficient management thereof.

Consumer profiling in an Optometry practice is important in that it enables the staff to know what type of individual they interact with at any given point of time. This is critical in them knowing what type of expectations consumers have and most importantly what management solutions are available.

**Keywords:** *Consumer; Patient; Customer; Client*

### Introduction

**Optometry is comprised of three distinct areas; namely:**



#### ACADEMIC

which involves Research,  
Learning and the Scope  
of Practice of Optometry



#### CLINICAL

which entails Problem  
Identification and Solving;  
Professional Skills  
Development as well as  
Patient Education



#### BUSINESS

which revolves around  
Exceeding Turnover;  
Practice Management and  
Business Development

Therefore, for an Optometry Practice to experience massive success and exponential growth sales, all three aspects of Optometry need to function efficiently and cohesively together.

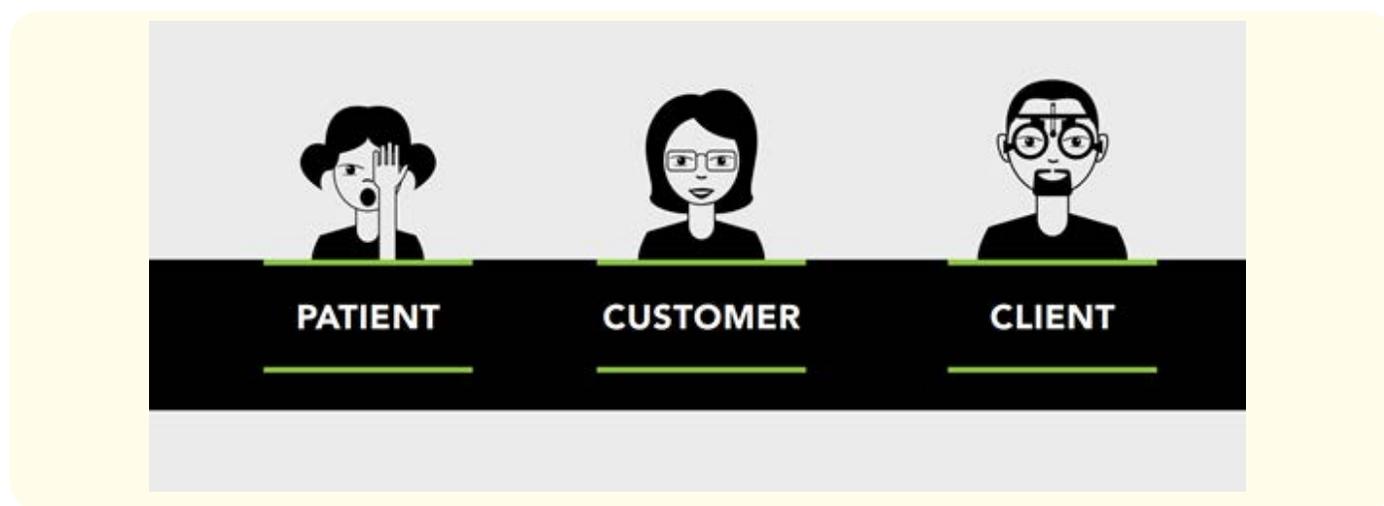
The above means an Optometry Practice owner needs to know and understand when each of these areas are at play in his or her practice at any given time of the day.

With the ever changing economic climate in the world, many Optometric Practices find it continuously difficult to maintain the level of success attained in the past, let alone grow their businesses year after year.

For all these years Optometrists have been referring to the people that come to their practices as “Patients.” However, that is not necessarily the case.

The three distinct areas of Optometry outline that there is an educational, health and retail component in Optometry. That then explains that in fact the people coming to practices should be referred to as “Consumers.”

**Within consumers, there are patients, customers and clients**



**Patient:** The person that has an eye problem that they need to be solved. They are usually the person that comes to the practice for the 1<sup>st</sup> time or is referred by a health care professional. They currently don’t have any visual correction.

**Customer:** The person that currently wears a prescription; knows that they need visual correction or what their problem is but they are not necessarily the person that has been to that particular store before. Not loyal to a practice as yet and may need an upgrade on their current correction.

**Client:** The person that keeps coming back to the same practice year after year for all their visual requirements and management options.

Consumer profiling in an Optometry practice is important in that it enables the staff to know what type of individual they interact with at any given point of time. This is critical in them knowing what type of expectations consumers have and most importantly what management solutions are available.

**Materials and Methods**

Visionstryt looked at different attributes that define the characteristics of each consumer.

We used a detailed questionnaire and assessment form distributed to over 200 practices.

Optometrists across the country in various types of practices completed the questionnaire and assessment which Visionstryt then analysed the results.

The final report is tabulated below.

Consumer Expectations in an Optometry Practice

	Patient	Customer	Client
<b>Question(s)</b>	<p><b>Diagnosis?</b></p> <p>Be clear and specific in outlining their problem so that they fully understand what it will take to fix it.</p>	<p><b>Prognosis?</b></p> <p>Outline what the current prognosis is and detail the benefits the visual correction had.</p>	<p><b>Preparedness for their return?</b></p> <p>File needs to be out already, benefits checked and management options should be already set out in advance.</p>
<b>Answer(s) Required the most</b>	<p><b>Causes</b></p> <p>They want to know exactly why they have their problem, what causes it, how it can be solved and will it be solved permanently.</p>	<p><b>Management Options Available</b></p> <p>Advanced management options that exist to upgrade the current one.</p>	<p><b>Relationship Building</b></p> <p>Staff need to know what the client is wearing, what they are supposed to be wearing, how long they have been a client, how often they come, etc.</p>
<b>No 1 Need</b>	<p><b>Treatment Plan</b></p> <p>Will they medical aid pay for what they need? Staff must outline what they need and its importance versus what will be paid.</p>	<p><b>Cost Implications</b></p> <p>They probably got what the medical aid paid for last time and could not afford what they need. Staff need to describe the upgrade benefits in detail.</p>	<p><b>VIP Treatment</b></p> <p>Clients trust your products and services by now, never stop advising on better products in the management options available.</p>
<b>Want(s)</b>	<p><b>Solutions</b></p> <p>Patients are sceptical about wearing any spectacles or contact lenses and they are relying on you to make informed decisions. Ensure they understand in detail what is wrong with them and what it will take to solve it.</p>	<p><b>Follow Ups</b></p> <p>Customers must be informed about the management regimen in terms of wearing schedule, time frames, return dates, follow up structure and prognosis.</p>	<p><b>Business Development within the practice</b></p> <p>Clients want to see new frames, cleaner store, improved quality service excellence, increased staff performance and most importantly strong leadership. Does your practice reflect that?</p>
<b>Challenges</b>	<p><b>Costs Involved</b></p> <p>Patients are not willing to pay more than what the medical aid pays and usually need more than that. Staff needs to adequately explain the clinical benefits versus the financial capacity of the patient.</p>	<p><b>Record Keeping</b></p> <p>In order to transition them into clients, they records must be in order. Staff need to know what they wearing, what they medical aid benefits are, etc. well in advance before they come for their appointments.</p>	<p><b>Specialized Deals/Discounts</b></p> <p>Clients appreciate it greatly when you give them some form of discount on the extras they need.</p>
<b>Outcomes</b>	<p><b>Return Date</b></p> <p>Staff need to be able to thoroughly explain to patients when they should return and how often. We take this for granted at times; hence we don't remind them accordingly.</p>	<p><b>Service Improvements</b></p> <p>The only acceptable standard of operation is excellent quality service by the practice, nothing else and nothing less.</p>	<p><b>Value</b></p> <p>What are the benefits for the client to keep coming back to your practice? What is it about your business that sets it apart from others?</p>

<b>Financials</b>	<b>Benefits of Management Plan</b> If patients don't understand what is wrong with their eyes, they will not understand what it will take to solve it.	<b>Features and Benefits of Management Options</b> Clinical versus financial management options need to be elaborated clearly to the customer.	<b>They will buy far more than they need and on regular intervals</b> Strong mutually beneficial relationships between the practice and the client will result in them being loyal to your business.
<b>Desire(s)</b>	<b>Quick Solution at low costs</b> Build a trust relationship with the patient in a manner that they understand the new journey of you being their Optometrist and what it will involve.	<b>Progressive Solutions at similar costs to before</b> Remember they want the best but are not willing to pay for it. Your job is to take them to where you both want to go.	<b>They want loyalty from you and they will be loyal to the business throughout</b> No matter how great your relationships are with clients, never compromise the quality of products and services you render to them. Most importantly, stay innovative.
<b>Do's</b>	<b>Competence</b> No one rule; be the best at what you do as a practice.	<b>Service Delivery Improvements</b> No one rule; go the extra mile in what the business does.	<b>Relationship Investment</b> No one rule; make them feel great about themselves every time they come to your store.

### Results and Discussion

The assessment we used to gather the data indicated there are eight key characteristics that define each consumer.

These characteristics focused on what specific character is applicable to which consumer and when does it apply. For years now Optometrists have been implementing these characteristics but applying them to the patient only. Now the above table clearly describes how to categorically place each characteristic with the correct consumer [1].

### Conclusion

#### Consumer profiling is critical for the following reasons

- Practices can now be able to identify how to interact with the respective consumer who usually falls in the criteria: "Please make sure I get what I need to see better, but make sure it fits in my medical aid benefits."
- Owners can now be able to train their staff on how to identify the different consumers and how to profile each type.
- Staff can now effectively and efficiently be able to interact with the different consumers with ease and more appropriately.
- Service delivery will begin to improve further as productivity levels will now increase as a result of adequate consumer profiling.
- Practices can now identify different easy-to-use techniques for consumer profiling such as have stickers of different colours to place on files for identity purposes. It will simplify the process.
- Staff can now be able to identify the upgrade potential on current management the consumer uses.

### Acknowledgements

Visionstryt has published 2 books for the Optometry industry.

Book, one is called Visionstryt's Business Guide for Optometrists and the book summary can be downloaded on [www.visionstryt.co.za/visionstryt-book-summary/](http://www.visionstryt.co.za/visionstryt-book-summary/)

Book two is called Visionstryt's Practical Guide for Optometric Staff and the book summary can be downloaded on [www.visionstryt.co.za/practical-guide-book-summary/](http://www.visionstryt.co.za/practical-guide-book-summary/)

Obakeng Malope is the author of both books.

### Financial Interests

There is no financial interests in writing and publishing this articles.

### Conflict of Interest

No conflict interest exists in the publication of this article.

Malope O., *et al.* "Consumer profiling in an Optometric Practice". Visionstryt's Business Guide for Optometrists (2016) and Visionstryt's Practical Guide for Optometric Staff (2017).

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