

First Impressions to Lasting Loyalty

1 hour

Patrick Stifter, OD

Course Description

A customer service-driven course focused on building a premium patient experience from the first interaction through final dispense. The business objective is to increase ASP by reinforcing that better experiences support higher-end product choices on the primary pair, including increased premium product penetration.

Learning Objectives

- Explain the importance of first impressions in an optometric practice and identify behaviors that create a welcoming environment.
- Differentiate the customer service expectations for each office role: front desk, technician, scribe, optician, billing/coding, and manager.
- Demonstrate effective communication skills, including phone etiquette, use of patient names, and delivery of difficult information with empathy.
- Apply a patient-first mindset by customizing service strategies to meet the needs of individual patients.
- Analyze best-in-class service models (Ritz-Carlton, Chick-fil-A, Chewy, etc.) and connect these practices to eye care.
- Recognize the impact of customer service on patient satisfaction, online reviews, repeat business, and referrals.

Course Outline & Timing (50 Minutes)

1. Introduction & Icebreaker (0–5 minutes)

- Welcome, presenter introduction, and review of the course objectives and agenda; set the tone for the session
- Icebreaker: participants recall a recent standout — and a poor — service experience and name what made the difference
- Define “first impression” and the psychology of initial perception: the first 7–30 seconds, the halo effect, and lasting patient perception
- Real-world anchor (Denton Sports Chiropractic) showing how a welcoming environment shapes patient expectations before clinical care begins
- Frame the business case: how the service experience builds patient trust and supports confident eyewear and premium-product decisions

2. Role-by-Role Expectations (5–15 minutes)

- Front Desk: acknowledging and greeting every patient within seconds, professional phone handling, and clear communication of wait times at check-in and check-out

- Technician: courteous explanation of pre-testing, hygiene and infection-control etiquette, and a smooth hand-off to the doctor and optician
- Scribe: accurate, discreet documentation while staying attentive and unobtrusive during the exam
- Optician: needs-based dispensing communication — lifestyle questioning, frame and lens recommendations, setting accurate delivery expectations, and follow-up at dispense and pickup
- Billing/Coding: plain-language explanation of insurance benefits and out-of-pocket costs, and empathetic resolution of billing questions
- Manager: modeling service standards, coaching staff, and leading service recovery to keep the experience consistent across every role

3. Skills Development (15–25 minutes)

- Being first to speak: using the word “welcome” and acknowledging every patient who enters the optical
- Using the patient’s name appropriately and consistently throughout the visit
- Phone etiquette: answering standard, tone of voice, professional hold and transfer procedures, and a courteous close
- Nonverbal communication at the dispensing table: eye contact, body language, and active listening
- Delivering difficult news with empathy — e.g., a prescription change, lens non-adapt, a service not covered by insurance, or a delayed or remade job
- Customizing the encounter to the individual patient’s lifestyle, vocational, and cosmetic needs

4. Case Studies & Best-in-Class Examples (25–30 minutes)

- Ritz-Carlton: staff empowerment, personalization, and anticipating needs — applied to remembering patient preferences and proactive service recovery
- Chick-fil-A: consistency, courteous language, and speed without rushing — applied to greeting flow and dispensing
- Chewy: proactive follow-up and generous problem-solving — applied to patient follow-up calls and warranty or remake handling
- Group discussion: identify one transferable practice from each model to apply in the attendee’s own optical

5. Impact & Statistics (30–40 minutes)

- How the service experience drives patient retention and repeat eyewear purchases
- The link between service quality, online reviews, and a practice’s reputation — and how reviews influence where new patients fill their prescription
- The connection between patient trust and willingness to invest in premium lenses, anti-reflective coatings, and a second pair (impact on average sale)
- The cost of poor service: patient attrition, negative reviews, lost referrals, and prescriptions walking out to online and retail competitors
- The role of referrals and word-of-mouth in growing an optical patient base

6. Role-Play & Practice (40–48 minutes)

- Break into small groups organized by office role
- Scenario A: greeting and recovering a late or frustrated patient
- Scenario B: delivering disappointing news (an Rx change or non-adapt, a premium lens not covered, or a job delay) with empathy
- Scenario C: clearly explaining a billing or insurance issue and de-escalating concerns
- Debrief: groups share their approaches; facilitator highlights effective language and body language

7. Wrap-Up & Action Commitments (48–50 minutes)

- Summarize key service behaviors by role and the link between experience and premium-product acceptance
- Each participant commits to one specific service behavior to implement immediately
- Open question-and-answer
- Evaluation invitation