

Everything You Need to Know About Optometry Marketing



OPTOMETRY**MARKETING**.COM

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Hello!

Tyler

here with

Optomtery

Marketing

.com

We help optometry practices, opticals, and eye centers hyper-accelerate their growth. We've built marketing funnels and websites that drive real leads for our clients.

As well as an entrepreneur, I'm also an avid learner. I love understanding people, how people work, and how businesses can best connect with and serve them.

In addition, I believe in healthcare. I believe optometry is incredibly important to overall health and lifestyle quality. In fact, my wife is an optometrist! She's one of the co-founders of OptometryMarketing.com. I understand the value that you provide to your customers, and I want to help you reach more people so that your community can live healthier and more fulfilling lives.

Enter this amazing and informative guide. This document is designed to help you market your optometry practice effectively no matter where your market is, who your clientele is, or how long you've been in business.

In fact, this guide contains the foundations of a really solid digital marketing plan for your business. We'll address the most common marketing channels available to you, how to actually use them to market optometric services, and how to track and measure the revenue generated by each channel.

HOW THIS GUIDE IS DIFFERENT

Instead of focusing on Facebook ads, SEO (Search Engine Optimization), print ads, etc. right off the bat, we will begin by focusing on your **customer**.

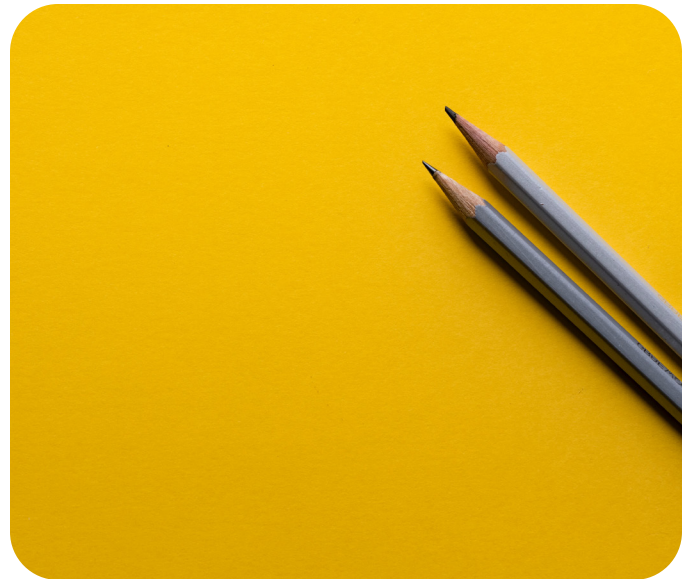
Your customer is the one that makes you money and helps you grow your business. Your customer is the single most important factor in building your business.

Marketing is about getting in front of the right customer with the right message at the right time. That's it. If you can do that, you'll grow your business and succeed.

If you can't do that, you'll waste time and money without getting the growth you are hoping for.

As we talk about marketing channels, we'll do it through the lens of the customer and how your customer can find you.

As an operator of an agency that focuses on digital marketing, we'll also spend most of our time on the digital aspects of marketing a business. There are many marketing opportunities that aren't digital - and at times those may be valuable. We'll touch on a few of them briefly, but our expertise is digital marketing.



We will write largely about digital for three main reasons:

- **It's what we know best** - When you need a complex surgery performed, you go to the expert. We are experts in digital. Although these principles may apply to other, non-digital channels, we will focus on our field of expertise.
- **Digital scales effortlessly** - Once you have a digital marketing campaign that is working, it is very easy to scale it up. If you're using a non-digital channel, it's almost impossible to scale a campaign in a way that actually gives you significantly more financial gain. With digital, you already have the assets (ads, website, content, etc.) in place, so you can often just turn up the money spent on the ad to get massive results.
- **Digital is easier to measure** - In order to feel confident pouring more money into marketing, we need to make sure that we're getting results. We want to measure and understand the ROI (Return On Investment) of our campaigns so that we can scale in a cost-effective way. Digital is simply easier to measure.*

- Bonus Point: If I came up to you with a hot stock tip and told you that a stock would increase by 50% over the next few months wouldn't you buy as much of it as possible? Of course, because that would be a good investment. It's the same with marketing. Digital allows us to measure the effectiveness of your marketing campaigns. We can tell if you spend one dollar, how much you make back. That allows us to scale massively. If you made \$1.50 on every marketing dollar you spent, how much would you spend? What if you made \$10 on every marketing dollar you spent? How much would you spend? If you answered "a lot", you get it. Marketing is an investment, not an expense.

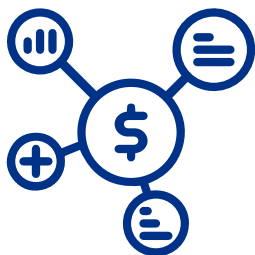
ASSUMPTIONS:

As we move through this document, we'll also be making a few assumptions about you and your practice. These are:

You or someone on your team has the ability to execute these strategies. At a base level, that means you have someone with a basic understanding of copywriting, landing page development, web development, and basic graphic design skills. You have some budget to spend on marketing.

A marketing budget of anywhere from \$500/mo to \$10,000/mo or more is ideal. You'll also have to buy some ads, develop some content, and otherwise promote your brand. Even if you have no budget, this guide will be helpful, but the implementation is going to take both money and time. Marketing is work, but it's an investment that, when done well, will pay off massively in the long run.

You care about growing your business. - Like I mentioned above, marketing and growing a practice takes work. You may be able to (and ideally should) outsource most of the work, but you're the one ultimately responsible for the success or failure of your marketing efforts, not your agency or freelance designer. If you're prepared to take ownership, you'll see it through to success.



ON TRYING AND TESTING

This book contains many best practices and hard won formulas that have served me well over the years. When in doubt, stick to the formulas attached, as they will likely have the greatest impact for you and your business.

I know you're smart (after all you have a very difficult advanced degree!), but just like you wouldn't want me to do your eye exam, you need to apply my expert recommendations. Don't follow them because they are perfect, but because they are what will have the highest chance of success upon implementation.

The landing page examples, ad copy, and other content has been created by our team based on industry best practices and is known to drive results. In other words, deviate at your own risk.

But, if things aren't working, feel free to test additional strategies, headlines, and offers. There's no way we'll give you the complete list of every possible success in this guide, just use this as a starting point and continual reference.

Let's Get Started:

Now let's move on to the actual strategy.

For optometry, we're trying to accomplish three unique goals.

- 1. Get clients in the door**
- 2. Build a brand in the local community**
- 3. Drive as many return visits as possible**

These goals may pull against each other at times, but in order to grow and build a successful practice, we need to accomplish all three of these. Our marketing campaigns and plans should be designed so that we cover each of these areas. We'll go in the order listed above:



Part 1:

Get Clients in the Door

This may be the single most important aspect of your marketing. After all, you might have an amazing brand, but if you can't get paying clients in the door, you don't have a business! Let's talk about how to do that:

FOUR TYPES OF PEOPLE

When it comes to getting clients in the door, there are basically four broad categories of people who are looking for eye exams. These people all have different levels of intent. Intent is simply a measure of how likely they are to become an immediate customer. High intent users are likely to fill out the form or pick up the phone immediately. Low intent customers need to be encouraged and convinced before they take action.

Understanding this user intent is how to determine which marketing strategies and channels we should use. We want to meet users where they are and move them into a long-term, healthy relationship with us.

People looking for eye exams NOW!

This is the first group of people we want to influence. These are the people who know they need an eye exam today and

are looking for optometrists in the area who can meet that need.

This group is working from one of the following mindsets::

- They need contacts or glasses and the exam is just a "path" to get them those new glasses.
- They just need an exam as part of overall health checkup, for a new job, or a driver's license.
- They are having a medical/vision issue that needs to be addressed.

These folks are shopping and comparing eye doctors. The intensity of research varies from "clicked on the first one that showed up" to "I spent 5 hours reading reviews online", but these are high intent users. They need an exam now, and they are ready to pay money to get it.

In order to get in front of them, we need to use the follow strategies. All of these revolve around search. Google (or another preferred search engine) is the number one way people look for information - especially in a market that they don't know. So you need to be where people are searching.

SEO

The number one way to get in front of people looking for help is through search engine optimization (SEO). This puts you on the first page of Google's results. Almost every single click for a search result ends up on the first page of Google, so the more real estate we have, the better.

Unfortunately, a deep dive into SEO is well beyond the scope of this ebook (in fact, we've produced a whole course on how we do SEO that you can check out online). But there are a few "rules of thumb" that can help you rank.

Keywords

The first step in SEO is understanding what people are searching for. This part of the process is known as Keyword Research and is an integral part of the SEO process.

Fortunately, we've compiled a list of the most common search terms for optometry and optometric practices that are searched for online. If you'd like the list, send me an email at tyler@optometrymarketing.com. I'll be happy to share it.

It's also useful to note that some search

queries around optometry are going to be highly localized. That means if you search for "Optometrist" in Austin, TX, you'll get results from the Austin, TX, area. This also means we need to ensure that you're ranking well locally for the keywords you've chosen.

Competition

Knowing whether you can rank for your preferred keywords is almost entirely based upon your competition. If you have competition who has invested heavily in digital marketing and does well in search, it will be harder to beat them. However, if you have only 2-3 competitors in your city, there's a good chance that you'll be able to rank fairly easily.

The easiest way to tell if you're ranking for a particular keyword is to start a new "private" or "incognito" browser window on your computer or phone and just search for the keyword. A good one to start with would just be simply search for "Optometrist in (your city)" or even "optometrist near me".

Do you show up in the organic results on the page? If so, great! Let's make sure you stay there. If not, there are likely some big untapped marketing opportunities for you.



When to do SEO:

- Is there a ton of competition in the marketplace? If so, SEO can be worth it, but difficult. If no, (and you're not ranking yet) it's low hanging fruit! It should be part of your plan. *P.S. If you're not sure how steep your SEO competition is, reach out to me at tyler@optometrymarketing.com and we'll help you evaluate. We have tools that allow us to assess this quickly.*
- Are you already ranking well for these keywords? If you're not in the top 5 spaces, there are likely huge areas of improvement. Since you're already on the first page, incremental improvements should be easier.

When not to do SEO:

- If you need results *now* or you'll go broke, don't do SEO. SEO is powerful and is a HUGE asset to your business, but it takes a long time to implement.
- If you are in a large market with stiff competition in search, SEO may take too long to get moving. It would benefit you to still put some money and effort into it, but you'll be playing an even longer game.

LOCAL LISTINGS

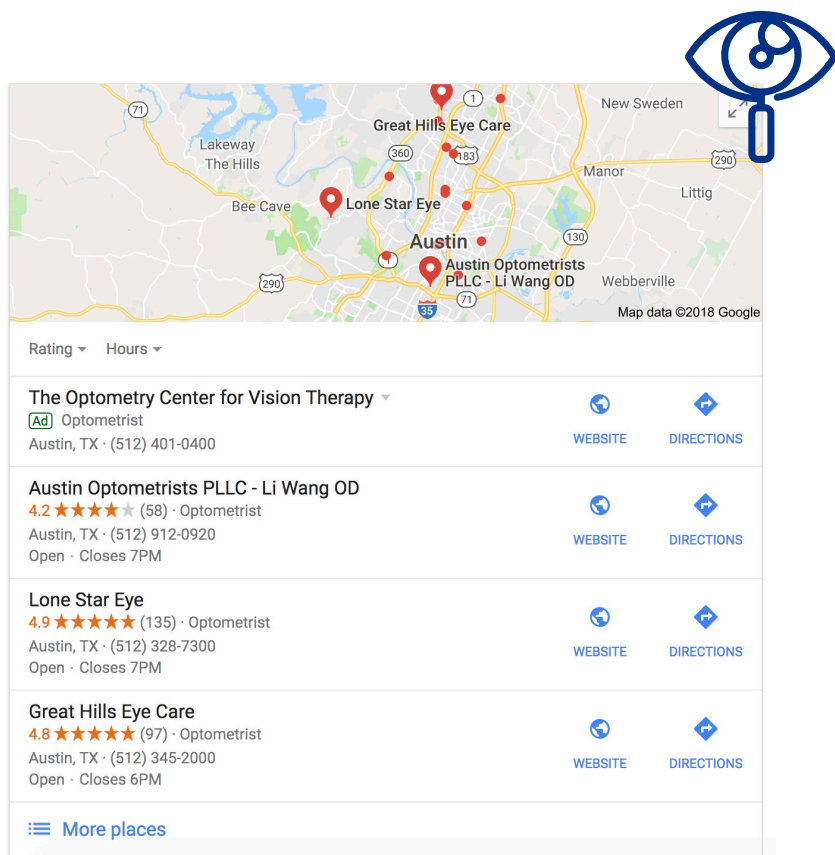
When you did the search for "Optometrist in (your city)" as mentioned above, you likely saw results that look something like this:

What exactly are these?

These are known as *local listings*. In Google's world, sometimes they are called Google Places or Google My Business. What we call them doesn't really matter, what are they?

These listings show up above the organic search results in Google and give you a quick list of all the businesses that meet your search requirements. You'll see similar results for restaurants, doctors, lawyers, and just about every other local business. Many of the clicks that would otherwise go to search, go to these results. Therefore, as a *local* business, ranking here is very important.

At the bare minimum, you need to get a Google account and **set up your business**. Make sure your information, including address, phone number, hours, and contact are all correct. Before you have a chance of ranking anywhere else, this is the first step.



Now, how do you actually show up “above the fold” or in the top results on this page? There are several factors that play into it, and Google lists them. Here are the big ones:

1. Relevance - Obviously your business has to be relevant. This is where having a useful description and proper information can help immensely. .
2. Distance - Closer distances tend to show up first, so you need to make sure your physical address is correct and updated.
3. Prominence - This is a mix of several factors, which mostly include information from users who visit your office. Factors can also include things like overall SEO performance of your website, number and quality of reviews, your responsiveness to reviews, click-thru rate, and other factors - both online and offline.

Local listings on Google are also extremely useful because Google uses these as part of its maps search and maps functionality. When users load Google maps and your company has a full profile, great reviews, and photos, you're more likely to get contacted.

In order to really improve your ranking here, we suggest a few basic steps:

- Setup your account with Google
- Ensure all relevant info is up
- Add photos and logo
- Do basic (or advanced) SEO on your main website
- Try to get as many positive reviews as possible (encourage clients to leave reviews when appropriate)
- Work on building your brand across the web by setting up other local listings on similar websites (Yelp, etc.)

OTHER LOCAL LISTING

It's also extremely helpful to get your business on as many quality directories as possible. Directories are like the “yellow pages” of the internet. Yelp is one of the biggest online directories, but there are dozens of similar services.

Setting up local listings is ultra-time consuming - especially if you've never done it before. I highly recommend hiring a company or using software to help with this process. As always, if you'd like help in this area, reach out to us. We'd be happy to chat. You can book an appointment online [here](#).

When to use local listings:

- For a local business (like your practice), you ALWAYS want to have a local listing setup
- How much effort you put in is largely dependent on your long term strategy. Ranking at the top can be huge, but it takes a lot of time and effort.

When to not use local listings:

- Virtually never. You should at least set up your Google, Facebook, and Yelp local listing at a bare minimum. It takes a couple of hours, and it does no harm.

PAID SEARCH ADS

Check out the result of a Google search below:



Stars In Your Eyes Optometry | Locally Owned & Operated

(Ad) www.starsinyoureyes.com/Austin/Optometrist

Experienced **Optometrists**. Try Us & You'll See a Difference. Schedule Online. We See Things Differently. Dedicated to Quality Care. Trained Professionals. Downtown & Rosedale.

📍 2116 Hancock Dr, Austin, TX - Open today · 9:00 AM – 5:30 PM

Schedule an Appt. Online

Select the location, date, and time that works best for you.

Hours and Locations

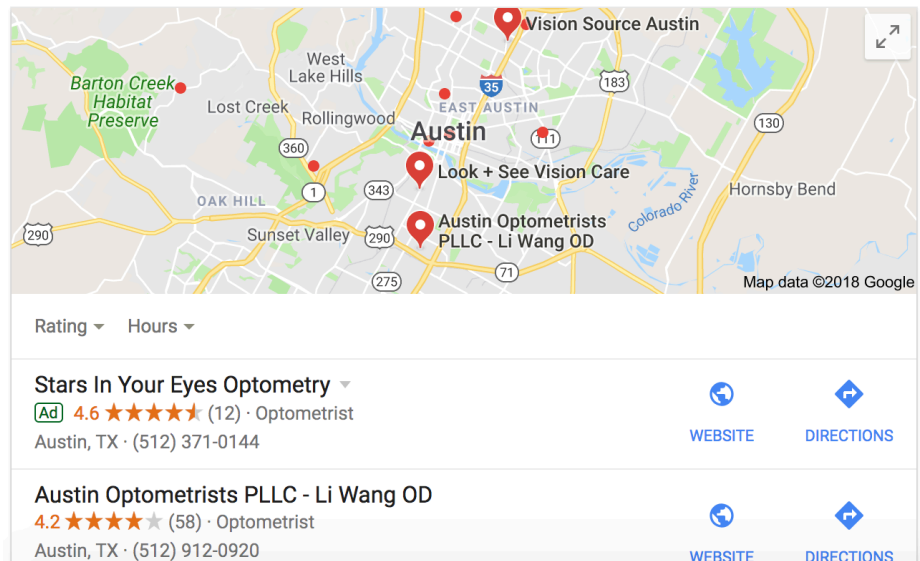
Two convenient Austin locations in Rosedale and Downtown.

Westlake Vision Therapy | COVD Board Certified | ocvt.info

(Ad) contact.ocvt.info/Services/Therapy

Developmental & behavioral **optometrists** crafting individualized therapy programs. State of the Art Facility. Specialized Exercises. FNORA **Optometrist**. Patient-centered Care.

📍 10601 Pecan Park Blvd #201, Austin, TX - Open today · 9:00 AM – 6:00 PM



The top two results (above the map) and the first result below the map all have a little green “Ad” icon next to them.

That icon means that those companies are actually paying to show up near the top of the search results. This type of advertising is called pay-per-click advertising. It’s called that because....well....the company pays every time someone clicks on the ad.

These types of ads are likely how Google make money. The tens of billions of ads served every single day is the reason Google makes so much money. Every time your customers click on those ads, you pay a little bit, but they get directed to your website. These ads can be a huge benefit to your business when used properly.

Setting Up Search Based PPC Campaigns

The biggest search engine is Google. Google's ad engine is called AdWords (recently updated to just "Ads") and it's one of the world's most powerful ad platforms. We can set up search based ads based on keywords - similar to what we'd do in SEO.

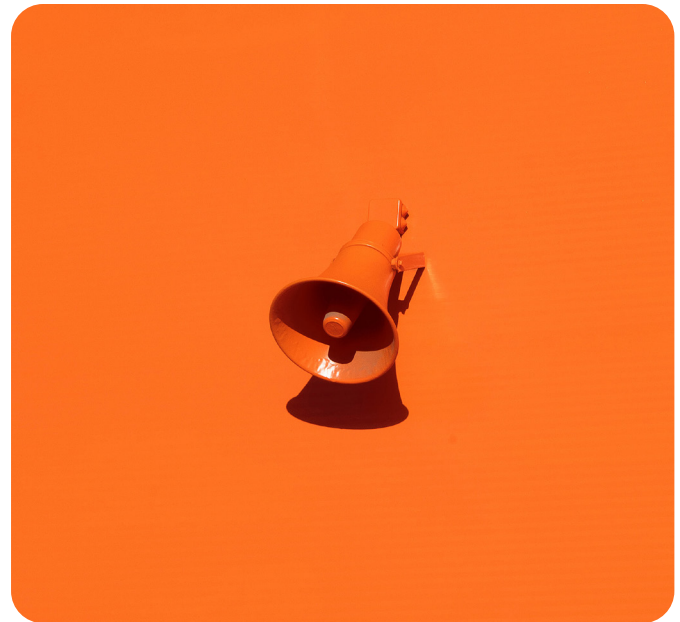
Much like SEO, a deep dive into AdWords is a bit beyond the scope of this guide, but here are a few tips and guidelines to follow when setting up a Search campaign in AdWords:

- Find the appropriate keywords. A few ideas include: *Eye exam, optometrist, optometry, eye doctor, eye care, glasses, contacts, prescription glasses, eye test, optical*, etc. Some of these keywords may be more or less useful depending on your business and you'll likely need to refine them over time.
- Set a localized target area. You only want your ads to appear to people within a specific area, usually 10-20 miles from your main location. If you're in a small town in the middle of nowhere, you can expand the distance slightly.
- Determine bid price - Search based ads like these are auction based. The price you need to bid to show up first depends largely on what keywords and price your competitors are bidding. Clicks will be more expensive if there are many competitors in the marketplace.
- Write great ads - Writing great ads is hard. A few tips here:
 - If you have a unique offer, put it in the ad
 - Talk about how many great reviews you have online
 - Why are you better than other competitors?
 - Do you accept insurance or medicare? This can be an important factor for some people.
- Send them to a landing page - A landing page is a page that is designed to drive action. Your goal is to get the user to convert. Your landing page should have:
 - Great copy - Why should users work with you?!
 - A clear call to action - You have to ask for the sale. Have a phone number and form that users can fill out.
 - Social proof (positive user testimonials) - As humans, we like to know we're making a good choice. Having testimonials on your site is a great way to add credibility.



When it comes to paid ads of any sort, your goal is simple: **you want to make more money than you're spending**. If the lifetime value of your customer (the total amount of money your customer will spend with you in their life) is greater than your cost to acquire and serve a customer, you're in great shape. If it's less, then you need to tweak your campaigns.

Notice I said *lifetime value*. It'd be great if you could recoup your whole cost on the first exam, but that isn't always possible. Over time, your goal is to recoup all the cost *plus* make a healthy profit on each new patient.



People Who Have a Vision Problem and Are Looking For a Solution

The next group of people we want to market to are people who have a vision problem and are looking for a solution. These people may be reluctant to go see an eye doctor due to hassle, cost, or some other reason, until they are convinced that they absolutely must.

For these types of clients, your main focus is on making the fear of what might happen if they don't see a doctor greater than the fear or reluctance of going to see a doctor. You may think this sounds too crass or manipulative, but let me ask you an important question: **Would you rather convince a potential patient that they need to come in for an appointment, or feel partially responsible for a major medical or vision problem that potentially develops?**

It is true that their problem could be small, but ignored small problems become bigger problems. We can help people avoid future pain both physically and financially by convincing them to come in now.



User Behavior

When someone has a vision problem, they will often go online and start looking for a solution. They'll end up on sites like WebMD or the Mayo Clinic, attempting to self-diagnose.

To do this, they usually begin with a search. Something such as "Pain in right eye" or "Can't see out of eyes".

In order to capture these searches, we have two main options:

Traditional SEO -

To rank for traditional SEO, we need a high authority site with a piece of content that is better than what WebMD and Mayo Clinic have on their sites. This is difficult to do, unless you have a huge marketing budget. Even with that, you'll capture a lot of traffic outside of your market (for example, if you're in Houston, you don't necessarily want traffic from Denver). Thus, this isn't usually the most cost effective solution.

Geo Targeted Search Ads -

This is probably the most powerful way to get in front of people looking for solutions. The strategy here is fairly straightforward:

- Create search ads targeted around "eye pain" or "can't see", but only target them to a limited area - again 10-20 miles around your location.
- Create a landing page (or series of pages) that highlight common eye problems as well as common causes and how your office can help. Then make a very clear call to action and use the landing page tips listed above.
- Depending on your market size, this will be a campaign that may not get a lot of traction, but often the leads you do get will be more complicated cases that can be more profitable to your business in the long run. Plus, you're helping people solve a real problem, and that feels great!



Once you've begun to capture this traffic, we can move onto the next group of people:

People who have a vision problem and aren't looking for a solution or people who don't yet have problems, but need a "check up"

I group these two types of people together because the strategies we'll use to target them are nearly identical, although the ad copy itself is different.

These are **low intent** users. That means they are not, at this moment, looking for an eye doctor. They are just browsing the web, on Facebook, or otherwise wasting time online. Your appearance on the website or in the newsfeed is then an *interruption*. They aren't expecting you, and would most likely ignore you if you don't employ a strategic plan. There is likely a subset of people that realize they need an exam and have been putting it off or have been ignoring that loss of vision or pain they're experiencing. These are the people we want to get ads in front of.

Instead of using intent-based advertising, like we did with SEO and Google Search, we're going to use Display and Social advertising. These are generally the type of ads that interrupt people as they go about their day, but we use them because they are effective.

How to Use Interruption-Based Advertising

You've decided you want to give this a shot. Awesome! The first step is to categorize or "segment" people into unique audiences and then put the right message in front of them.

Here are some examples of segments we can target using display and social media ads:

- Mothers with Young Children - If you do pediatric optometry, there's a huge opportunity to get the right message in front of moms. Some messaging ideas could be:
 - *Kids heading to school for the first time or back to school? Get an eye exam to help them succeed from day one!*
- Seniors - Marketing to seniors and baby boomers online can be extremely effective. We can do demographic targeting and put ads in front of people

within a certain age range. Seniors as a rule want to be perceived as young and vibrant. In fact, some research suggest that seniors mentally view themselves as up to 20 years younger than they actually are. So in your advertising, you want to use images of young, happy people. Ad copy ideas could include:

- *Stay active longer - Learn how a simple eye exam can help you live a better, more fulfilled life.*
- *You don't stop, your eyes shouldn't either. Keep them healthy with an eye exam.*

You could segment the audience into a dozen different groups and put unique audience targeting in front of them. There are virtually no limits on how to segment this. You could offer eye exams for athletes, outdoorsman, entrepreneurs, social workers, or any number of others.

WRITING A GREAT OFFER

A limited time offer can also help you close the sale. A 10% off coupon or a limited time offer for a free eye exam could help drive meaningful action for your practice.

Bonus Point: Free is always viewed as a good thing. Once someone comes in and gets a free eye exam, even if you lose a little money up front, you can often regain it through upsells of glasses, contacts, or other procedures the customer may benefit from. Don't be afraid to try your offer to capture the most revenue total, not just the revenue on the first interaction.

Here are some ideas that you can use for a killer offer:

- 10% off coupon
- Free X with purchase of Y (you select the items)
- Free parent exam with child exam purchase (or visa versa)
- Buy one pair of glasses get one free

Most importantly, you want the offer to be:

1. Valuable to the customer
2. Have scarcity (either limited time or a limited amount)

Pain or Other Issues:

You can also write ads that highlight pain or vision issues. This will likely do well targeted against a certain demographic of people - perhaps people in the 65+ age group. Combine this targeting and messaging with an offer above and you'll increase business.

RECAP

In this section we covered strategies that you can use to drive clients in the door today. We talked about how to target both high intent (search based) and low intent (display or social based) audiences and the nuances in each platform.

The fact is, every market and every person is unique. But our goal has been to help you map strategies that drive real revenue for your business in a competitive marketplace.

Unfortunately, there's only so far conversion can take you. What will take you to the next level is the ability to build a brand and position yourself as an expert in your field. Brand building is much "softer" than conversion marketing, but it can be just as valuable. And these two strategies are not mutually exclusive.

With that said, let's move on to...

Part 2:

Build Your Brand in the Community

Once you have campaigns that are focused on conversion, you'll see that they are humming along nicely and you're getting new customers from them. Now it's time to work on building your brand.

Before we move forward, it will be helpful to define "*brand*" a little. Marketers talk about "branding", but it isn't often clearly defined. Rather than try and define it from scratch, I'm going to give you a definition we can use here:

"Brand is the sum total of the experiences, perceptions, emotions, and influence that you, your product, and your company have on a consumer."

That's it! That's building a "brand". So, it's not about logos and color schemes (although having a nice logo doesn't hurt), but instead it's simply about the experiences, perceptions, emotions and influence you have. To "build a brand" simply means increasing the number and intensity of experiences, perceptions, emotions, and influence you have.

It's vital to remember that every interaction you have with a potential customer is an opportunity to build your brand. For example:

- When someone first sees your ad, you are building a brand.
- When they fill out a form to contact you, you are building a brand.

- When the phone rings and no one picks up, you are building a brand.
- When the receptionist is rude or short with a customer, you are building a brand.
- When your office is running late and doesn't see a patient on time, you're building a brand.
- When the patient can't get a clear answer on their bill or insurance, you are building a brand.

These are just a few of the dozens to hundreds of interactions that you'll have with your potential customers over the source of their lifetime. Each one of these is an opportunity to build your brand.

SO NOW WHAT?

Ok, now that we know that building a brand is important, what are some tactical, tangible ways to start building it? Here are some pointers on how to build out a great brand.



The Visual Brand

The Visual Brand may be what most of us think about when we hear the word "brand". This is mostly based on your marketing collateral, logo, emails, website, and any other visual marketing.

Visual brand is important, but don't spend too much time on it. There is no magic logo that is going to help you grow your practice. Maybe your logo is "cool" or maybe not, but it really doesn't matter that much.

As a rule of thumb, just make sure your logo isn't outdated or unattractive. If it looks like it came straight out of the 80s or 90s, it may be time to get a new one. If it doesn't look great on letter head or on a sign, it may be time to replace it.

Talk to a few designers, or better yet the patients within the demographics you're targeting. Get some feedback. If you find it's time for a change, make a change. The point is the visual brand is maybe 10% at most of the total brand.

In fact, what's more important than a great logo is **consistency**. A visual connection isn't just visual.

It's built out of the emotions and experiences people have with you. They simply attach those emotions to a visual cue.

The quintessential example of this is "Pavlov's Dog" - when Pavlov taught the dog to salivate by associating the ring of a bell with food.

The same experience of connecting visual cues can be built in your business. When customers see your ads, your logo, your building, your doctors, your admin staff, or anyone else, what is their association? Is it one of joy and positivity or of annoyance and frustration?

Your logo, colors, and overall design aesthetic become a representation or symbol that triggers these emotions (either positive or negative).

Thus, a visual brand is important, and on it's own will evoke some emotion. But more than anything, it's a vehicle. It's a **vehicle** that transmits the emotions of your brand to your consumers.

Reputation and Reviews

In addition to building a visual brand, another *major* factor in your success is your reputation. This matters both online and offline, but as it relates to your ability to market and acquire new clients, your online reputation is what we're going to focus on.

Your online reputation is basically your "reviews". If you've ever eaten at a new restaurant you found on Google or bought anything on Amazon, you've probably spent a good bit of time reading reviews of that restaurant or product.

Reviews are a powerful tool for consumers to express their pleasure or displeasure in brands and businesses. As a local business, you should pay close attention to your online reviews.

Although there are dozens of review platforms out there, in our experience there are three you should focus on the most. These are:

- Google
- Yelp
- Facebook

All three of these platforms include a review engine that allows users to leave feedback on your business. It would be wise of you to "claim your businesses" on each of these platforms. You can find the links to do that here:



- Claiming a Listing on Google
- Claiming a Listing on Yelp
- Claiming a Listing on Facebook

We talked about this a little in the SEO section above, but you want to stake claim on each of these websites. Next you want to set up alerts so that you get an email (or notification) whenever someone reviews your business.

In order to get your reviews in tip-top shape, there are a few things you need to do:

- Encourage Reviews
- Address Negative and Super Positive Reviews



Encourage Reviews

The first step is to get people to review your business. After all, you want real customer reviews and ideally you want more happy customers to review your business than unhappy customers. If only the handful of dissatisfied customers review your business, your online profile can quickly become overwhelmingly negative, despite you providing great service 98% of the time. That's not good for your business or your reputation.

How do you encourage reviews? Here are a few ideas.

ASK!

First off, you have to ask. Yelp, Google, and Facebook often provide

stickers than can go on your practice door. Add a link on your website where users can leave a review. Ask them in your follow-up emails or on social media. Whenever you can, you should ask. *

**Be Careful When Incentivizing*

This can be viewed as a bit of a "grey area" in marketing. Google, Yelp, and Facebook don't like it at all when you incentivize people to leave reviews. This would include things like providing coupons, discounts, or free services.

This can also actually be *illegal* according to the Federal Trade Commission. I'm not a lawyer and this isn't legal advice, but we certainly recommend talking to an attorney and understanding the risks

before trying to incentivize users to leave reviews. You're likely operating against the review site's terms of service at minimum, and possibly even violating the law.

MAKE CUSTOMERS HAPPY

The easiest way to get online reviews is to continually delight customers. Are your website and booking engine easy to use? Are your staff happy and helpful? Do you help make people's lives and insurance challenges as easy as possible? This sounds cliché, but happy customers often leave good reviews.

ENCOURAGE DIRECT COMPLAINTS

While you certainly want people to leave positive reviews, you also want to engage with angry or frustrated customers before they leave a negative review online.

One way to do this is to send a follow up survey or personal note via email. Typically you'll want this to be part of an automated process and you want people to know that you really care about their feedback. That means if anyone is less than thrilled with your performance, have one of your administrative staff or office manager reach out to them and attempt to understand what went wrong and how you can make them happy.

There are always a few people who will leave negative reviews to spite you, but by and large people just want to feel like they are heard. It is crucial that you and your team are listening to them and do your best to resolve their issues.

ADDRESS NEGATIVE AND POSITIVE REVIEWS ONLINE

When people leave reviews on these top three sites, you want to *address them*. Most of these sites allow you as the business owner/administrator to leave a response on the user's feedback. This is public and other users can see your response.

When responding to reviews, you typically want to include three things:

- Express Gratitude - Thank them for their business.
- Apologize (if it's a negative review) - If the user has a complaint, apologize for the issue. Tell them what you've done to improve the process and that you'd like to help them.
- Resolve if possible - Give negative reviewers a way to reach out to you (maybe a private email or phone number) so that you can help resolve the problems. Even if they don't change their review, this lets people reading the reviews know that you take complaints seriously and you want to help people get their issues resolved.

Remember, all your comments are public. Avoid getting defensive, AND avoid getting **offensive**. You NEVER want to attack a reviewer and you certainly don't want to blame them. Instead, simply offer to make it right.

You should always respond to negative reviews online so that potential customers know that you're serious about making things right.

Threat Reviews:

There is one class of reviews that may cause your business problems. These are threat reviews. Threat reviews are when someone calls your business and demands a free or discounted service or else they will leave a negative review online. This may sound absurd, but it does happen.

Here's how to handle these reviews:

- Don't give in. If someone does this once, they will do it again and you'll encourage bad behavior.
- If it really bugs you, talk to an attorney. There may be legal action you can take.
- When they leave a review, address it with something like this: "Hi [name], We've checked our records and we can't find a history of your visit."
- Call them out - This is a bit more risky and you should definitely talk to an attorney first, but you may say something along the lines of: "The only interaction we've had is when you called and said you'd leave a negative review unless we provided you a discount. Unfortunately, we don't provide discounts in exchange for reviews - positive or negative." ***This is risky, so use caution and always get legal advice before proceeding.***



POSITIVE REVIEWS

Although this is less important, it's worth noting that responding to positive reviews can be a great idea as well. Sometimes just a "Thanks for your business!" or "We love working with you!" can go a long way. And again, it lets other potential customers know that you're listening and willing to respond.

If you're silent, people will assume the most negative possibility. Therefore, address false claims and information sooner rather than later.

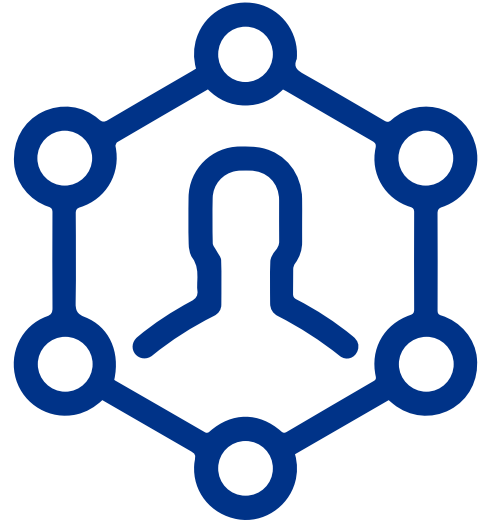
PR and Reputation

There have been dozens of books written on PR and how to manage PR - especially in a crisis. This ebook can't dive deep into those topics thoroughly.

However, there is a risk that I want to bring up. Many times businesses will get put in the crosshairs of a local newspaper or organization for something that they have done, said, or maybe even something that never happened.

If it's a single article, it will almost always pass without much notice. Often times it's not worth even mentioning or defending.

If it is something that really begins to pick up steam though, then it's almost always best to address it clearly, often, and loudly. The nuances here are beyond the scope of this article, but it's best to either apologize, double down, or attempt to clarify. If something starts to really "blow up", it's almost never a good option to let it pass without addressing it.



Reputation in the Community

In addition to the reputation of the organization, the reputation of the doctors and staff can impact the organization. It's essential that in addition to managing the organization's reputation, your staff know that their behavior can have positive or negative impacts on the organization.

This topic is in the realm of HR and legal and is not something we want to address in depth here, but it is something to keep in the back of your mind as you build your organization's reputation.

Part 3: Drive as Many Return Visits As Possible

Ok great! We're in good shape. By this point you know how to build out a funnel that drives new clients and leads via ads and SEO. You should also have a pretty good understanding of brand, reputation, and how to manage each well.

Now that we know how to get clients in the door, we need to focus on the most valuable part of marketing. The **most valuable part of marketing** is keeping current clients.

This is one of the most overlooked and underestimated parts of running a small business. Businesses will spend thousands, or even millions, on ads, banners, and other tools to acquire customers, but they won't build systems and processes that actually help them retain customers. So how do you keep customers coming back? How do you ensure that you're their first choice when they need you, and

that you are available even when they aren't planning a visit?

It sounds too simple, but the best answer is to **follow up**.

If there's one thing in your business you get right, it should be the follow up. Your ability to continue to connect with your customers after the sale and get them to **come back** to you is what separates you from your competition.

Why? Because if you're good at driving return visitors, you can outspend everyone else in acquiring new customers. That means you can invest more in marketing because each client can be worth way more to you than a competitor.

When marketers think about driving return visits, one of the most important metrics is **customer lifetime value**. The calculation is fairly simple: Add up all the money that a client will spend with you over their lifetime, and that's your customer lifetime value.

We've mentioned it already, but I want to bring it up again because it's vitally important.

Why does this matter? First, it matters because knowing this number allows you to know how much to spend on acquiring a new customer.

For example, if you make \$99 on the first exam with a customer, you may balk at spending even \$80 to acquire that customer. However, if you know that a customer is worth \$30,000 over the lifetime they spend with you, \$80 is a *bargain*.

But in order to get \$30,000 out of a customer, you have to be good at getting them to come back over and over again and spend money with you.

So how do you make that happen? We're going to break it down to **before, during, and after** the visit.

BEFORE THE VISIT

Before the visit, you'll want to get some basic information from them. You'll want to collect their email and put it into a system. You'll want to set up tools to remind them of their appointment. Maybe this is a manual process for your administrative staff or (even better) maybe it's an automated process.

We love automated processes so that there isn't much room for human error.

Automated text messages and emails are a great way to do this.

Send them a text reminder the day before their appointment as well as an email.

If your location is difficult to find or parking is difficult, help them out. Tell them how to get there, and have a clickable address that opens in Google or Apple Maps so they can easily find you.

Your goal is simply to get them there (so they don't cancel or forget) and help them have a great experience.

DURING THE VISIT

During the visit, you want to ensure the customer has a great and memorable experience. That's one of the biggest factors in ensuring that they return to your business in the future.

This obviously includes things like clean waiting rooms and a kind staff, but you also want to get information from them that you can use to market in the future. If you don't already have their email, you'll want to get that. You'll also want to get permission to text and email them in the future with other offers.

Now you may be thinking that this is where you want them to "Like" you on Facebook or "Follow" you on whatever social media platform is most popular right now, and there's no harm in that.

But ultimately, you want to get a **direct** link to the consumer via phone or email, rather

than simply getting them to engage with you on social.

Why? Because when someone likes your Facebook page, Facebook sits between you and your customer. They've updated their algorithm already so that almost none of your "Fans" see business posts on Facebook. So not only do you need to get them to like your page, but then you'll need to pay Facebook by boosting posts to reach them directly.

This can be a good part of your marketing strategy, but it's much less effective than having a direct line of contact.

Even though email inboxes can get crowded, it's still a better option than fighting against the noise of Facebook.

Finally, if possible, you want to rebook them before their next visit. Getting them on the calendar (even if it's 6 months out) can dramatically help with follow up.

AFTER THE VISIT

This is where you need to be **obsessive** about the follow up. You don't want to spam people, but you want to engage with them when they have needs. Although there are no perfect rules, here are a few guidelines we suggest.

- **Thank You Cards** - After the initial visit, you want to send out thank you cards. Ideally you want these to be from a staff member who actually interacted with the user. It doesn't mean you have to have staff handwrite cards (although that's a great idea), but if they saw Dr. Jones, you want the card or email to be from Dr. Jones. Generally we recommend a handwritten note in the mail as well as an automated email message.
- **Feedback** - In the thank you email, you also want to ask for feedback. You want to encourage people to be as open and honest as possible. Tell them you want to help them resolve any issues they had and you value them. Give them a chance to either reply to the email or fill out a simple help or complaint request. Then make sure that goes to a REAL PERSON who can follow up with them immediately and help make things right. This is a great way to help avoid negative reviews online.
- **Leave a Review** - If they were happy with their experience, you can also ask them to leave a review and include links to Google, Yelp, and Facebook. Tell them you value their feedback and your positive reviews helps their business serve even more people.
- **Follow Up on Milestones** - Birthdays are the most obvious milestone. Send a text, card, or email on birthdays. You don't have to include a coupon. You don't even have to ask them for the business or say "we hope to see you soon!" Simply wishing them a happy birthday goes a LONG way. I just recently had my birthday, and I know dozens of companies have it on file. I only got one note. That's a huge missed opportunity for a business.
- **Reminders** - Assuming you got a rebook after the first visit, you want to automate your reminder process. Most people don't put things in their calendar six months out, so make sure you remind them a week and then a day in advance of an upcoming appointment.
- **Rebook appointments** - If you don't get a rebook on the first visit, you want to make sure that you get a rebook when they are due for another appointment. The best way to do that is to connect with them when it's time to book the next appointment. Normally that means sending out a reminder card via email, a text message, and maybe even a phone call within the same week. Your goal is to get something on the calendar for them. Another tip here is to make it as easy to book as possible. For example, your text message could say something like "We have an appointment available at 1pm on Aug 27th. Would you like to take it? Click here to confirm" with a link that redirects them to confirm their appointment. Rather than forcing them to call you to book an appointment, you can make it as easy as a simple click of a button. And be sure you don't just send one follow up. Send them multiple messages until they either unsubscribe or they book. You want to get them back into your office again and again!

But this all takes so much time!!!

You are right. Follow up does take time. Thankfully, you don't have to do this all manually. You can automate this process.

If your booking engine can't send texts and emails as well as set tasks for your clients, then you need a new booking system. Although you might spend a bit more, these systems can turn a \$100 customer into a \$10,000+ lifetime customer.

If you want to succeed, your business needs to become a follow up **machine**. You have to be the best at following up and building an amazing customer experience.

Remember: Your goal is to optimize the lifetime value of a customer - not just get the first sale. The key to that difference is follow up.

NOW IT'S YOUR TURN

Wow, that was a lot of information! It might feel like you're drinking from a fire hose. Trust me, I get it. There's a lot here.

And doing this well takes a lot of work. It's not easy. And it's not for the faint of heart. **It is, however, exponentially vital to the success of your business.**

I've given you the exact marketing playbook you need to grow your practice. These tools implemented over time can turn your marketing from a "spray and pray" approach into a solid, predictable, lead generation machine. A business built on these principles will weather recessions and grow in both good times and bad times.

So now it's your turn. Time to take the knowledge you've gained and get to work. It's not enough just to read. You have to do it. The truth is, your competitors already are.



If you like what you've seen here and you want help putting systems and processes together that can drive recurring revenue for your business, feel free to reach out to me at tyler@optometrymarketing.com.

Now, it's time to grow your business. Go get started!

About Us

Tyler and Christine are the husband and wife founders of Optometry-Marketing.com. Christine is a practicing OD and Tyler is a marketing professional focused on growing practices. Together they launched OptometryMarketing.com after seeing the challenges facing practice owners in this competitive space.

Rather than leave owners to work with traditional marketing agencies (many of whom don't understand the unique needs of optometrists), they wanted to focus their efforts on working with owners and managers who want more revenue, more freedom, and more flexibility in their business.

