



The Customer Journey

Touchpoint **one:** Recognition of need and choosing an Optician

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Touchpoint one: Recognition of need and choosing an Optician

When someone feels that their sight is not as good as it used to be, they will usually decide to book an appointment for an eye examination. If they have not been to an Optician before they will need to choose a practice to visit. Typically most will visit a practice following the recommendation of friends, family and work colleagues. Alternatively, they may select a practice that they feel has a good reputation or because it is in a convenient location. It is rare that they will look through local directories, such as Yellow Pages, to select a practice. The challenge for most practices, especially independents and small groups, is how to promote themselves, so that they will appeal to those selecting a practice to visit for the first time. The purpose of any promotional activity should be to highlight what it is that your practice does that is different from your competitors. However, many practice owners and managers only promote their practices when they are less busy or competitors are promoting themselves. Often the temptation is to use promotions that others are offering for example, 'Half price frames' and 'Two-for-one' deals. Consider these offers as if you were a consumer, looking for an optical practice to visit, for the first time. If every practice in your area appeared to be similar because they were promoting these or a variation of these offers, would you feel that you had a choice? In fact, by appearing to be the same or very similar to other practices means that you are really promoting confusion. This leads to the public feeling that all Opticians are probably very similar, so it does not matter, which one they choose. To ensure that there will not be confusion when people consider the merits of your practice, you will require a promotions strategy.

Promote your differences

Many independent and small group optical practices spend a great deal of time ruminating over the fact that they are better than others at providing a particular service and cheaper than others for specific products. However, they are unlikely to promote the practice effectively so that existing and potential customers understand these differences. Due to the success of large retail orientated businesses at communicating their differences the majority of the public are left to assume, often

incorrectly, that the independent is more expensive for like-for-like goods and consequently not such good value. Therefore the challenge for the independent is to identify a unique profile for their practice and then to promote it. The aspects of the practice that make this profile unique would be described as 'unique selling points'. Unique selling points can be any aspect of the practice that is different. These may include; location, the premises, décor, facilities, staff, clinical services, products and pricing.

Marketing

The way these USPs are communicated, in business terms, is described as marketing. 'Marketing' is; 'A customer-orientated approach to business, that ensures sustainable profit.' Alternatively, Kotler said 'Marketing is a social process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others. When this is understood, anyone can see how important marketing is for any business, large or small. So, in essence marketing is about communication, visual, written and verbal. From the appearance of the practice, window displays, the staff and frame displays to reminder letters, practice brochures and stationery, all communicate a message to customers. In addition, it includes internal communication within the practice team. To ensure consistency of the messages being communicated it is advisable to start with a business or marketing plan that can be shared and agreed with all members of the practice team. The plan should embrace all relevant aspects of the practice, which includes the 'six P's':

- Product
- Price
- Promotion
- Place
- People
- Processes

The messages being communicated by a practice will be conveyed by; the products (and services) offered, including frames, lenses, contact lenses and the eye examination; along with, the prices (and fees) charged, the way they are promoted (displayed and advertised) as well as the appearance and location of the place (practice). The people are the practice team members, who will be motivated to deliver the message.

The level of motivation is determined by the type of person employed and then by training, appraisals and any bonus schemes offered. The processes include each transaction of the customer journey, as well as product ordering and delivery systems.

Successful large and small businesses convey consistent messages with each of the six P's. Smaller businesses, including many independent optical practices, often struggle to be consistent in all aspects. All too often the goods and services offered are of a high quality, but they may not be promoted well or priced appropriately. Larger retail orientated companies spend large amounts of money on promotional activities, including television advertising. Because of this, a proportion of the public have been led to believe that the most important factor to consider when selecting an Optician is, 'Who has the best offer, at the moment?' However, more people appear to be sceptical of the permanent 'special offer' and 'sale' ethos of the High Street.

Before deciding which marketing strategies to implement, a practice's marketing objectives have to be agreed. These objectives may include some or all of the following:

- minimize patient attrition
- achieve profitable practice growth
- inform current and potential customers
- improve dispensing rates
- increase dispensing values

Minimize patient attrition

It is accepted that patients will choose to visit other practices and that the public are not as loyal to any business, as perhaps they once were. This means that all practices have to communicate more frequently with existing patients and not rely solely on a reminder letter, no matter how good it is, every two years to retain them. The aim of this communication will be to remind patients that they have made the best choice by choosing your practice, along with the reasons why. It is worthwhile investing in the retention of existing customers when it is understood that; it can cost seven times more to gain a new customer than it does to retain an existing one.

Achieve patient growth

Some patient attrition is inevitable; so all practices have to find some way of attracting new patients. However, well-established practices gain the majority of new customers through the recommendation of existing satisfied patients. Without the backing of large advertising budgets, it is best to capitalise on existing loyal patients to gain new ones. An appropriate window display can also be an effective method for attracting new custom as well as keeping existing patients informed.

Inform current and potential customers

A practice brochure is a good way to keep existing and new patients aware of the products and services offered by the practice. For ongoing, regular communication and updates a practice newsletter is ideal.

Reminder letters

For many practices the recall system is the only promotional marketing activity. Therefore it is essential that reminder letters generate the maximum number of appointments and dispensing opportunities. Consider reviewing how effective the recall system is on a regular basis, three or four times each year, for example. Success of the system can be determined by measuring the response rate of the existing system. The response rate to the first reminder sent out from an average well established independent practice might be between 30-40% within three months of the first letter being despatched. A second letter, sent three months after the first, may double the responses, in total. Even if the response rate is considered good, the challenge is that it could be better. Experimentation may show that the maximum response is achieved after three reminder letters have been sent. There is no rule that applies to all practices. However, a starting point is to send a second reminder, three months after the first, to those who have not responded. This can be followed-up twelve months after the first, with a more general reminder, for those who did not respond to the previous two.

Some practices continue to use postcards, staid reminders, or uninspiring letters. Whilst these may work reasonably well for a minority, today's more discerning and sophisticated patients require more stimulating methods of communication to encourage them to return.

All reminder letters should carry at least two and at the most four 'messages'. Clearly, the first message is the importance of the eye examination itself. Further 'separate' messages should address more commercial aspects such as seasonal promotions, contact lenses and product specific promotions.

With a computerised database it is relatively easy to 'personalise' reminders to reflect:

- Patient age
- Last purchase date
- Last purchase value
- Spectacle prescription
- Specific interests

Personalising reminder letters using these data will improve response rates and help patients to become more aware. Not only is the reminder fulfilling the clinical objective regarding the importance of the eye examination, but also providing information regarding the latest product advancements relevant to them. An additional way of enhancing the reminder letter is with the inclusion of appropriate, targeted product literature, or a practice newsletter. However, the danger with this is the temptation to fill the envelope with all types of literature. As a guide, do not be tempted to enclose more than two pieces of literature with each reminder letter. Each piece of information should be referred to in the body of the letter. Now, it will appear to have been included intentionally, increasing the possibility of it being read by the recipient.

Practice brochure

As every practice has its own unique profile, a practice brochure is the best way of detailing the practice's location, services, opening times, specialist products and personnel etc. It should be available for all new patient enquiries and as a reference source for existing patients. It is the ideal tool for promoting the practice through door-to-door delivery in targeted areas.

As the practice brochure is likely to have an extensive shelf life, it should be more generic than a newsletter. It is important for its quality to be appropriate for the standards of clinical care, service and products the practice may wish to highlight. Also, consider sending it to existing patients to remind them of all the products and services your practice offers. This may lead to more business from them, as well as encouraging them to recommend the practice to others.

Newsletters

A practice newsletter is one of the most popular ways to keep people informed of the latest product and practice news. It can be designed to reflect any image desired by the practice and can be hard-hitting or passive. They can be enclosed with reminder letters or distributed alone, to existing as well as potential new patients. Due to the expense of producing a quality newsletter many practices choose to use syndicated newsletters from one of the specialist optical marketing organisations. It is advisable to include a covering letter to highlight any topics you feel will be particularly pertinent to your patients and practice. Alternatively, with a little time and effort a simpler two-colour newsletter could be produced twice a year, specifically for your practice. This could include general practice news, as well as additional clinical and product information. The emphasis however, could be concentrated on your own practice promotions and news. This would be ideal for enclosing with reminder letters as well as sending to local businesses and prospective new patients.

Public relations (PR)

PR is a mystery to many people. However, the aim of public relations is to raise the public's awareness of individuals, businesses, charities, etc. PR agencies exist to report newsworthy items through the production of press releases. These are distributed to newspapers, magazines, radio and TV stations in the hope that some news coverage will be given to the story. It is a fact that a news story is far more effective as a promotional tool than an advertisement. However, an independent practice is unlikely to be able to justify the expense of a PR consultant or agency.

The independent practice can still benefit from PR by producing their own press releases and then try to build a rapport with the news editors of local newspapers and radio stations. Once again, the objectives for this activity must be considered first. Also, who are the target audience?

Is it:

Existing patients?

To further cement a relationship with them, to encourage regular visits and generates recommendations

New patients?

To impress potential customers with the message of quality eye care, fashion and good value.

Staff?

Subconsciously, good PR will make the staff feel part of a successful team and become more supportive of the practice's business objectives

Realistically, any positive PR activity will have an effect on all three groups.

Press releases

1. Local newspapers are always looking for items of local interest. Whilst it is not recommended that practices bombard their local newspapers with press releases, reporters are constantly searching for stories with local community interest. Ideas based around unusual charity or fund-raising events, anniversaries and celebrations are fairly typical.
2. Local radio can be exploited by offering to present and discuss educational subjects such as general eye care, contact lenses and also one-off subjects such as National Eye Care Week and glaucoma awareness.
3. Contact with local businesses including offices, shops and involvement with local organisations such as sports clubs, institutes and schools are ideal vehicles for PR, as well.
4. Joint promotions with suppliers and local fashion and travel retailers will highlight the more fashion conscious customer, as well as attracting clients who require sunglasses for their holidays.

5. Guide dogs for the blind. A successful method for ensuring good PR is to raise funds by charging non-patients for replacing screws (and adjustments?) and when the funds are sufficient, purchasing a guide dog. PR can be generated not just for use with existing clients, in newsletters and in-practice literature, but also with local newspapers and local radio stations. Some practices have increased their private eye examination fee and choose to donate £1.00, from each private examination, to this fund. The cost of a guide dog is currently around £2,000.

So, PR is way to generate positive interest in the practice without it costing a great deal of money or giving anything away.

Advertising

Advertising is the easiest communication option to utilise. However, it is not always the most cost effective. Repeat advertisements in local papers and Yellow Pages become almost habit forming. Advertising can be worthwhile if there is some form of 'hook' or encouragement for the reader to respond. Although on the whole an effective campaign will be too expensive for the majority of small practices to consider. Let us consider the popular advertising options.

Yellow Pages

Yellow Pages advertising, for the majority of practices, is an expensive way to list address and telephone number information. Unless the practice is in a busy city centre or holiday location, people do not tend to look for a new Optician in the Yellow Pages.

If a potential customer does look in Yellow Pages they will be drawn to larger advertisements (usually groups and chains) who have multiple-site listings. To compete with these a full or half-page advertisement is required, costing many hundreds of pounds each year. Unless such an advertisement generates 60 - 150 new customers a year, which is unlikely, it is difficult to justify, financially. However, before making the decision to reduce your Yellow Pages advertisement to a simple entry, ask all new patients what prompted them to visit your practice.

Radio and television

This is usually the reserve of the larger groups. It is typically very expensive, with prolonged campaigns necessary to be successful and achieve the 'critical mass' to justify the investment. However, some product suppliers are happy to co-sponsor radio advertising campaigns, from time to time. These may be more worthwhile as the financial exposure of the practice will be reduced.

Local newspapers and magazines

This is often the more attractive option for independent practices. These media are available in numerous forms; daily local, paid weekly, and free weekly newspapers. Local magazines may be monthly or quarterly.

Daily and weekly publications need frequent insertions to be effective and the cost is often prohibitive for the likely return.

Local and regional magazines, along with weekly (paid for) newspapers may be a better option for 'advertorials', where an advertisement appears alongside an editorial feature about some aspect of the practice. Generally, local magazines have a much longer 'life' on the coffee table and potentially numerous individuals will read each copy, making this form of advertising more cost-effective.

On the whole advertisements in weekly free newspapers are not cost effective. This is because they have so much advertising that the majority of readers will ignore your advertisement, unless it is particularly eye-catching.

Direct mail

This is probably the most efficient and cost effective way to promote an independent practice. Targeted marketing by postcode area is one way of ensuring the delivery of the practice message. The delivery can be scheduled and distributed when desired. Newsletters or practice brochures can be used for direct mail along with seasonal promotional materials, or just a letter. It is advantageous to have a 'measurement device' or 'hook' such as a voucher or competition, to gain feedback on the success of each strategy. However, it does not mean the campaign was not a success if just a few vouchers are returned. Many people may

come to the practice because of this activity, although they may not bring the voucher with them. This is why it is important to ask all new patients, what encouraged them to visit your practice.

There are three popular types of delivery system to consider;

(1) Newspaper inserts

This method is not advisable, as inserts often get lost among other leaflets. Also, it may degrade the practice image by being promoted alongside fast food, double-glazing, etc.

(2) Leaflet drop

The delivery is undertaken by specialist companies who distribute advertising information. This should be considered a second choice as there is no real 'audit trail' and leaflets may be 'dumped' before delivery.

(3) Royal Mail Household Delivery service

This method is highly recommended because of the stature of the postal service. It is ideal for targeted deliveries by postcode area and costs much less than second class postage. The envelopes will not require a delivery address either.

Tip: Always use an envelope overprinted with a suitable 'hook' or message such as 'For your eyes only...'.

Alternatively, a trusted individual can be employed to deliver direct mail for the practice. The advantage of this method is that practice brochures or newsletters can be delivered to specific streets or estates irrespective of postcode.

Effective merchandising

In today's sophisticated retail environments, merchandising and display are considered as much a science, as an art. It is fair to say that poor quality product displays and promotional materials are usually representative of lower quality retail establishments, in the minds of customers.

The main objectives of good merchandising and display should be to;

1. Make customers aware of products and promotions available
2. Inform customers where products and promotions are

Merchandising begins with the window display. This is the first opportunity to attract potential customers into the practice, as well as reassuring existing patients that they have made the right choice.

Few people have the creative skill and flair required for window dressing. If a member of staff does not possess these skills, it is worth employing a professional. However, do ensure that the message or theme being conveyed is appropriate. Many practices have seasonal themes such as rabbits and daffodils in the spring and fallen leaves in autumn. Whilst these may be aesthetically pleasing to passers by, they do not necessarily project the practice's primary business messages. However, a 'linked' theme such as Winter sports with sunglasses or a Wimbledon theme in June can be more effective.

Many suppliers provide good quality displays, which project this optical message. Optical products due to their small size are often difficult to display effectively. However, clean and simple window displays can be created with the use of image boards and other promotional point-of-sale materials.

All merchandising and display should be intended to encourage people to;

- (a) Visit the practice
- (b) Consider the better product options

Always use the A.I.D.A. model when creating new displays. Ask yourself, 'Will this display have this effect on those who see it?'

Attention – stop and look

Interest – attract and think

Desire – consider and want

Action – need and buy

Many optical product suppliers provide excellent point-of-sale (POS) materials available for window and in-practice displays. Also, the marketing groups provide marketing, promotion and merchandising packs for members. However, only use materials that are relevant to the message the practice is communicating at the time. The use of irrelevant materials, regardless of how good they are, will only send a confusing message.

To conclude, if you want to communicate and market your practice effectively, keep it simple. Never try to convey too many messages at once. Select one or two frame ranges, an ophthalmic lens type and a contact lens brand to promote at any one time and then another selection in six or eight weeks time. This will ensure customers are not confused by the huge array of messages and products being presented to them.

Summary

Whichever marketing activities you implement, try to ensure that the outcome can be measured. For example, when advertising or distributing a practice newsletter, include a voucher or coupon that can be brought to the practice by respondents.

Customer Journey materials

'Making the most of your visit' leaflet (ZCJMOSTLEAF1)

'Targeted customer letters' www.thecustomerjourney.co.uk

Action Plan

Spend some time to review the way your practice promotes itself. Consider; recall letters, window displays and the use of Point-of-Sale materials. Put a plan together for the next 12 months to ensure that your practice promotes a consistent message that builds throughout the year.

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