



STATE BOARD OF OPTOMETRY
 2450 DEL PASO ROAD, SUITE 105, SACRAMENTO, CA 95834
 P (916) 575-7170 F (916) 575-7292 www.optometry .ca.gov



Continuing Education Course
 Approval Checklist

Title:

Provider Name:

- Completed Application
 - Open to all Optometrists? Yes No
 - Maintain Record Agreement? Yes No
- Correct Application Fee
- Detailed Course Summary
- Detailed Course Outline
- PowerPoint and/or other Presentation Materials
- Advertising (optional)
- CV for EACH Course Instructor
- License Verification for Each Course Instructor
 - Disciplinary History? Yes No



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CONTINUING EDUCATION COURSE APPROVAL APPLICATION

\$50 Mandatory Fee

Pursuant to California Code of Regulations (CCR) § 1536, the Board will approve continuing education (CE) courses after receiving the applicable fee, the requested information below and it has been determined that the course meets criteria specified in CCR § 1536(g).

In addition to the information requested below, please attach a copy of the course schedule, a detailed course outline and presentation materials (e.g., PowerPoint presentation). Applications must be submitted 45 days prior to the course presentation date.

Please type or print clearly.

Course Title WHAT MOTIVATES, CHALLENGES, AND INFURIATES YOUR PATIENTS HOW DO YOU MEASURE UP AND HOW CAN YOU IMPROVE	Course Presentation Date 03/07/2017
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Course Provider Contact Information

Provider Name Renee Jacobs Kathleen (First) (Last) (Middle)
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Provider Mailing Address Street 4356 Castlerock Drive City Blaine State WA Zip 98230
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Provider Email Address dr.reneejacobs@yahoo.com
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Will the proposed course be open to all California licensed optometrists?	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
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Do you agree to maintain and furnish to the Board and/or attending licensee such records of course content and attendance as the Board requires, for a period of at least three years from the date of course presentation?	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
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Course Instructor Information

Please provide the information below and attach the curriculum vitae for each instructor or lecturer involved in the course. If there are more instructors in the course, please provide the requested information on a separate sheet of paper.

Instructor Name Renee Jacobs Kathleen (First) (Last) (Middle)
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License Number Colorado 1542	License Type inactive
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Phone Number (720) 635-9998	Email Address dr.reneejacobs@yahoo.com
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I declare under penalty of perjury under the laws of the State of California that all the information submitted on this form and on any accompanying attachments submitted is true and correct.

Renee Jacobs O.D. M.A.
 Signature of Course Provider

December 13, 2016
 Date

What Motivates, Challenges, and Infuriates YOUR Patients How Do You Measure Up and How Can You Improve

There is a link between improvements in the patient experience and measurable business outcomes such as increasing recall effectiveness, capture rate, and optical sales. With a team approach, management area leaders - including optometrists and opticians, can proactively initiate continuous improvements. As a result, gross revenue per comprehensive routine examination will increase. Capture Rate and Multiple Pair Sales will increase too.

AGENDA:

OPENING REMARKS

UNDERSTANDING CAPTURE RATE

Capture Rate Quiz

Business Practices Linked to Capture Rate

PATIENT SATISFACTION

End to End Clinical Journey

Patients Decide When to Seek Care

Patients Decide When and Where to Purchase Eyewear

STRATEGIES TO MEASURE UP

WHAT INFURIATES PATIENTS

Measureable Practices for Improvement

MULTIPLE PAIR SALES

Multiple Management Areas Can Message and Measure

More Tools and Strategies

DISCUSSION AND CALL TO ACTION

Course Title: WHAT MOTIVATES, CHALLENGES, AND INFURIATES YOUR PATIENTS
HOW DO YOU MEASURE UP AND HOW CAN YOU IMPROVE

Application to: California State Board of Optometry

Sponsoring Organization: Learning Empowerment Center (LEC) **Course Date:** March 7, 2017
Course Time: 7 pm – 8 pm

Sponsor Representative/ Course Provider Contact Information:

Renee Jacobs O.D., M.A. 720 635-9998
4356 Castlerock Drive
Blaine WA 98230
Renee@PracticeManagementDepot.com
www.PracticeManagementDepot.com

Speaker: Renee Jacobs O.D., M.A. **SS# (last 4)** 5233

Course Classification: Practice Management

Course Length: 1 credit hour, 55 minutes

Intended Audience: This course is appropriate for all doctors, opticians, and support staff in an eye care business that provides eye examination services and sells prescription eyewear too.

Teaching Methods: Content is delivered through live lecture, Power Point, handouts, and worksheets.

****Upon approval of the live course, the sponsoring organization, LEC, will request authorization to use the same content and resources for live online small group classes using GoToMeeting (GTM) with screen share and video conference. This will not be a webinar with participant chat. Instead, every participant is present on webcam to video conference with the instructor, and every participant can speak freely over a conference call phone line. With GTM, participants can see all attendee and instructor faces on web cam plus the presenter's computer screen Power Point too.**

If possible, please share requirements for obtaining authorization to provide CE for California State Board of Optometry online, small group, classes.

Brief Summary: Participants can link improvements in the patient experience with measureable business outcomes such as increasing recall effectiveness, capture rate, and optical sales. With a team approach, management area leaders - including optometrists and opticians, can proactively initiate continuous improvements. As a result, gross revenue per comprehensive routine examination will increase. Capture Rate and Multiple Pair Sales will increase too.

Objectives:

1. Participants can connect Patient Satisfaction to Measures and Metrics throughout the entire clinical journey. Participants can explain common business measures for key management areas including scheduling, reception, pre-test, examination, optical sales, dispensing, and follow-up.
2. Participants can define some of the most common metrics used to describe the overall health of an optometric practice. These include, but are not limited to:
 - Gross Revenue per Comprehensive Routine Eye Examination
 - Complete Exams per 100 Active Patients
 - Spectacle RX Capture Rate
 - Anti-Reflective %
3. Participants can explain at least 4 factors that can increase Gross Revenue per Comprehensive Routine Eye Examination.
4. Participants can explain the process for identifying relevant short term measures, any time a management area desires to improve customer service and then measure and report the outcome.
5. Participant can describe and explain how business decisions can impact Spectacle Lens Capture Rate. These include changing prices, modifying patient education about premium products, and improving customer service with targeted messaging from end to end during a patient's clinical journey.
6. Participants can share at least 3 ways to increase multiple pair sales.

Time Referenced Outline

5 Minute: Introduction

15 Minutes: Understanding Capture Rate

- General Definition
- Capture Rate Quiz – Interactive Activity with Discussion
- Specific Measure Applicable to Optical Lens Sales
 - Define Spectacle Lens Capture Rate
- Business Management Factors that can Influence Spectacle Lens Capture Rate
 - Changing Fees
 - Market and Economy
 - Patient Education Strategies
 - Customer Service Messaging/Communications

5 Minutes: Determining Factors That Most Strongly Influence Patient Satisfaction

To identify factors that most strongly influence patient satisfaction, providers must accurately understand the end-to-end patient journey, from pre-exam scheduling and testing all the way through until picking-up spectacles or contacts in the dispensary, plus any follow-up care. In addition, it is important to understand the role that price, service offerings, referrals, and brand play when patients decide *where* to seek care, plus *when and where* to purchase corrective lens products.

10 Minutes: Strategies to Measure Up

Every management area has indicators specific to their primary role in the business, plus success indicators of overall business performance such as Gross Revenue per Comprehensive Routine Eye Examination.

- Review of typical business measures: management area by management area - end to end for a typical patient's entire clinical journey. These include:
 - Scheduling/Recall Measure: Appointments Booked per Existing/Prior Patient Recall
 - Reception Measure: Comprehensive Exam No Shows per Comprehensive Exams Booked
 - Exam Measure: Eyewear Prescriptions per Comprehensive Exam
 - Optical Measure: Spectacle Lens Pairs Sold per Comprehensive Exam
 - Dispensing Measure: Accessory Sales per Eyewear Dispense

- Practice creating appropriate short term measures for solving some typical situations that infuriate patients.
 - Patient *did not bring* their sunglasses to the appointment, because the eyewear is perceived to be functioning well during frequent use. Patient reports vision is good and sunglasses effectively cut glare. Two days after their eye examination, a sunglass eye-wire screw loosens such that that the right lens falls out.
 - What can an office do better, in terms of habits and protocol, to prevent patient dissatisfaction like this?
(Answer: Multiple management areas can help. Appointment reminder call can include messaging "Bring every pair of glasses that you own or use." Reception can ask for all eyewear at same time requesting medical card and review of history forms. During any sale, patients can be reminded that eyewear needs occasional tune up for best possible fit and comfort....
 - What is an appropriate short term measure that will prove effectiveness of the improvement in customer service?

(Answer: Each solution above can be measured and reported.)

- Engage the audience identifying recent situations of infuriated patients. Then select one or two relevant cases and create the appropriate strategy(s) plus measure for improving customer service.

10 Minutes: Strategies to increase success - in every management area - *specific to increasing multiple pair sales.*

- Each Management Area Can Have Their Own Capture Rate: One measurable responsibility that moves each patient toward making appropriate *multiple-pair* purchases at the point of sale:
 - Appointments/Reminder Call
Measureable Responsibility: Remind patients to bring their medical card, list of medications, *and every pair of glasses they own or use.*
 - Reception
Measureable Responsibility: Ask each patient for their medical card, list of medications, *and every pair of glasses they own or use.*
 - Pre-Test
Measureable Responsibility: Gather information about the use and patient satisfaction for every pair of eyewear. Help patients understand when it is time for replacement due to changing prescription, scratches in lenses, damage to frame, or the patient's desire for a new style/appearance.
 - Examination
Measureable Responsibility: Make specific multiple pair recommendations.
 - Optical
Measureable Responsibility: Make specific multiple pair recommendations.
 - Dispense
Measureable Responsibility: Make specific multiple pair recommendations.
- The Optical Management Area has additional sales indicators specific to success moving patients into owning multiple pairs – even if purchase pattern changes from one pair every 3 years to one pair every year.
 - Lens Revenue per Month – global indicator for additional sales of multiple pairs or premium lens materials
 - Polarized Pairs per Month – indicator of multiple pair sales
 - Computer Lens Pairs per Month – indicator of multiple pair sales

10 Minutes: Summary/ Q & A/ Call to Action

- Study Your Key Indicators for Each Management Area
- Monitor Your Spectacle Lens Capture Rate
- Try Some New Tools and Tactics Throughout the Office:
 - Measure Individual Capture Rates per Management Area
- Try Some New Tools and Tactics in Exam Room & Optical Dispensary:
 - Create Illustrated Optical Treatment Plan

- Track Your Sales and Modify Images and Messaging to Achieve:
 - Immediate Increase in Premium Product Sales
 - Over Time, Increasing Multiple Pair Sales
 - Over Time, Increasing Spectacle Lens Capture Rate

Author's Affidavit:
I hereby certify that the course submitted is my original work and the material contained within it is current.

Signature of Author Reece Jacobs Date 12/16/2016

Quiz: Understanding Capture Rate

Occurrence	What Happens to Spectacle Lens Capture Rate?		
You convince a patient to schedule her 3 grade-school aged children for routine eye examinations, even though all have perfect 20/20 vision.	Up	Down	Need More Information
You convince a patient with perfect vision, to return annually, due to a family history of glaucoma.	Up	Down	Need More Information
You persuade more patients to return for annual well examinations, though most purchase new glasses every two to three years.	Up	Down	Need More Information
You persuade a patient to buy prescription sunglasses for the first time, and implement a replacement schedule: Replace everyday glasses one year. Replace prescription sunglasses the next year.	Up	Down	Need More Information
You raise the Usual and Customary fees for spectacle lenses and all option upgrades.	Up	Down	Need More Information
Your business implements really pushy sales strategies, and most patients believe you are upselling to increase profits, not to improve their vision.	Up	Down	Need More Information

What is the best Capture Rate for your business?

How often should you Measure your Capture Rate?

Share Your Ideas to Increase Complete Exams per 100 Active Patients

Share Your Ideas to Increase AR %

What Motivates, Challenges, and Infuriates Your Patients

How do YOU Measure Up
and
How can YOU Improve

Presenter: Renee Jacobs O.D., M.A.

Capture Rate

Capture Rate Quiz

Capture Rate

Occurrence	What Happens to Spectacle Lens Capture Rate?		
	Up	Down	Need More Information
You convince a patient to schedule her 3 grade-school aged children for routine eye examinations, even though all have perfect 20/20 vision.			

Capture Rate

Occurrence	What Happens to Spectacle Lens Capture Rate?		
	Up	Down	Need More Information
You convince a patient with perfect vision, to return annually, due to a family history of glaucoma.			

Capture Rate

Occurrence	What Happens to Spectacle Lens Capture Rate?		
	Up	Down	Need More Information
You persuade more patients to return for annual well examinations, though most purchase new glasses every two to three years.			

Capture Rate

Occurrence	What Happens to Spectacle Lens Capture Rate?		
	Up	Down	Need More Information
You persuade a patient to buy prescription sunglasses for the first time, and implement a replacement schedule: <ul style="list-style-type: none"> • Replace everyday glasses one year. • Replace prescription sunglasses the next year. 			

Capture Rate			
Occurrence	What Happens to Spectacle Lens Capture Rate?		
	Up	Down	Need More Information
You raise the Usual and Customary fees for spectacle lenses and all option upgrades.			

Capture Rate			
Occurrence	What Happens to Spectacle Lens Capture Rate?		
	Up	Down	Need More Information
Your business implements really pushy sales strategies, and most patients believe you are upselling to increase profits, not to improve their vision.			

- Capture Rate**
- ▶ What is the best Capture Rate for your business?
 - ▶ How often should you MEASURE your capture rate?

- Patient Satisfaction**
- Influential Factors**
- End to End Clinical Journey
 - Price
 - Services
 - Referrals
 - Brand
 - When to Seek Care
 - Where to Purchase Eyewear
 - When to Purchase Eyewear

- Patient Satisfaction**
- ▶ Management Area Measures
 - Scheduling/Recall
 - Reception
 - Exam
 - Optical
 - Dispensing
 - Others
 - ▶ Overall Business Measures

- Patient Satisfaction**
- ▶ Infuriating Situation(s)
 - ▶ Proposed Solution(s)
 - ▶ Measure(s) to Prove Effective Change

Multiple Pair Sales

- ▶ Management Area Measures
 - Scheduling/Recall
 - Reception
 - Exam
 - Optical
 - Dispensing
 - Others

- ▶ Optical Sales Indicators/Measures

What Motivates, Challenges, and Infuriates Your Patients

Discussion

Additional Tools and Tactics

Call to Action

Presenter: Renee Jacobs O.D., M.A.

CURRICULUM VITAE

Renee Kathleen Jacobs O.D., M.A.

+1 720 635-9998

dr.reneejacobs@yahoo.com

EDUCATION

University of Colorado at Denver MA Curriculum and Instruction	2004
University of California, Berkeley Doctor of Optometry BS Physiological Optics	1989
University of California, Davis BS Biochemistry	1986

PROFESSIONAL EXPERIENCE

COPE Approved Speaker with Multiple COPE Approved Courses	2012 - Present
ABO Certified Speaker with Multiple ABO Approved Courses	2012 - Present
Owner/Consultant Practice Management Depot, Trade Name of Learning Empowerment Center, Inc.	2012 - Present
<ul style="list-style-type: none">• PMD is an online resource for staff training, management tools, and optometry consulting. We help management teams systematically increase optical lens sales.• Independent educators and consultants utilize a combination of technologies including GoToMeeting screen sharing with video conferencing, and video instruction.	
Contract Trainer/Consultant Speaker Coach TEDxStanleyPark 2017	2016 - 2017
<ul style="list-style-type: none">• I provide Speaker Coaching Services for one of the largest TED conferences in the world.• I assist the Program Team in selecting speakers.• I provide expert, diligent, and vigorous coaching throughout script writing and stage practice until final delivery March 4, 2017 in the Queen Elizabeth Theater, Vancouver B.C.	
Contract Trainer for APASS Education Consulting Corp. Burnaby B.C.	2015 - Present
<ul style="list-style-type: none">• I create curriculum and provide small group training, workshops, and coaching in Public Speaking.	
Contributing Author Eye Care Professional Magazine	2012 - 2015
Editorial Advisory Board Member and Contributing Author Optometry Times	2011 - 2015
Owner/Director Learning Empowerment Center, Inc.	2005 - 2007
<ul style="list-style-type: none">• Administrator of company providing reading and writing assessment and instruction for students pre-K through 12th grade.• Colorado State Certified Supplemental Service Provider.	
Owner/Doctor A to Z Eye Care, P.C.	1995 - 2008
<ul style="list-style-type: none">• Opened A to Z Eye Care, P.C. December 15, 1995. Cold start business grew to become state of the art medical practice.• Adopted new technology including but not limited to:<ul style="list-style-type: none">○ Maximeyes full scope EMR: appointments, exam documentation, online ordering, bar coded frame inventory management, recall, medical billing, medical correspondence, and more.○ Wall mounted computer monitors in each exam room for medical documentation, patient education, and Acuity Pro computerized eye chart and testing suite.○ Zeiss small pupil fundus camera with Visupac networked for imaging in each exam lane.	

- Flat panel monitors in each exam room for patient education.
- GDX during pre-test, all patients over the age of 18.
- Housed a modern optical with over 1500 frames. Opticians took pride in recommending best quality optics from newest lens technologies available.
- Sponsored the South West Area Low Vision Support Group, providing a facilitator, newsletters, guest speakers, and organized events.

Children's Eye Physicians
Optometrist

1995 - 1997

- Worked part time in tandem with Robert A. King, M.D., a pediatric ophthalmologist.
- Eye conditions seen on site, included but were not limited to the following: juvenile rheumatoid arthritis, congenital tropias, Duane's syndrome, dacryocystitis, refractive and strabismic amblyopia, accommodative tropias, aphakia, retinopathy of prematurity, cataracts, ptosis, blow out fracture with muscle entrapment, hyphema, corneal rupture, crystalline lens dislocation, embedded corneal foreign body, and more.

Independent Contractor
Optometrist

1993 - 1997

- Provided optometric services for a number of different offices including Optical Matters, Vista Optical, Pearle Vision, Lens Crafters, Patrick Fowler O.D., Donald Metzger O.D., and AAA Optical.

United States Air Force Academy
Optometrist Rank: Captain

1989 - 1992

- Provided primary and acute care in a hospital setting. I started a referral based low vision clinic, base wide elementary school vision screenings, started a vision therapy practice, and fit medically indicated contact lenses.
- Teaching
 - Served as a sole adviser to three senior optometry student externs.
 - As an American Heart Association certified *CPR Instructor Trainer*, trained and certified new CPR instructors, thereby providing hospital staff with training required for medical credentialing.
 - Created a monthly education series for hospital and cadet-clinic optometric support staff.

ORGANIZATIONS AND AWARDS

Toastmasters District 96 Fall Conference 2016 Humorous Speech Champion	October 2016
Toastmasters District 96 Spring Conference 2016 Education Chair	May 2016
President Competitive Speakers Vancouver	2016 – 2017
Toastmasters District 96 Director of Area T 78	2015 - 2016
Committee Member Colorado Optometric Association Children's Vision Committee	2004 - 2008
International Reading Association	2003 - 2008
Committee Member Colorado Optometric Association Children's Vision Task Force	2003 - 2004
Chairperson of Colorado Optometric Association Public Relations Committee	1995
American Red Cross CPR & First Aid Volunteer Instructor	1981 - 2001
Air Force Commendation Medal for Meritorious Service	1989 - 1992
Colorado Optometric Association	
American Optometric Association	
Beta Sigma Kappa	

PROFESSIONAL ACTIVITY

Advanced Therapeutic Certification	1994
Colorado License (1542)	1992
Passed NERCOATS Licensing Exam	
New York, New Jersey, Massachusetts, New Hampshire	1990
Washington License	1990
California License	1989
NEBO, All Sections	1989
IAB	1989