



BRANDING AND PROMOTIONAL STRATEGIES THAT WORK

Valuable insights from colleagues to help you effectively market your own optometry practice.

WITH RYAN CAZARES, OD; HARDEEP KATARIA, OD, FAAO; SCOTT MOSCOW, OD; AND JENNIFER WADEMAN, OD

Seeking advice from established colleagues can be incredibly valuable for building a successful brand and promoting your practice. *Modern Optometry (MOD)* asked a panel of optometrists who have been successful in the promotion of their practices to share some of their secrets.

BRANDING AND IDENTITY

MOD: How did you develop your practice's brand identity, including logo, color scheme, and overall aesthetic?



logos designs. You choose the one

Jennifer Wademan, OD:

I used a crowdsourcing logo design website, where designers create a variety of bespoke

that best suits your envisioned brand identity and overall aesthetic—whether it be complex or simple. In terms of color scheme and overall aesthetic, I already had an idea of the design I wanted to create from examples I had seen online (Figure). I wanted to recreate a spa-like environment when a patient walked into my office, so I focused on colors, shapes, and textures that evoked that type of environment and overall feel.



to Vistaprint, where a designer there created a few drafts of a logo based

Scott Moscow, OD:

My parents, my sister, and I discussed some ideas, and our head of operations took them

on our description. After a couple of tweaks, we settled on a logo, and we liked the color blue, so we chose that (Figure), which made other decisions, such as the color scheme of our website, a no-brainer.



Ryan Cazares, OD:

I practice in Cajun country, and the Fleur de Lis represents the French culture

here. I incorporated an eye into my logo, which resulted in a clever and unique graphic easily recognizable to our patients and the public (Figure). The colors reflect those of the local university, which I attended and of which many members of the community are big fans. I would say our brand

is well-established locally, much of which can be attributed to my logo.



Hardeep Kataria, OD, FAAO: I took a stepwise approach when conceptualizing my practice's branding. The first step

was to determine the mission statement, or goal of my practice. The second step was to consider who my ideal patients were (eg, medical, retail, those receiving aesthetic treatments, or a combination).

Once I determined my goals and ideal patients, the third step was to conduct market research to identify my competition, find out where they were located, and determine if they were they appealing to my ideal patients and if so, whether there were any gaps in their offerings to my ideal patients.

I wanted my branding to reflect the three steps above, and oftentimes there was overlap. For example, the mission of my practice is to deliver advanced dry eye treatment and medical eye care to a demographic who can consider out-of-pocket costs not covered by their insurance plans. I also wanted my aesthetic to appeal to a population who was willing to pay a higher fee for a more personalized, concierge-type service. This meant investing in higher-end decor and

taking inspiration from aesthetic/spa businesses, while still maintaining a functional medical office. I designed my logo with the help of UAscend, and my practice in collaboration with Karina K Studio.

MOD: What factors did you consider when creating your brand to ensure it resonated with your target patient base?

Dr. Kataria: When creating my stepwise approach of assessing my mission statement, ideal patient, and conducting market research, I considered demographics, age, median income, gender, and socioeconomic status of my ideal patient.

Dr. Wademan: I used colors, textures, shapes, etc that matched my office aesthetic and design to create a uniform feel between my logo, my website, and the overall office design.

Dr. Moscow: We manufacture a few unisex in-house eyeglass frame lines, one of which, Lenox, is tied to a nonprofit that we're very passionate about called Angels Among Us (see *Additional Information*). For each Lenox frame sold, we make a donation to Angels Among Us, which helps animals in high-kill shelters. (Lenox is named after my parent's

dog, who is also the inspiration for the logo.)

PROMOTIONAL STRATEGIES

MOD: What promotional strategies have been the most successful for your practice in attracting new patients?

Dr. Cazares: Insurance always brings in the most patients, but the other two strategies that have been effective are search engine optimization (SEO) and Facebook advertising. We are one of the only specialty contact lens clinics in the area, so my SEO is geared towards that. It has paid off very well, as many specialty lens patients search for key terms such as "keratoconus" and "scleral contacts." Referring doctors also use Google to find me if I don't already have an established referral relationship with them.

Dr. Moscow: We try to accept a good amount of vision insurance plans, as long as it makes financial sense for us. This is because patients first look to see what doctors are on their insurance plans and then they go looking for your online reviews. That's why, if we go above and beyond with a patient, we're not shy about asking for an online Google or Yelp review.

Dr. Kataria: Google Ads was the best marketing tool for me when I first opened my practice. It required constant modification and monitoring to ensure that I was maximizing my search words and eliminating searches that did not result in conversions (ie, phone calls, visits to my website, etc). The second most effective marketing tool has been signage in the shopping center where I am located to attract walk-by traffic. Other effective strategies include word-of-mouth referrals, social media blog posts, Facebook groups, building positive online reviews, insurance panels, and using my landlord's social media outlets. Surprisingly enough, adequate training for my staff to capture the family members of new



Figure. Logos of the practices belonging to Drs. Moscow (top left), Wademan (top right), Cazares (bottom left), and Kataria (bottom right).

patients has yielded many referrals, helping to grow my patient base.

I also use my personal social media accounts to create and post educational content, and this helps with advertising services to current patients.

Additionally, I created marketing materials for referring doctors. They list all the services I offer, and I distributed them to local optometrists and ophthalmologists so they can provide this educational material to their patients. These brochures also contain my office contact information, should the patient request a consultation. The most effective of these has been a tri-fold brochure about one particular service: dry eye disease.

Regardless of which promotional method I choose, my website is always up to date with the latest information and blog posts to maximize my SEO capabilities.

Dr. Wademan: A well-rounded online presence, which to me means a visually pleasing and user-friendly website first and foremost. I feel as though this is your first chance at an either great or poor impression of your office, so make it phenomenal! Review sites such as Google Business Profile and Yelp are other great leads for attracting patients. But if those pages are merely existing without any care or effort on your part, they can potentially hinder and not help you. These sites need to be updated with pictures and information to give potential new patients an idea of what your practice is like.

Also, social media accounts can assist you in reaching additional patients. Accounts that are uniform and consistent with your overall theme help solidify your brand and aesthetic.

MOD: Have you found specific advertising channels or platforms to be more effective in reaching your target audience?

Dr. Moscow: There's nothing stronger than word-of-mouth referrals. We don't do any print ads, but we do

send out postcards for patients' yearly exams as well as 2-year reminders.

Funny story—I was out with friends years ago, and we ended up at second-tier friend's place at some point, and what did I see on their refrigerator? A Roswell Eye Clinic appointment reminder postcard!

Dr. Wademan: Online 100%: start with a good website.

Dr. Kataria: Google > Facebook > Nextdoor. Yelp has not been effective for me, but results may vary based on geographic location and even within neighborhoods.

ADDITIONAL INFORMATION

ABB Verify

www.abboptical.com/abb-verify

A centralized source for gathering eligibility and connecting with patients to help them maximize benefits. On-demand functionality provides real-time access to in-network vision and medical payers.

Abby

www.helloabby.com

A platform that connects patients and providers with contact lenses from every major manufacturer. Abby offers free direct-to-patient shipping, no-hassle returns, and time-saving features such as order tracking.

Angels Among Us

www.angelsrescue.org

A nonprofit charity dedicated to saving dogs and cats from high-kill shelters in north Georgia. The mission of Angels Among Us is to rescue one until there are none.

The Effortless Experience: Conquering the New Battleground for Customer Loyalty

By Matthew Dixon, Nick Toman, and Rick DeLisi

www.amazon.com/Effortless-Experience-Conquering-Battleground-Customer/dp/1591845815

MARLO

<https://meetmarlo.com/home/index.html>

A contact lens ordering experience similar to that which patients have come to expect from online retailers, but offered by their eye doctor's practice.

“WE SEND INTERNAL REVIEWS FOR EVERY PATIENT WHO COMES THROUGH THE DOOR, AND I READ ANY REVIEW THAT DOESN'T GET RATED ALL “EXCELLENTS.” IF THERE'S AN UPSET PATIENT, WE CALL THEM.

— SCOTT MOSCOW, OD, FAAO

Dr. Cazares: Facebook works extremely well for us. Our target audience is young mothers because they're usually the ones bringing their children to the clinic—and their husbands! This demographic mostly uses Facebook as opposed to other social media channels (eg, Instagram and TikTok), which tend to have a younger audience.

MOD: How do you balance traditional marketing methods (eg, print ads, brochures) with digital marketing (eg, social media, online ads)?

Dr. Wademan: I really don't invest in any print ads or mailers anymore; I don't think they are effective or as relevant at reaching potential patients, at least in my area. In the sense of traditional marketing, I count on word-of-mouth. I rely heavily on digital methods such as my website, Yelp, Google business, and social media in general. I've paid for services from Yelp before, but I found it was not worth the investment. Occasionally, when I host events at my office, I will boost social media posts, specifically on Facebook, because a lot of my patients use that platform.

Dr. Moscow: We have marketing companies that post on Facebook for us, but we find that when we post our own content, it does a lot better, so we are considering bringing in a professional to

take photos of our office and post about us, our backgrounds, and our staff.

Also, ABB Verify (ABB Optical Group; see *Additional Information*) does a really good job of sending out emails telling patients when they have any unused contact lens insurance benefits. We also send emails and text messages to patients from the practice about their yearly examinations.

Dr. Cazares: I have completely eliminated any kind of print advertising because the ROI is minimal. Social media advertising is fairly cheap and works better. People are on their phones all the time. Newspapers and phone books are becoming obsolete.

Dr. Kataria: To attract new patients, I find online ads and social media to be most effective. Also, establishing practice and provider profiles on insurance portals has helped patients find me and helps mitigate their anxiety of whether we were an approved provider.

To educate existing patients on advanced dry eye treatment options, I find that patients still value written materials, and therefore, my tri-fold educational brochure has been most valuable. I also have constructed email templates for dry eye disease and myopia control, which are ready to send to patients and parents who

are interested in learning more in an electronic format. This allows me to also send them videos and links to journal articles, enabling me to guide their research.

PATIENT RETENTION

MOD: What strategies do you employ to retain patients and encourage repeat visits?

Dr. Wademan: Pre-appointing patients for their next comprehensive eye exam is key. And it's not just putting them on the schedule for the following year; the verbiage used to explain the value of scheduling them a year out is so important. We initially used a script for staff to follow at patient check-out and each doctor played a role in mentioning the patient's return visit a year later (or sooner, if that was the case) at hand-off. My staff says something along the lines of, “Mrs. Smith, it's important that we see you yearly for your comprehensive eye examination, so we are going to schedule this same appt time for next year—that way you have a spot reserved. We know a lot can change in a year with schedules, so we will make sure to call well in advanced to make sure this time and day still works.”

It's important to place certain staff in charge of calling pre-appointed patients to confirm, cancel, or reschedule with enough time in advance for the patient and for you, too. We have now done pre-appointing for so long that patients are trained to expect it and most of all, they appreciate it!

Dr. Cazares: We serve a population that is prone to no-shows, so pre-appointing does not work for us. Fortunately, we are typically booked out for more than a month, so we're plenty busy. We use Weave to text and email patients 1 to 2 months before they are due for an exam, and we use MARLO (Alcon) and Abby (ABB Optical; see *Additional Information*) to remind contact lens patients that their prescription is set to expire and that it is time for an exam.

Dr. Moscow: We do 1 and 2-year recalls in paper and digitally. We also try to pre-appoint patients for their yearly exams before they leave. Check out scripting is key to our pre-appointing.

Dr. Kataria: Patient retention is not easy. With so much competition as we have here in Los Angeles, it can be a challenge to retain a patient and gain patient loyalty. Pre-appointing annual exams can be helpful. Patient education on disease state awareness helps patients engage and participate in their eye care and helps drive compliance and, therefore, patient retention. As my practice is new and building a patient base from scratch, we can spend more time educating patients, gaining rapport and building the trust of our patients and their family members. Patients value quality time spent with me, the provider, which directly contrasts the reduced time they spend with their other health care providers.

MOD: How important is providing exceptional customer service in patient retention, and how do you ensure your team excels in this area?

Dr. Moscow: The real issue is how to ensure your team excels in this area. We send internal reviews for every patient who comes through the door, and I read any review that doesn't get rated all "excellents." If there's an upset patient, we call them. Also, you must respond to both good and bad public reviews.

And my two cents on a bad review is, if you have a Facebook or Google troll who's just trying to beat you up, have a backbone. If you didn't do something wrong, explain your side of the situation—while respecting HIPAA—rather than apologizing. Of course, if you do screw up, say you're sorry.

Dr. Kataria: I agree with Dr. Moscow that adequate front desk training is crucial to patient retention. This requires

constant reminding and staff development training, and the process starts anew with every new hire. I find that written protocols are necessary for maintaining consistency and providing a frame of reference for all employees. Frequent 3-month employee performance reviews always involve a discussion of customer service based on my observations, and we openly discuss ways to improve together. Staff members need to participate in the creation of ways to improve customer service to ensure their enthusiasm and compliance.

Dr. Cazares: I share the same philosophy as Drs. Moscow and Kataria, and we pride ourselves in customer service. If an employee does not live up to our five-star reputation, we let them go.

Dr. Wademan: Patients have a lot of choices for eye care in my area, so it's vital that I provide exceptional customer service if we want to retain them year after year. We have spent countless meetings as a team talking about "the Disney experience," "the Ritz Carlton experience," or other examples of exceptional customer service in order to set expectations and demonstrate what I want to achieve in my office. We rarely say "no" to patients; instead, we find solutions. However, this doesn't mean we say yes to everything; it just means we try to find more than one solution for the patient, and they see this as going the extra mile for them.

ONLINE PRESENCE

MOD: How did you establish and manage your online presence, including a website and social media profiles?

Dr. Cazares: I love social media. I signed up for Facebook as soon as it became available locally, back when it was only for college students. I've seen all the changes it has undergone over the years and have been able to keep up. I established a Facebook page a year in advance of opening my clinic. I wanted to build up some hype. Over the years,

I've posted mostly fun content—people are more likely to engage with fun posts. They completely ignore educational posts (eg, those about eye diseases, glasses, etc), although those are important to make once in a while to educate patients on your scope of practice.

The most valuable posts I make on Facebook are through my personal page. I always remind my friends that I am an eye doctor by posting about my job. I show them the things I am capable of, and when their friends ask for local eye doctor recommendations, they think of me immediately.

Dr. Wademan: I used a free resource, but I customized every part of it to reflect my practice, brand identity, and overall aesthetic. I spent a lot of time gathering ideas from other websites (both eye care and non-eye care-related), which included different types of layouts, features, links, and types of online services and shops offered with a click of a button. It took some time initially to set up my website in the way I envisioned; however, it allowed me to learn all the ins and outs, so now it's fairly straight forward for me to manage. My social media profiles took time to build and grow, but they offer glimpses into my practice in a way that's different than what my website provides.

Dr. Moscow: We went with a custom website and shot videos with our own doctors. There is something to be said about a patient seeing a video about dry eye and then coming into a practice and seeing the *same* doctor who was in the video talking about treatment options for their own dry eye.

Dr. Kataria: I already had a moderate, professional social media presence prior to opening my cold start practice. I created a separate business profile and used my current social media presence to funnel traction to my business page. Patients new to my business page could appreciate that I was an established provider in the community and it

helped me gain their trust and loyalty. I manage my social media accounts, focusing on original, educational content for patients and professionals. I do not engage much in promotional posts or “influencing,” but rather on educating and gaining new patients. I have now enlisted the assistance of student interns to facilitate a more consistent content creation and posting schedule.

MOD: Have you used online reviews and testimonials to build credibility, and if so, how do you handle negative feedback?

Dr. Cazares: We send an automated text to every patient 4 hours after their exam using Weave. And, as I noted before, we ask them to rate us on Google and Facebook. We have more than 600 reviews on Google and a five-star rating. (We have a 4.9-star rating on Facebook.)

In that once-in-a-blue moon when we get a bad review, I am simply honest about it. If it is a mistake we made as a clinic, I admit to it and describe how we will address the issue and avoid making the mistake in the future. If it is a problem with the patient, I have no issues pointing out what went wrong (in a professional way and respecting HIPAA, of course). People who read reviews appreciate how you reply to bad reviews.

Dr. Wademan: Yes, and I’ve learned that a conscientious, honest, and professional response to a negative review can provide valuable insight to a prospective patient. Conversely, responding with negativity, blame, or disrespect can damage your reputation. It’s all in how you handle the situation or, in this case, negative review. I’ve had new patients tell me they came to my office specifically because they appreciated how I responded to a negative review.

Dr. Moscow: We make sure we respond both publicly and privately if we can figure out who the person is. If we can’t identify the person, we ask that they contact the head of operations of our clinic to discuss the matter. We take full responsibility for any mistakes we make, apologize, and offer to do whatever it takes to make the situation right.

I just read a book about conquering the new battleground for customer loyalty (see *Additional Information*) that was really insightful. It’s not necessarily about how much effort the customer (or patient) has to put in, it’s about their *perception* of effort needed to solve a problem. So being mindful of that and then, if necessary, going above and beyond in some way for the patient as well.

Dr. Kataria: This has been a learning process for me, personally. Certain platforms work well to build credibility with positive reviews, and we always encourage patients to leave us a review if they wish to do so. We always respond to negative reviews in a professional manner and go above and beyond to make it right with the patient. As a small business owner, there is a significant mental health aspect of engaging with negative reviews. We don’t talk about this much as a profession, but we should. When responding to such reviews, I try to strike a balance between maintaining professionalism and not allowing myself or my staff to be bullied by unhappy people. We constantly remind each other as a team that we cannot please everyone. I would recommend delegating the management of negative reviews to an office manager or staff member.

BUDGET AND ROI

MOD: How do you determine your marketing budget, and how do you measure the ROI for your efforts?

Dr. Moscow: We call our marketing budget a charity budget and try to choose what type of donation we give to a charity based on it benefiting us from an advertising perspective. We also run that charity through our filter: Does this go hand in hand with our values? Does this go hand in hand with what we do?

Dr. Kataria: As a cold start practice, any amount of marketing is helpful when starting from zero patients. I chose an affordable amount to spend per month (\$150) on Google Ads for the first 6 months and carefully monitored Google search results and conversions. When I realized that this marketing tool easily converted five patients to our clinic and/or optical per week, I was motivated to continue.

Dr. Cazares: Internal marketing works so well that I rarely invest in external marketing. I only usually invest in SEO and the occasional Facebook post. So, to be honest, I do not have a concrete

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— RYAN CAZARES, OD

marketing budget. I pay for Weave, and I pay for SEO, I post engaging content on social media, and I go from there. If we have new technology or offer new services, I may put some money behind a Facebook post, but because we are an established practice and are typically booked up, it is not a huge concern of mine. Also, because I know how to create engaging posts on Facebook, I can usually avoid paying to boost them.

MOD: Are there any cost-effective marketing tactics that have worked well for your practice?

Dr. Wademan: I use a display TV in my lobby and play slideshow loop of images, information, and videos sharing what we offer in my practice—from emergency eye care, to myopia management (and explaining what that is), to dry eye services. I used Canva to create the slideshow and, from time to time, I'll add to it. I also have this loop playing in my pretest room. Patients watch it while they are waiting and inevitably ask questions about what they saw.

I also created pamphlets and brochures about certain services we offer in my practice that we hand out—this varies; sometimes, it is related to intense pulsed laser and dry eye services, other times it is related to back-to-school eye exams, daily disposable contact lens benefits, etc. It's great to have other sources of promotion such as displays, brochures, etc., because I don't have to time to talk about everything!

Dr. Cazares: Again, boosted social media posts are extremely cost-effective. I have also considered offering rewards to patients. There is a local soda and ice cream shop that I may partner with to give coupons to patients who check in at the clinic via social media.

Dr. Kataria: I have found that real face time with referring doctors works well. I always bring a food item with me to show gratitude for their valuable time. It's a cost-effective marketing strategy, but it can be time-consuming.

PATIENTS HAVE A LOT OF CHOICES FOR EYE CARE IN MY AREA, SO IT'S VITAL THAT I PROVIDE EXCEPTIONAL CUSTOMER SERVICE.

—JENNIFER WADEMAN, OD

LESSONS LEARNED

MOD: What are some challenges you faced in branding and promoting your practice, and how did you overcome them?

Dr. Kataria: Patients often see the word "optometry" and automatically assume that we only sell eyeglasses and contact lenses. This was a challenge initially when it came to marketing our specialized dry eye services. Now, we have branding posted all over our office to advertise our Advanced Dry Eye Center. This includes our in-office signage and the tri-fold educational brochures we display in the optical, which mixes retail with medical.

My staff is well-trained on the specialized services we offer, and we lean on industry for that education as well.

Dr. Moscow: We initially spent money without any ROI, and that's frustrating. So that's why we give to charity. That way, if the money only goes to charity, great. But if we also get some added patients out of it, even better.

MOD: Is there anything you would do differently if you were starting your practice again?

Dr. Kataria: During the build-out phase, always add more storage and electrical outlets!

Dr. Moscow: This may sound trivial, but having such a long email address

(scott@roswelleyeclinic.com) is annoying. If I could do it over, I would choose scott@rec.com.

Dr. Wademan: Hahaha! I agree with Dr. Moscow! I've come to realize that jwademan@bidwelloptometry.com is just too long of an email address! ■

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