



# A Step-By-Step Guide To Planning And Executing A Successful Patient Appreciation Party

*Vision Source*<sup>®</sup>  
SIGNATURE EYE CARE



# PATHFINDER FOR A SUCCESSFUL PATIENT APPRECIATION PARTY

Patient appreciation parties can be wild successes or total disasters. Here is an easy to follow, step-by-step guide to planning and executing the perfect patient appreciation party.

## WHAT IS A PATIENT APPRECIATION PARTY?

A patient appreciation party is a special event held only once, yearly, or several times a year. It showcases the entire office and staff, especially the optical area. These parties usually have a theme, one or two featured frame vendors, and provide an opportunity for everyone involved to have a fun (and profitable) day.

After deciding to host a patient appreciation party, it is important to establish a team who will start preparing for the big event. Whether it is a doctor or a key staff person leading the party team, someone needs to be in charge. If there are enough staff members, having a team to work with can not only spread the work around but can also be more creative and fun. The leader sets the expectations and tone for the event, assigns tasks, holds team members accountable and keeps everyone focused.



## Patient Appreciation Party Timeline

Begin working on the details (day, time of day, etc)

**12**  
WEEKS  
PRIOR

Create an invitation, flyers, and signage

**6**  
WEEKS  
PRIOR

Increase the activity on the practice's Facebook & Twitter accounts, begin newspaper and/or radio plans, and mailer flyers & invitations

Decide on food and beverages as well as attire for the staff

Hold a team meeting to go through a checklist to catch any omissions or necessary changes

**2**  
WEEKS  
PRIOR

Do the event metrics  
Meet with the team to review  
Send thank you notes

**AFTER THE PARTY**

**10**  
WEEKS  
PRIOR

Choose a theme and develop sales & promotional ideas

**4**  
WEEKS  
PRIOR

Organize the advertising and address mailings & flyers

**THE PATIENT APPRECIATION PARTY!**

Get the team together an hour prior to review goals, duties and remind everyone to smile & have fun!



## THE BIG PICTURE

Setting a time line is critical to effectively managing any event. For a patient appreciation party, begin working on the details **12 WEEKS** prior to the time of year you have chosen.

It is best to schedule a patient appreciation party during a slow period in the business cycle, enhancing profitability and allowing more time to handle all the details. The most successful parties occur in the spring and/or fall, but some practices prefer a summer date if the focus is sunglass sales. Choose a day of the week that fits the practice and staff schedules best. If your practice is in an area with foot traffic, Saturday is an ideal day. If it is in a medical or professional building, a Wednesday or Thursday afternoon and evening may work better.

Optimal hours on a weekend are 10:00 AM to 2:00 PM, whereas the best weekday hours are 2:00 PM to 6:00 PM or 4:00 PM to 8:00 PM, depending on whether or not your practice is open evenings. Limiting a patient appreciation party to four hours keeps it well-paced and encourages active purchasing.

**10 weeks** before the patient appreciation party, choose a theme. Let the creative juices flow and make lists of ideas without editing. Themes can be simple or exotic, with the best ones being fun and exciting for staff and attendees alike. Some simple themes include sunglasses, back-to-school, holidays or sports. More elaborate themes can include current or old movies (Pirates of the Caribbean, Disney), the Roaring Twenties, a Hawaiian luau, etc.

Also select the frame vendor or vendors that provide your practice with the bestselling frames and are requested the most by patients. Choose vendors who offer the best profit margins and can also help with door prizes, food, beverages and sponsorship/marketing dollars. It is wise to have no more than four frame vendors, and two vendors is ideal.

Likewise, at the 10-week mark, develop sales and promotion ideas for the patient appreciation party. Some ideas include:

- **Offer single vision lenses free with a frame purchase.** Patients perceive this as being a high value promotion but the practice cost is minimal. It also increases the sale of lens add-ons, such as A/R, scratch resistance and blue light protection.
- **Raffles!** Hold a raffle at intervals during the show with a grand prize drawing at the end.
- **Discounts and Add-Ons.** Write various discounts, lens add-ons or prizes on slips of paper and put them into balloons. Attendees can pop a balloon to reveal their prize.
- **Prizes!** Build or buy a “Wheel of Fortune” wheel with colors representing various prizes.
- **Gifts!** Offer a gift with each purchase.
- **Social rewards.** Give a prize or discount to patients who “like” the event on Facebook.



10  
WEEKS  
PRIOR



## SELL THEM ON THE DESIGNERS, PROMOTIONS, AND BUZZ

At **week 6**, create an invitation, flyers and perhaps signage. Some practices find it effective to mail their patients invitations while other practices have better results using their Facebook page, Twitter and email messaging using services such as WebSystem3 or DemandForce.

Don't forget to advertise the patient appreciation party on the practice's website. Design flyers or emails to be short and simple. Include the date, times, featured brands/collections and promotions. It is relatively easy and inexpensive to have colorful posters made up to display around the office as well. These can be displayed in lobbies, the optical area and in windows. In some areas, newspaper or radio advertising works well to reach desired market segments, whereas in other areas it is best to purchase a mailing list custom tailored to the desired demographic characteristics.

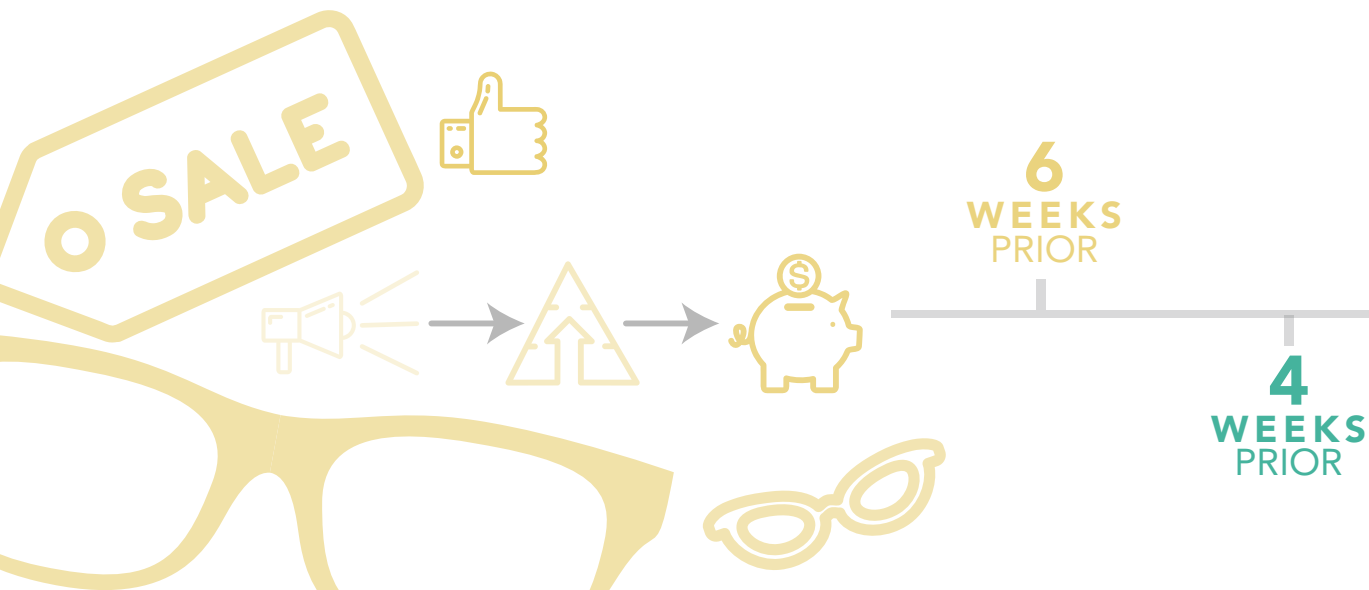
Portable black signs can be very effective in front of a building or on a highly traveled street. They can be rented by the day or week in most areas.

Encourage the staff to use word-of-mouth marketing by telling patients, friends and family about the upcoming big event. Get the staff involved and excited!

Assign a team member to take pictures of the party to put on the practice's website and Facebook page before and after the event.

When **week 4** arrives, organize the advertising and address mailings and flyers.

Use the practice's management software to invite key patients who have made significant purchases in the past. Notify patients with an upcoming appointment about the patient appreciation party, enticing them to think about new eyewear. Encourage patients who need exams to make appointments so they can use their newest prescriptions when making a purchase. Post event updates on Facebook and Twitter. Train staff on the features and benefits of the brands that will be displayed and available at special pricing during the party. Ensure that frame displays and optical décor are clean, fresh and inviting.





## PUBLICITY

At **week 2** before the event, increase the activity on the practice's Facebook and Twitter accounts. Begin newspaper and/or radio ads if they are a part of the overall marketing plan.

Mail the flyers and invitations that have been created and printed, and send electronic marketing messages as well. Consider having staff make personal calls to the practice's best patients and optical customers using a script for guidance. Keep a phone log, and set a goal of 10 to 20 calls per day. Be sure to also invite contact lens patients to come in and shop for backup glasses, computer glasses or sunglasses.

When booking examination appointments for the date of the party, try to concentrate on private-pay patients and those with better insurance plans. Try to limit the number of non-examination patients, such as contact lens checks or follow-up visits.



Assign a staff member the responsibility of taking pictures and updating social media to promote the party.

Followers will be reminded about the event and may share it with their friends.

**Tip** – Download social media graphics from the Marketing Toolkit to promote your event.

**2**  
**WEEKS**  
**PRIOR**





## PRESENTATION IS EVERYTHING

Decide on the food and beverages that will be served during the patient appreciation party. Cookies and punch work well for afternoon parties, but appetizers and wine may be a better choice for evening events.

Be creative and have fun with your choices, perhaps tying them into the theme if possible. Music can also be an important element in creating the right ambience during the patient appreciation party, again matching it to the theme if possible.

Spend some time coming up with ideas for how the staff (and even the doctor) will dress during the party. Theme-related clothing adds to the aura of fun and encourages the staff and guests to participate in the planned activities.



**2**  
**WEEKS**  
**PRIOR**

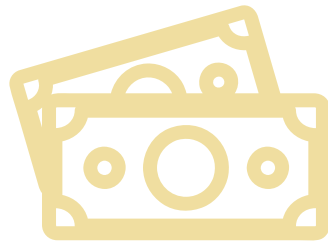


## PARTY FLOW

**Week 2** is also a good time to have a team meeting to review what has been accomplished and make sure everyone is on the same page.

Go through the checklist to catch any omissions or necessary changes. Get additional ideas that may have developed – use the creativity of the team to get them excited and make the patient appreciation party a stellar event. Be sure to review who is responsible for what in the final preparations and on the day of the party. Set a reasonable sales goal that is understood and embraced by the leader and staff.

Consider rewarding the staff, and perhaps even the sales reps, for exceeding the goals and having a record sales day. While praise is essential and always well-received, the motivation of a sales bonus can add extra excitement and commitment that can carry forward into heightened staff morale.



**2**  
WEEKS  
PRIOR





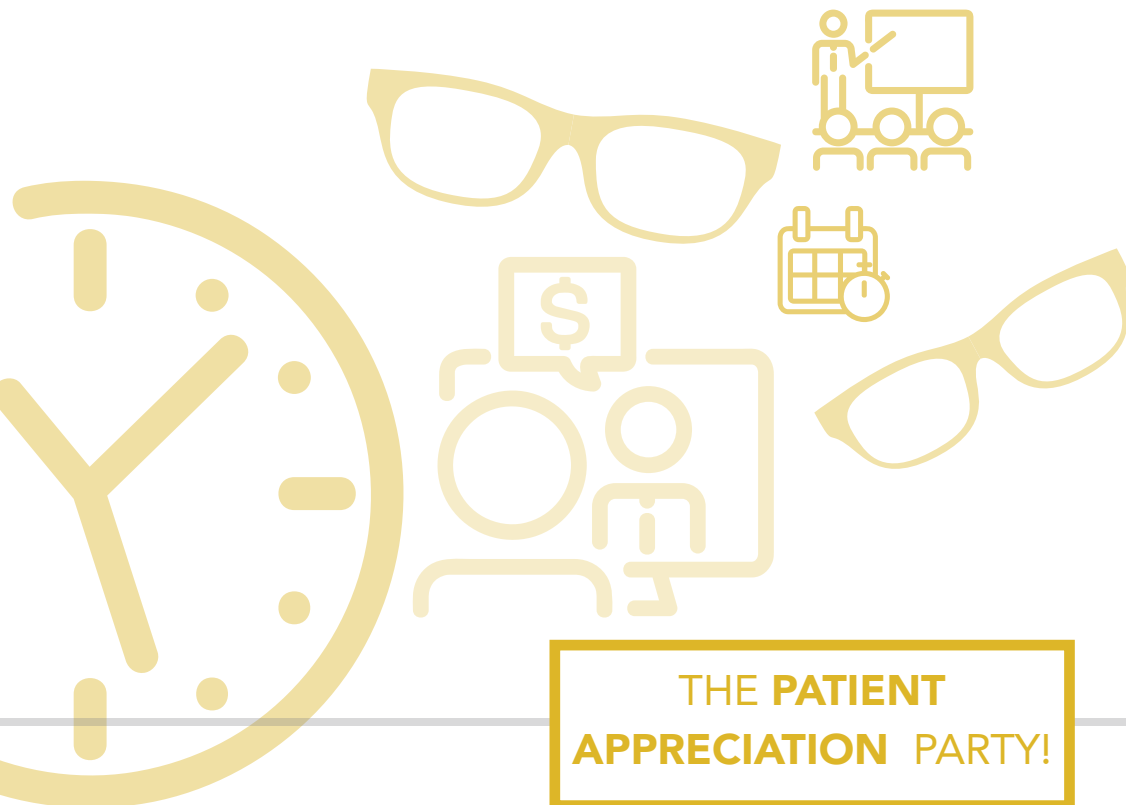
## EVENT DAY

Get together with the entire team and the frame reps an hour prior to the patient appreciation party. Review goals, review duties, and remind everyone to smile, interact with patients and, most importantly, have fun.

Go over the sale specials and prizes and have the reps review the features and benefits of their frame lines.

Many patients have insurances or eyewear plans that provide discounts on glasses. It is critical to decide ahead of time how to properly take care of these patients during a patient appreciation party. It is recommended that discounts be applied to frames only, and in the event the patient has a benefit toward a frame,

the better of the two discounts (frame show vs. insurance) is applied to the purchase. This policy should be clearly stated in all marketing and advertising that is done to promote the party to avoid misunderstandings on the day of the event.



**THE PATIENT  
APPRECIATION PARTY!**





## PAYMENT POSSIBILITIES

Offering payment options for those purchasing eyewear at a patient appreciation party may assist in finalizing transactions and increasing sales.

Let patients know up-front about special financing arrangements. Vision Source Members have a distinct advantage when offering CareCredit for their patient's purchases.

As with any well-planned event, things do not always go as expected. Stay calm, smile and make the best of the day. Maintain an up-beat attitude: it is infectious! Be sure to compliment

staff for their work, especially in front of patients. Keep a list of behaviors or elements of the event that could be improved upon for a later review – do not comment on them during the day.



**THE PATIENT  
APPRECIATION PARTY!**



# AFTER THE PARTY

Do the event metrics:

- **Determine the cost** of the event (food, advertising, decorations, materials, etc.);
- **Record** the sales;
- **Compare** with the revenue of an "average day";
- **Evaluate the approximate time** spent per patient for each transaction;
- **Evaluate discounts** and insurances utilized;
- **Determine the effectiveness** and sales of each frame representative.

Have a short meeting with the team to review the day. Discuss the entire process, making notes of what to do - and not to do - for the next patient appreciation party. Celebrate everyone's accomplishments, praising them for their efforts.

Send thank-you notes to the frame vendors who participated and to the patients who made purchases at the patient appreciation party. Consider including a comment card for feedback about the party that will help in creating better future events. Keep the list of attendees – they are potential guests at the next patient appreciation party.



