

# Client Project Services Agreement

Client: \_\_\_\_\_  
Business Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_



optical • marketing • group

Project Lead: Bill Gerber  
billg@omghome.net  
760-822-8819

## PROJECT OBJECTIVE:

To increase optical sales results while maintaining high patient & staff satisfaction.

## PROJECT SCOPE:

Over the course of 120 days:

- One 2 day visit
- One comprehensive Optical Performance Report
- Eight 1 Hour Skype follow up meetings
- On call availability for leadership & staff up to 8 hours

## PROJECT SCHEDULE:

### 1) Day 1-Onsite

#### AM:

- a. Bill Gerber arrives for observation of location with "business as usual".
- b. Goes through normal exam process with all Dr's working.
- c. Interviews all staff members to determine mindset, understanding of their role & potential opportunities.

#### PM:

- a. At 3:00pm, Mr. Gerber facilitates "The New Rules of Optical Retailing Workshop".
- b. Will educate all staff about the realities facing private optometry in today's climate; competition, patient psychology, net income after insurance, merchandising & personal accountability.
- c. During this presentation Mr. Gerber will introduce a new system for improving patient lifestyle diagnoses, definitive multi pair rx's and methodology for highly effective handoffs that will result in increased multiple pair purchases.
- d. Dinner with leadership to discuss observations, areas of opportunity and goals.

### 2.) Day 2-Onsite

#### AM:

- a. Recap key learning from prior day.
- b. Work as team (all staff) on personalizing Lifestyle Questionnaire, Optical Treatment Plan & discussing individual responsibilities to ensure successful patient outcomes.
- c. Work on sales skills, mindsets & service mentality to improve patient satisfaction; role-play, video, critique, obtain written commitments from team for new behaviors & results.
- d. Work on optical department objectives; individual goals, team goals, outreach opportunities, merchandising standards/best practices-Inventory control, vendor agreements, promotional planning+ identifying and selling often to Eyewear Enthusiasts.

#### PM:

- a. Practice reopens - Mr. Gerber stays for 2-3 hours to observe new behaviors and coach to help implement newly learned skills.
- b. Recap meeting with Leadership including scheduling of follow up Skypes.
- c. Mr. Gerber departs
- d. Mr. Gerber conducts 8 scheduled follow up video conferences to ensure implementation.

### 3.) Follow Up Schedule

- #1. Video Call w/ staff: 3 days post-visit
- #2. Video Call w/ staff: 10 days later
- #3. Video Call w/ staff to deliver Optical Performance Review Report: 7 days later
- #4. Video Conference w/ Leadership to review report: 1 day later
- #5. Video Call w/ staff: 14 days later
- #6. Video Call w/ staff: 20 days later
- #7. Video Call w/ staff: 30 days later
- #8. Video Call w/ staff: 30 days later

**Fees for the above project:** \$6,950 + travel expenses (*note: all expense estimates will be communicated prior to incurring for approval*)

**Terms:** \$3,950 due upon acceptance of proposal with the balance due on delivery of the Optical Performance Review Report.

Accepted by: \_\_\_\_\_ Date: \_\_\_\_\_  
Name: \_\_\_\_\_ Title: \_\_\_\_\_