

## **Creating an Experience**

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ABO 1 credit hour General Knowledge

### **Course Description and Introduction:**

Today's consumers' shopping expectation has evolved from transaction-based to experience based. Your patient becomes a consumer, the moment they transition from the medical experience into the retail experience environment of your practice. And, as consumers, they want more from you. They want to have a memorable retail shopping experience. In this course, we will review the steps to create a curated retail journey that delivers a shopping experience that bonds the consumer to your practice.

This course addresses the evolving expectation of the patient visiting your practice. You consistently provide a great medical experience; it is now a patient expectation. But there is another side to your practice, and it is retail. It is here that patients become the consumer and it is here that they now expect more. The consumer retail journey is highly experience and brand driven. We will discuss harnessing the power of brands, creating the perfect frame assortment, and visual and vignette merchandising. It's about providing your patient consumer with a memorable shopping experience journey. But even the best brands can have their power diluted with clutter and chaos and poor visual merchandising. We will review the steps to creating the right space for brand power to come to life. So, how do we do all of this? It sounds pretty complicated, sounds abstract, right? But allow me to walk you through step-by-step on how we can create an in-store retail experience that resonates with you, the patient consumer.

### **Course objectives:**

1. To understand assortment, merchandising and display and what each communicates to the patient consumer about your practice
2. To understand how to curate the customer journey shaping their retail experience starting with an enticing window
3. To understand the importance of providing a fully integrated digital (clicks) experience to enhance the customer in-store experience

### **The Steps:** Insert *Image of seven steps*

We will review the steps required for the creation of a memorable retail experience;

Step 1. Frame assortment; why is this point critical? How will it enable you to deliver the experience and tell the product story? And, how does assortment define your retail image?

Step 2. Visual merchandising; this step addresses key concepts and design questions: How do I merchandise? By brand? By gender? What is right, what is wrong? Learn tips on how to merchandise to communicate with your specific consumer.

Step 3. Vignette merchandising; what it is and how will it enable you to tell the story of the specific brand and make the story resonate with your patient consumer.

Step 4. Frame display options: shelving or on a peg? We will address the difference between the two and how your patient consumers perceive each.

Step 5. Create a fully integrated digital experience.

Step 6. Maximize the windows of your practice that they represent the eyes of your practice.

Step 7. Analyze your dispensary; understand what is right, what is wrong, and how you can improve it to enrich the consumer shopping experience.

### **Curated Assortment:**

Brand selection for your dispensary is a very important decision. The right selection lends credibility to your retail brand story and shows your consumer how well you get them. It's going to express your retail image or identity, and it needs to create a very specific connection with the demographic in your area.

Now, after you make a choice on which collections are relevant for you, limit the number of collections to twenty. This number is not random it is based on marketing research. Each one of these 20 brands that you're going to choose to represent your practice, not only has to be carefully selected but has to be now carefully represented. You need to start to think about the architecture of these, the component of these specific brand.

The brand needs to be relevant. The brand needs to be very well represented to tell the story of the brand. So if it's a specific gender brand, let's say it is a brand that is only male or only female, you will stay focused on that specific category. I always suggest balancing the mix between optical and sun. Where 75% of the DNA of the brand is supposed to be optical and the rest in the sun, balance the different type of material between acetate, metal, rimless, three-piece mounting if that specific collection has that specific segment.

And when it comes to the number of frames to carry in each collection there is a critical mass that tells the story of the brand. When you ask your sales consultant, "What is the minimum order to be able to activate this brand?" I would say to you, "The minimum is too minimum if you want to sell that brand." Never buy a specific line to make a window display. Always buy a specific line to allow that specific line to become a profit center for you.

When it comes to numbers, I will not consider any brand with less than 30 or 40 units. This is the right balance of product to represent a brand. Also, as a buyer, you don't want to buy one of these or one of that. You always want to go in depth in color. I suggest no less than two different colors for each specific styles. See, today, specific styles tells a story, not only in the material but as you can see in these pictures, also in the lens story, especially if we're talking about sunglasses.

Create a good balance of brands with an assortment of each collection that represents the brand. Follow this guideline, to create an ideal assortment: chose best-sellers of each brand, circulate in new styles

from each brand as they will represent the latest fashion trends.

Invest in show-stopper statement pieces even though they won't sell every day. They're unique, they're different, and they create an impression. What do they say about the practice? They say that you have style for everyone even the Avant-garde. And, they can spark a conversation with your patient. And they set you apart from the crowd.

**Visual Merchandising:** *Insert image of branded display*

Merchandising by brand or gender which is right?

Well, let me see. If I merchandise according to gender it's easier for me because the ladies' are going to be on one side, the men's are going to be on one side, and it's going to be easier for me to direct my patient in this specific area of my practice. Nothing wrong with that. And for some of you, this may work, but I can tell you that, if you link the product to a specific brand, you have the opportunity to bring that specific product to life by leveraging the power of the brand.

Re-merchandise your practice in a way where you leverage brand power. Whichever brands you select merchandise them as a brand collection. Highlight the brand with a beautiful logo plaque right on the top to draw attention. You may want to merchandise the men's on one side, the ladies' on another side; unisex in the middle, and sprinkle the sunglasses along with the optical, to be able to tell a 360-degree story of the entire brand. Brands have power, think about the reason behind a brand's success. And, know that brand recognition plays an important role in providing patients with confidence in their purchase decision.

Leveraging the power of brand brings the frames story to life. Instead of a front with two temples, your patient sees a fashion accessory from a brand they know and trust.

**Vignette:** *Insert image of vignette display*

Vignette is merchandising that highlights a specific collection in your practice. So the collection stands out, and it becomes a destination point that draws the attention of and connection with your consumers.

As you can see here the highlighting or spotlight of two specific brands is evident, leveraging several components: an image, a logo, the curated assortment of the brand styles, mixing optical and sun, from dark to light for best visual merchandising. Vignette merchandising requires a dedicated space to showcase a brand, as you can see over here. The logo is at the top. Lighting spotlights the collections. Images create a connection with the actual brand. These are the key elements of visual merchandising.

And I suggest to create this type of environment, to bring the collection together, in this specific case, both collections are uni-gender. They're both a female collection, so there is no problem of mixing or dividing male and female. But if it is a situation where you are mixing both genders in this specific case, as I was mentioning before, you will have the men on one side, the lady on one side, the unisex in the middle, and the sunglasses sprinkling the actual display.

This type of concept is going to help you to create a very interesting, eye-catching type of optical environment, where from a distance, now you can spot a relevant brand in your practice.

My challenge to all of you is to walk in your optical dispensary, look at the optical dispensary from a distance, and in less than 10 seconds, my challenge is for you to be able to read the board and be able to tell yourself which collection do you carry in your optical dispensary. If the product is not relevant to you from a distance, it's not going to be relevant to your customers.

Now think about your optical dispensary. You may carry 600, 1,000 frames. Maybe even more than that. Think about the level of inventory that you have sitting in that optical dispensary. It is a shame if that product inventory doesn't jump out, virtually out of the display and screams for attention. "Look at me! Look how special I am!" Use visual merchandising and vignette merchandising to guide your customer on their shopping journey.

### **Displays - shelves versus a peg system:**

Which one is right and which one is more effective? I should also add, what is the actual perception that this type of merchandise creates in the eyes of your patient, your patient consumers?

A peg system is associated with a bargain product while a shelving system evokes a sense of quality and luxury product. Also, the peg system doesn't allow you to show the beauty of the aesthetics of the frame that in most of the cases is actually in the side of the temple pieces of an actual frame.

You can have a different type of peg system that you can use. The system displayed here in this image is a free-floating system that allows you to see the specific beauty of a frame and has a locking mechanism included. But I would strongly suggest you implement the strategy where all of your best product, all of your quality product, all of the product that you're trying to highlight is displayed on an open shelving system. On a shelving system, you may decide to use a different type of Plexiglas pegs that can hold two or three different pieces as long as the temple work of an actual frame is a specific display in a proper manner. I will not discount the peg system to merchandise value product or entry level product so you can create the perception that you are affordability if your goal is to communicate to your patient that you are strictly luxury and an ultra-luxury environment I suggest a shelving system and only a shelving system.

### **To lock or not to lock?**

The big question, do we lock the inventory or do we leave the inventory open? Some of us do not have an option; we have to lock the inventory. But there is no doubt that an open shelf system, it's a better system that invites the patient to explore and experience the frames.

Now if you're trying to increase profitability and upsell, then don't create a roadblock by locking the product. A product that is locked restricts the consumer's freedom to explore and is disruptive to their in-store journey. I would suggest you invest in a monitoring system instead of locking the product. If you must lock product lock, all of the products. In this photo some product is displayed on pegs, on the right. And on the left, you can see an example of an environment where everything is merchandised on shelves, and everything is an open sell.

## **Create a fully integrated digital experience:**

Multi-channel what does this mean? It means creating a retail environment where digital tools evolve the consumer's expectation allowing both the feel and touch experience of actual product combined with enhanced demonstration and metric gathering digital tools; creating a fully integrated digital experience. The product experience is digitally enhanced, it comes to life for the patient in many ways. First of all, in this digital screen, you can build a fully integrated digital catalog to be able to overcome and align type of projection, offering to your patient a different option of colors that you may not have available in your full inventory. Now, all of a sudden, that takes your optical dispensary to the next level, enhancing the presence of the product from whatever you have today. It can be 700, 100,000, and even if you have a lot of product. Let's say 1500 different facing, to virtual infinity: the opportunity to have the availability of 1,000, thousands of different style option. But, it's so much more than that. Imagine the opportunity to upload in this digital screen, a full learning center, regarding [planning 00:01:21] the storytelling, with videos, power point presentation, images as a slideshow. With the traditional POP, the posters, the banners are today an obsolete type of a technology fully replaced by digital technology that it can be refreshed an uploaded digitally in just a few seconds.

What about a learning center? What about a fully integrated digital learning center where your patient can learn about new digital lens technology, for example. Enhance your patient experience through education and information supported by a digital demonstration tool. Imagine being able to use this technology, to be able to do demonstrate polarized lenses, showing your patient the different lens colors and all of the different, cool, unique coatings that today are available in the marketplace, and how those specific coating or lens enhancements can address the lifestyle's needs of that specific patient. Providing a fully integrated digital experience enriches the customer journey. It's a must if you want to elevate the experience of the consumer's patient. Remember their expecting more from you.

## **Personal service: They can't get this online!**

I know that this is a topic that concerns you and every single day. So we need to educate them on the reason why they should buy from you, instead of going online.

Not only can you create your online store but you can leverage it for a digitally enhanced patient experience in-store. With currently available iPad based software, you can offer your own online store experience complete with inventory and brand images. This can be utilized to expand the patient's in-store choices to include your online selection. Well, we have to do that in a very non-intrusive way, and this means using education. So put your education hat on, because you are a professional, and let's learn it together on how to be able to overcome this specific objection. So let me roleplay with you and let's choose Suzy, as an example." Susy, I see that you're looking this brand x black frame, we have other options in colors and other similar styles choices. At this point, hand the iPad or tablet to Susie. As soon as Susy is engaged in browsing you have elevated her in-store experience to memorable experience that stands out from any other she's had before. Susie finds the frame in green and wants to see it. You check the availability in your online store. "Fantastic. The frame is available. We can have it in our practice in three business days.

**Educate:** *Insert image of learning center*

I notice that you have a vision health insurance benefit. Your vision benefit will save you about 40% of the price of the frame, and the lenses. Now, Suzy, you need to know that you cannot use your vision benefit when you go shop online. But since you are in our practice, even though we're looking at the product in our online stores, I'm able to process your insurance benefit, and save you that 40%. It's good that you came in to see us."

By the way, thank you for your loyalty. We appreciate you being our patient for so long, and it's important that you know that we value you and your patronage. Suzy, let me have your credit card. We're going to put in a little security deposit, and as soon as the frame comes in, I'll let you know, and we'll do all of the measurements for you. Thank you, Suzy.

**Maximizing the windows to grab attention:** *Insert Image of window display*

The windows are the eyes of your practice. The key is to capture, engage the passing consumer whether walking or driving with an intriguing attention-grabbing window presentation for a consumer that is walking or driving by. In a contest of creating a window of the display, it's very important to keep it simple. So please don't overcrowd your window display with seasonal material like a Christmas tree or eggs for Easter or leaves for fall. Please do not put a tower on the window with the actual product. The window is designed to tell the story of one brand with just a few styles because you're not only going to sell the product that you put on the window. It is designed to attract. You don't want to give the story away at the window. You want to intrigue the consumer's to wonder what is going on inside the practice.

This is a typical example of a beautiful, minimalistic window display. You want to change your window every 30 days to keep the excitement. You almost want to build the stories about your patient coming to see your window every 30 days to wonder what you have different, what are the new things that you carry in your practice. It creates a lot of excitement if it's done and maintained properly.

**Let's practice:**

I would love for you to implement two or three techniques that you learn today and to that end let's look at some examples together of and analyze how one or more of these techniques will enhance the patient consumer experience in your practice.

**Example 1** *Insert Image of window display*

Now you can be in a medical environment; you can be in a shopping mall, you can be in a shopping plaza, whatever you are the window display is always relevant because the window is the eyes of your practice. And as such the windows are supposed to attract, communicate and engage the walk-by or driving consumers. Windows should entice consumers to eventually come in to become your patient and eventually your patient consumers. What do you see when you look at and through this window?

Looking at this window display, you see three stories of three specific collections highlighted by the images and just a sprinkle of a product; not too much product, just enough to be able to entice. One thing that is probably missing from this window is what? Well maybe a logo, right? To be able to tell

which specific product you have in your practice. On the window, I like to see the brand logos of all of the different collections that you carry in your practice. Maybe on one side of the window, done in a very nice and elegant way.

Another thing that I like about this image is the fact that it is see through. You can see the practice from the outside. Imagine at night time when you leave the lights on what kind of a beautiful effect this kind of a window display can have.

**First impressions and the guided journey:** *insert image of view upon entering*

As soon as you walk into this space, you want to have an immediate connection. The first impression is the key. You want to set up an environment where the person that is working behind the welcome your patients with a warm, welcoming smile, engaging with them and making every single patient feel special. Showing them that you are pleased that they came to see you or, even better, came back to see you again. Never take anybody for granted. And if you do not start the experience with a smile, you're not going to finish the experience with a smile. The first two minutes will set the tone on everything.

**The right side dispensing station:** *insert image of dispensing station*

In this photo, you see the right side of this practice, as soon as you walk in. There is a full layout of the product on the wall and three dispensing stations.

There are several things that I like. First of all, the pristine condition of the environment. See how clean and organized this specific area is, where there is a cabinet with drawers where you can put all of your stuff. There is a desktop and a mirror — nothing else on the table. And it should be that way.

But what is missing in this experience? What I would like to see in the practice of the future, I would like to see a high top table, to be able to create a connection in a way like you feel when you go to an Apple store, right? Where in some cases, you don't need to sit down with the patient to do a consultation or a dispensing. Especially if you're dealing with the millennial type of patient, it now becomes a more engaging, one-on-one type of experience. It's almost like a digital bar where you can have a digital asset on this digital bar, and you're standing, and you're having a conversation with the patient.

My suggestion is to integrate both options to be able to accommodate the different need of the different type of patient consumers.

**The Kid-Friendly section:**

Okay, now we're looking at a different segment of the practice. This segment is dedicated to kids. So let's look at these. Now let's think about your kid's segment of your business, and let's think about ideas on how we can further evolve this type of experience. Analyze your kid's segment, are you specializing in pediatric optometry? Is this relevant for you? If not, most likely, it is between 5% to 7% of your overall business. If you have one thousand frames dedicating 5% of your business to the kid's segment is 50 frames. Now is it relevant to dedicate an entire wall of your practice to 5% of your business? Or maybe we can keep this product in drawers on one of this cabinet that we saw before on wheels to be able to create a more of a custom-tailored type of approach.

### **The journey from patient to consumer:**

Now we're done with the medical examination, and the doctor is walking the patient in the optical dispensary. Throughout the entire practice, the patient consumer can see images of the product. As a patient consumer am I engaged in the experience? When I walk into the optical dispensary, what do I see and what will my experience be?

**Summary:** *Insert aerial view of horseshoe dispensary*

Okay, folks. We're at the end of the journey. We can see the aerial view of the actual optical dispensary. This is the traditional horseshoe type of dispensary setup. I strongly suggest this type of setup because it gives the opportunity to the patient to go to the journey whereas soon as you come into the practice, that the optical dispensary is in the front.

As you can see, the size of the optical dispensary is significant, represent at least 50% of the square footage of the actual practice. So 50% is retail, 50% is dedicated to medical and administration space. And as you can see, when the patient comes back from the eye examination, they're immersed in the optical dispensary.

I hope you to take away three things that you implement today.