

# THE OD CONNECTION

March 2020

PentaVision

## THE BIG HOW-TO FEATURE

8 INTELLIGENT QUESTIONS TO ASK BEFORE JOINING  
A BUYING GROUP OR OPTOMETRIC ALLIANCE

8

Ways to  
Improve  
Staff  
Training



THE PLAYERS:

A Tear-Out  
Guide to  
Optometric  
Alliances

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PENTAVISION MEDIA  
321 Norristown Road, Suite 150  
Ambler, PA 19002  
267-492-5200

PUBLISHER

**Mark Durrick**

Mark.Durrick@pentavisionmedia.com

EDITOR-IN-CHIEF +  
EDITORIAL DIRECTOR

**Erinn Morgan**

Erinn.Morgan@pentavisionmedia.com

MANAGING EDITOR

**Kerri Ann Raimo**

Kerri.Raimo@pentavisionmedia.com

ASSOCIATE EDITOR

**Caroline Eddy**

Caroline.Eddy@pentavisionmedia.com

PRODUCTION DIRECTOR

**Sandra Kaden**

Sandra.Kaden@pentavisionmedia.com

SENIOR ART DIRECTOR

**William Pfaff**

William.Pfaff@pentavisionmedia.com

ASSOCIATE PUBLISHER

**Dawn Schaefer**

Dawn.Schaefer@PentaVisionMedia.com

CUSTOMER SUCCESS MANAGER

**Robyn Croisette**

Robyn.Croisette@pentavisionmedia.com

ACCOUNT SERVICES REPRESENTATIVE

**Stephen Pronesti**

Stephen.Pronesti@pentavisionmedia.com

CONTRIBUTORS

Stephanie K. De Long

PentaVision

PRESIDENT & MANAGER

Thomas J. Wilson

EXECUTIVE  
VICE PRESIDENTS

Mark Durrick

Douglas Parry

Robert Verna

Roger Zimmer



[EyecareBusiness.com](http://EyecareBusiness.com)

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This tear-out guide is your go-to source for the O.D. alliance space, complete with background on each + key features and benefits.

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#### COVER STORY

Score 8 intelligent questions to ask before joining a buying group or optometric alliance.

editor's letter



# The BIG How-To Issue



**IN THIS ISSUE**

*In our second special issue of The OD Connection, we focus on the How To, from eight questions to ask before you join to how to improve staff training.*

Welcome to the second issue of our new Penta-Vision publication—**The OD Connection**—which delivers key information, critical intel, and fresh ideas in the optometric alliance and buying group arena to help independent O.D.s make the right choices to be successful in today's uniquely competitive marketplace.

The focus of this issue is "How To." Do you know how to get about

finding the right buying group or optometric alliance for your business?

In our cover feature—**Know Before You Go**, starting on page 10—we check in with two expert optometrists—one HEA member and one Vision Source member—who divulge key strategies to serve up eight intelligent questions to ask before you join.

In our **Best Practices Primer** column on page 8, we turn to Mary Schmidt of EyeSystems to turn up the heat on staff training. ECPs point to staff training as a key benefit from their group or alliance, and Schmidt delivers on that with eight top tips and savvy strategies she shares in her education sessions with alliance members.

We also reveal fresh details on the optometric alliance and buying group landscape with our new, exclusive **2020 OD Connection Focus Group Study**. Starting on page 14, get key intel on what features, perks, and services eyecare professionals find most beneficial from their buying group or optometric alliance.

There's also much, much more actionable intel in this How-To issue of ODC, so keep

on turning the pages. Don't miss our engaging interview with PECAA's senior VP and general manager, Jamie Hughes (page 9), plus our guide to optometric alliances—The Players: Part II—starting on page 16, which is an excellent, must-keep resource.

**Want more? Check out our Facebook page: @TheODConnection**

We hope you enjoy the issue!

**ERINN MORGAN**  
Editor-in-Chief  
+ Editorial Director  
*The OD Connection*  
**Corporate Optometry Today!**  
*Eyecare Business*

AN IMPRESSIVE 96% OF SURVEY RESPONDENTS SAY THAT THE PERK OF SPECIAL PRODUCT PRICING IS ONE OF THE KEY BENEFITS THEY LOOK FOR FROM BUYING GROUPS AND ALLIANCES.

**96%**

**86%**

OF THOSE ECPS LOOKING FOR STAFF TRAINING, A STRONG MAJORITY OF 86% ARE LOOKING FOR OPTICIAN TRAINING OPTIONS.



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# PECAA

Professional Eye Care Associates of America

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# To The Point

Info-packed sound bites from across the industry



## EXPAND YOUR SCOPE

In conjunction with Dry Eye University, Professional Eye Care Associates of America (PECAA) has unveiled a new program for its members.

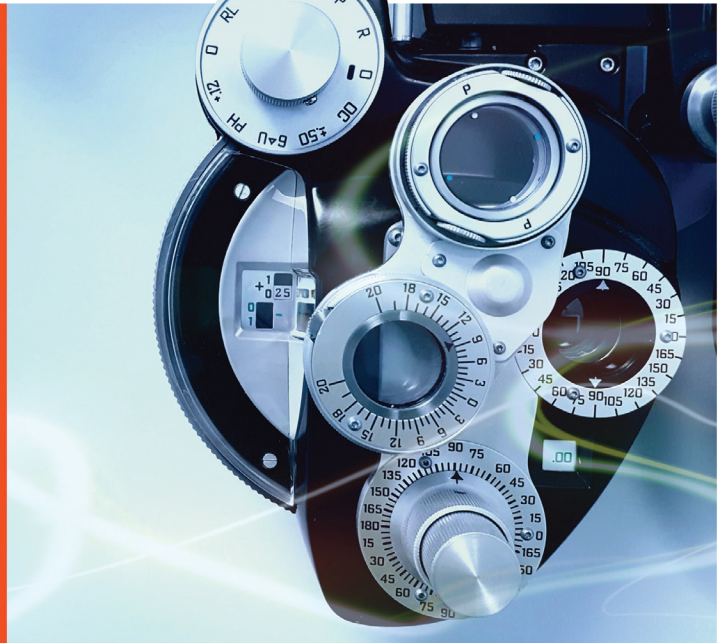
The comprehensive program, “90 Days to Dry Eye,” offers live events, online courses, interactive coaching, equipment recommendations, and more to help eye-care professionals implement successful dry eye services at their practice.

“Dry eye care represents a significant opportunity for

a practice to diversify their revenue stream with nonmanaged care revenue,” says Bryan Hoban, PECAA member business manager. “This program provides members the tools and resources needed to fully maximize their potential in this space.”

The member-exclusive program includes a one-year subscription to Dry Eye Access for the entire office and covers the Dry Eye University registration fee and all meals at the live event taking place in Irving, TX, on March 20-21.

**INFO:** [pecaa.com/dry-eye-education](http://pecaa.com/dry-eye-education)



## ALL ABOARD

Vision Source Next, launched in 2018, continues its goal of supporting private practice, as Vision Source recently announced that member practices have hosted approximately 20% of U.S. optometry students through its local field trips known as “Practice Crawls.”



*Students from Nova Southeastern University visit Family Vision Center P.A. in Wellington, FL*

“We typically see around 60 students attend a Practice Crawl, but some Crawls have been as large as 160 students filling three buses,” says Jeff Duncan, Vision Source general manager. “They get to visit different types of practices, meet successful doctors, and see what really happens in a thriving independent private practice setting.”

**INFO:** [insight.visionsource.com/VNext/home](http://insight.visionsource.com/VNext/home)

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# Best Practices Primer

Mary Schmidt of EyeSystems dishes on how to improve your staff training

Looking for bright ideas? Each issue of *The OD Connection* will offer up best practices—tips and strategies—in a critical corner of independent practice. This month's topic: staff training.

EyeSystems President Mary Schmidt, ABOC, CPO, knows a lot about training. With more than 30 years of experience in optical, she is a frequent speaker at alliance staff training workshops.

Here, Schmidt serves up eight top tips and savvy strategies she shares in those sessions with alliance members.

—Stephanie K. De Long



**MARY SCHMIDT,**  
ABOC, CPO  
president of  
EyeSystems,  
Pleasant Hill, CA

## ■ THE TREND

The biggest trend I currently see in training is “emphasis.” Staff training used to be survival mode in style. It was chaotic and what I call a “hummingbird approach,” flitting from

one situation to the next. Now I work with practices that have a plan, including annual learning goals with coaching and support.

## ■ THE PATIENT

The biggest driver I see requiring more training is the patient; they arrive with more information, higher expectations, and demand quality and service. From the professional standpoint, if your staff is not prepared, the practice will lose the sale or potentially the patient.

## ■ THE FORMAT

I stress training methods—hearing, seeing, then doing. We only retain a small percentage of what we hear, so “telling” people is not very effective. The old adage “It takes 21 attempts at a new skill to start to get comfortable, and 10,000 executions to become

an expert” is very true in our field.

## ■ THE MODULES

Audio, visual, and tactile—try to incorporate interesting examples and stories for them to hear, PowerPoint as a visual with lots of graphics and some movement, and, whenever possible, hands-on experiences, team breakout, and problem-solving.

## ■ THE BALANCE

A group can really help. Ideally, though, you also have an internal trainer who has been trained to train—not just someone who is good at their job. Then share the training duties among a team so there is a crossing of styles and information. And, be open to outside influences to keep everyone fresh and motivated.



**GOOD TO KNOW**  
One mistake? Not investing in the team’s training. And, that’s one place your group can really help.

## ■ THE STRUCTURE

The training process should be very structured and repetitive. Create a training checklist...mine is 27 pages long. Again, avoid the “hummingbird” technique, where you flitter from one topic to the next without depth.

## ■ THE DURATION

Most offices dramatically underestimate the time it takes to train. The general rule is 90 days for front desk staff to become competent (not expert, but competent).

Assistants should be developed for four to six months, depending on the technology in a practice and the amount of cross-training. An optician can take at a minimum 12 months; again basic competency nowhere near an expert—this could take years.

## ■ THE REASON

Training is never-ending. However, as an industry, we don’t train well. The more we can duplicate a structured training program versus a crisis-management style, the better we as an industry will serve patients.



# The Connection Q+A

ODC sits down with PECAA's senior VP and general manager, Jamie Hughes



**JAMIE HUGHES**  
PECAA's senior VP  
& general manager

**JAMIE HUGHES** is an expert on the ins and outs of optometric alliances, with eight years under his belt at PECAA, which was launched in 2006. Here he shares his thoughts about everything from the PECAA legacy and new initiatives to ECPS' challenges and opportunities moving forward.

**Q** HOW HAS PECAA EVOLVED SINCE 2006?

**A.** PECAA is proud of the legacy created by its founding doctors who would meet every few months to share best practices, discuss operational challenges, and ultimately work together to grow and improve their businesses. Even years later, PECAA remains true to those founding characteristics—we work hard every day to help members connect, learn from each other, and lead successful practices.

The biggest change is our scale. Today, we are a nationwide community of more than 3,800 doctors.

**Q** WHY IS BELONGING TO AN ALLIANCE BENEFICIAL?

**A.** Today, you see an industry that is heavily influenced by a small group of very large corporations. The potential of independent eyecare providers is found in their numbers, but their true

power is realized through coordinating and aligning their actions.

Eye doctors working together as part of a strong alliance like PECAA can wield massive influence within the industry we navigate, and that will lead to best outcomes for O.D.s. We believe that a thriving independent optometric profession drives better patient care and customer experiences.

**Q** WHAT IS PECAA'S PRIMARY FOCUS TODAY?

**A.** Connect. Build. Prosper. Our focus is to drive connection with like-minded ECPs, to deliver practice management education and consultation to build better businesses, and to bring prosperity to members by leveraging our size to create industry-leading cost savings and rebates.

**Q** WHAT ARE YOUR LATEST INITIATIVES + SERVICES?

**A.** We will build on several new services that were launched in 2019, including:

■ **Integrated Eye Care Initiative:**

Helping members understand how and when to transition from fee-for-service to outcome-based care to negotiate for higher reimbursements, drive referral relationships, and become a critical part of emerging patient care teams.

■ **PECAAHP,**

our Association Health Plan: Leveraging PECAA's group buying power to access a healthcare solution at competitive rates through a private, non-profit, level-funded benefits plan so members can attract and retain the best employees.

■ **90 Days to Dry Eye:**

A comprehensive learning experience that walks participants through the process of building a dry eye specialty practice in just 90 days.

We are also enhancing our free business-building Optical workshops, including our new Billing & Coding workshops. In total, PECAA will host 26 workshops around the country this year.

**Q** HOW CAN ECPS THRIVE GOING FORWARD?

**A.** Market conditions will continue to ask doctors to "do more for less," so it is important to become more efficient and effective at operating a practice. But there is more to just driving efficiency—there is an ocean of opportunity for independent eyecare providers to expand the ways they serve patients and not be beholden to the traditional business model of vision exams, eyeglasses, and contact lenses.

—Stephanie K. De Long



**GOOD TO KNOW**

"It's refreshing to see so many new practices entering the market—proof that the profession is thriving."

# KNOW BEFORE YOU GO

**8 intelligent questions to ask before joining  
a buying group or optometric alliance**

BY STEPHANIE K. DE LONG





The two ECPs invited to share their insights are:



**MICK KLING, O.D.**  
*owner of Invision Optometry in San Diego, who is a Vision Source member*



**KIM FRIEDMAN, O.D.**  
*a founder of Moorestown Eye Associates in Moorestown, NJ, and member of Healthy Eyes Advantage (HEA)*

# W

ondering what to consider before joining an alliance or buying group?

Or, are you considering switching to a new one?

To make your decision easier, we reached out to two veteran optometrists to get their take on key considerations when making these critical decisions.

They are:

- ➔ **Mick Kling, O.D.**, owner of Invision Optometry in San Diego, who is a Vision Source member
- ➔ **Kim Friedman, O.D.**, a founder of Moorestown Eye Associates in Moorestown, NJ, and member of Healthy Eyes Advantage [HEA]

Here, they serve up eight smart points to ponder before making your decision.

## 1. NEGOTIATIONS.

“Ask yourself whether it’s important to have a partner manage vendor price negotiations or whether you want to negotiate pricing on your own.” —**M.K.**

““ I want a group that will advance in pace with the natural evolution of eye care, but protect the independent ECP by partnering with vendors that do not erode my patient base.” ”

—*Kim Friedman, O.D.*

## 2. BEYOND PRICE.

“Buying group selection was traditionally about price. That is less important now and should be but one component of several.” —**K.F.**

## 3. LEVEL OF SERVICE.

“On one end you have some traditional buying groups which aggregate buyers [practices] and negotiate volume...often with a nominal fee.

“On the other hand, some alliances offer a high level of service with multiple programs and strategies to not only improve cost-of-goods savings,

but ensure overall practice growth, leadership skills of the owner, [and offer] business finance education, marketing strategies, etcetera.

“These services require a larger investment. Therefore, optometrists must determine what level of service they desire for the value they are receiving.”

—M.K.

#### 4. OTHER BENEFITS.

“What is most important to you? For example, are there reduced- or no-cost CE opportunities? Does the group offer technology as well as glasses and contact lenses? Consolidated billing? Credit card processing? The fewer vendors I need to deal with, the more efficient I can be with my time.”

—K.F.

#### 5. SERVICE QUESTIONS.

“Ask yourself, ‘How important is it to get the most aggressive pricing on products, equipment, and services? Do I want additional consulting services or practice management expertise? Additional

educational offerings such as leadership training or business acumen training? How important is it to have an alliance partner manage vendor price negotiations or do I want to negotiate pricing on my own?’” —M.K.

#### 6. PARTNERSHIP.

“You can’t hire nice. I need my group to have representatives I enjoy working with and who help support my business. I want them to bring offers that will benefit my bottom line, and I need quick resolutions to those minor issues that come up.

“It’s hard to quantify those types of qualities except to say, ‘I want to surround myself with people and businesses that make me better.’” —K.F.

#### 7. EVOLUTION.

“Online refractions, glasses, telemedicine,

“Ask yourself, ‘How important is it to grow faster than the overall market? And, ‘How important is it to be part of a larger, unified organization...?’”

—Mick Kling, O.D.

private equity, and insurance changes could ultimately be threatening the independent practitioner role in the eyecare space. I want a group that will advance in pace with the natural evolution of eye care, but protect the independent ECP by partnering with vendors that do not erode my patient base.” —K.F.

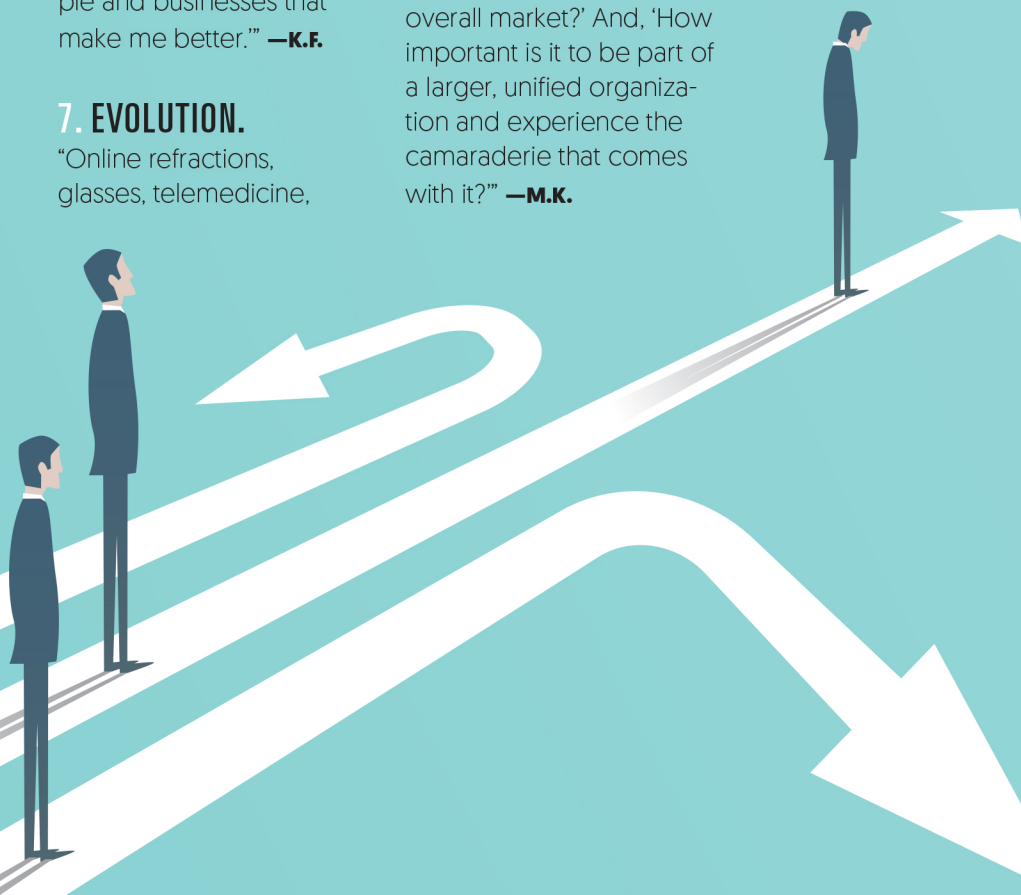
#### 8. GROWTH + GROUP.

“Ask yourself questions like these: ‘How important is it to grow faster than the overall market?’ And, ‘How important is it to be part of a larger, unified organization and experience the camaraderie that comes with it?’” —M.K.



#### THE BOTTOM LINE?

Whether you’re joining an alliance or buying group for the first time, or switching to a new one, take these steps. Analyze your own needs, perhaps in conjunction with other ECPs whom you respect. Then match them to the offerings of buying groups and alliances, and, only then, make your decision.



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# THE VALUE PROPOSITION

BY ERINN MORGAN

*The OD Connection's* exclusive 2020 Focus Group Study takes the pulse of ECPs across the country to learn which buying group + optometric alliance benefits are most valuable.

**D**o you belong to a buying group or optometric alliance—or both?

Both business-boosting platforms are stronger than ever with eyecare professionals today. In fact, a full 66% of study respondents say they have joined an alliance and 44% say they have joined a buying group in the past 15 years.

How are ECPs benefiting from their memberships in these groups—and how are they using these partnerships to bolster their bottom lines?

*The OD Connection's* 2020 Alliances + Buying Group Focus Group Study (a survey of ECPs across the country) reveals the key details and forward-looking trends in this unique arena for the new year.

## 5 KEY TAKEAWAYS

**#1 PRONOUNCED PROFITS.** Nearly half [47%] of focus group respondents have seen an increase in profits since joining an alliance or buying group. The average profit increase is 14%.

**#2 RADICAL ROI.** A full 56% of survey respondents revealed that, with all the benefits that alliances and buying groups offer, the return on investment has been well worth the decision to join.

**#3 THE TOP BENEFIT.** Special product pricing tops the list of benefits that ECPs are looking for from their buying group or alliance—a whopping 96% consider that perk to be somewhat to very important.

**#4 LEANING INTO TRAINING.** Staff training is another top buying group and alliance benefit for survey respondents, and 86% say they need optician training options the most, while 75% say they desire training in billing.

**#5 FUTURE ADOPTERS.** While 55% of survey respondents belong to a buying group and 36% belong to an optometric alliance, a very notable 67% of those ECPs who currently do not belong to a group or alliance say they do plan to join one within the next two years.



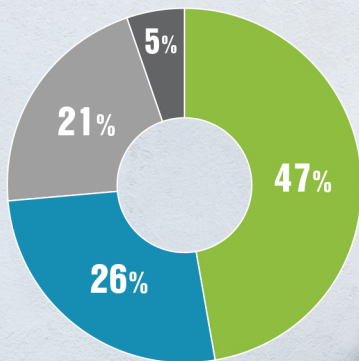
**The yearly meetings are very informative about business strategies.”**

—Survey Respondent

## THE PROFITABILITY

Nearly half of ECPs indicate that their profitability has increased since joining a buying group or optometric alliance—with an average of a 14% increase realized.

Since you've been a member of a buying group or optometric alliance, has your profitability increased or decreased?



● INCREASED    ● NOT SURE  
● STAYED THE SAME    ● DECREASED



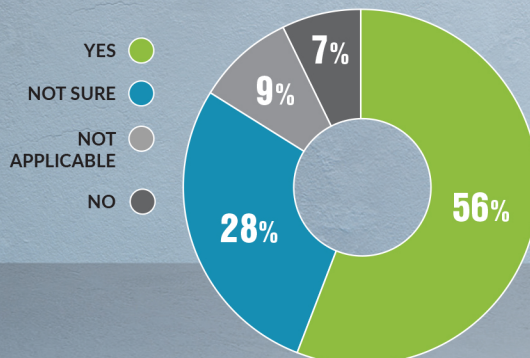
**I joined an optometric alliance for the support, education, and rebates.”**

—Survey Respondent

## THE ROI

Membership has a price, but the majority of ECPs say that it is well worth the cost of admission.

**Has the return on investment for an alliance or buying group membership been positive for your business?**



● YES  
● NOT SURE  
● NOT APPLICABLE  
● NO

## WHICH BENEFITS MATTER MOST?

Today's groups and alliances offer more benefits beyond product discounts than ever before. Which is the most valuable to ECPs?

BUYING GROUP + OPTOMETRIC ALLIANCE SUPPORT + BENEFITS RANKED BY SURVEY RESPONDENTS AS "VERY IMPORTANT":

Special product pricing

80%

Staff training

42%

Business education

39%

Professional network meetings

36%

Digital marketing resources

27%

Social media resources

20%

In-house marketing resources

20%

## COMPETITIVE BENEFITS

When asked about the biggest benefits realized since joining a buying group or alliance, ECPs had a variety of excellent thoughts:

### BUYING GROUPS

- DISCOUNTS
- DECREASE IN COST OF GOODS
- BILLING EASE
- LAB DISCOUNT
- PURCHASE NEW EQUIPMENT

### O.D. ALLIANCES

- DISCOUNTS + REBATES
- BILLING EASE
- LEARNING CODING/BILLING
- PRACTICE MANAGEMENT TRAINING
- GOAL SETTING + MARKETING

# THE PLAYERS

## *part 2*

THINKING OF JOINING AN OPTOMETRIC ALLIANCE? THIS TEAR-OUT GUIDE IS YOUR GO-TO SOURCE FOR THE O.D. ALLIANCE SPACE. DIG INTO THE FULL ROSTER HERE.

In the inaugural issue of *ODC*, we explored the various organizations available in the buying group space. To support your business even further, here we share the second installment—highlighting some of the key optometric alliances—designed to help you streamline the decision-making process for your practice.

### O.D. Alliances FYidoctors

Started in 2005, Canada's doctor-owned FYidoctors works to ensure that every FYidoctors clinic has advanced technology plus access to one of the top lens laboratories in the country—its very own ophthalmic lab in Delta, BC—where the organization manufactures its own Internal Freeform lenses.

■ [fyidoctors.com](http://fyidoctors.com)

### IDOC

For over 20 years, IDOC has worked to build a community of independent optometrists (now more than 3,000) and empower O.D. owners to live the practice of their dreams. The alliance provides practice management education and tools, expert advice, and unique offerings to drive business growth. All membership plans include complimentary metrics-based business solutions, negotiated vendor discounts and rebates, consulting based on deep knowledge sets, and fun and informative peer-to-peer networking.

■ [idoc.net](http://idoc.net)





# THE PLAYERS

part 2

## Independent Optometric Partners

Independent Optometric Partners (IOP) is a group of practicing optometrists who have joined together to promote private practice optometry through aggregated buying power, unique learning experiences for doctors and staff, mentorship, and camaraderie. IOP is doctor-owned and not affiliated with private equity or commercial interests.

■ [iopnetwork.net](http://iopnetwork.net)

## Opti-Port

Opti-Port is a national alliance of regional, multioffice eyecare providers that leverages the combined strength of its member companies to provide revenue-enhancing, cost-saving, and market-expanding opportunities by offering a solutions platform focused on group purchasing, technology, education and training, and marketing.

■ [optiport.com](http://optiport.com)

## Professional Eye Care Associates of America

More than 3,800 independent eyecare practitioners (from both established and new practices) have joined Professional Eye Care Associates of America (PECAA) for customized tools, business advice, marketing support, education and staff training, billing assistance, human resource guidance, vendor relationships, and peer camaraderie.

■ [pecaa.com](http://pecaa.com)

## Primary Eyecare Network

Founded in 1984, Primary Eyecare Network (PEN),



### GOOD TO KNOW

Of those ECPs looking for staff training from their buying group or alliance, a strong majority are looking for optician training options. —The OD Connection 2020 Focus Group Study

# 86%

a division of ABB Optical Group, works to enhance the independent professional optometrist's ability to compete in a rapidly changing eyecare marketplace by providing purchasing arrangements, business management and marketing support, quality educational programs, medical billing services, and more.

■ [primaryeye.net](http://primaryeye.net)

## Vision Source

Vision Source is a network of more than 3,300 locally owned practices and 4,500 doctors collaborating to provide quality eye care and to ensure the long-term success of private practice optometry—designed to help

independent optometrists reach their full potential.

■ [visionsource.com](http://visionsource.com)

## Vision Trends

Launched in 2007 by Douglas Inns, O.D., and Michael Toups, O.D., Vision Trends now includes more than 300 members in 30 states. Members benefit from programs such as vendor partnerships, insurance solutions, practice-building digital innovations, practice management education, and more.

■ [vtrends.us](http://vtrends.us)

**Do you work with—or for—an optometric alliance not included on our list? Please email [kerri.raimo@pentavisionmedia.com](mailto:kerri.raimo@pentavisionmedia.com).**

—Compiled by  
Kerri Ann Raimo



EYES ON IDOC

**Juawana Hall, O.D.**

In this regular column, ODC checks in with veteran O.D.s to get their best time-learned tips for what they wish they knew when first starting out with a buying group or optometric alliance.

**Juawana Hall, O.D.**, has been in private practice in Winston-Salem, NC, since 2005. She is also a member director at IDOC, responsible for leading the Winston-Salem territory, supporting local IDOC members, and facilitating study group meetings.

What was her process for selecting an optometric alliance?

“I was looking to save money on cost of goods and to improve practice efficiency. After researching several groups, I found that IDOC gave me the largest return on investment in terms of discounts and rebates,” says Dr. Hall. “It seemed like a no-brainer.”

What other benefits attracted her to IDOC? “After you add in free admission to their conferences and study groups, plus the education and consulting, the value far exceeds the cost,” she says.

Your own priorities will guide the search for the best alliance for your business.

Here, Dr. Hall shares tips on finding the right fit.

—Stephanie K. De Long



**JUAWANA HALL, O.D.**

member director at IDOC



**GOOD TO KNOW**

Founded in 1999 by Mark Feder, O.D., IDOC is an optometric alliance with over 3,000 independent optometrist members.

*Tip #1*

**VISION.**

“The single most important thing to look for is a group that aligns with the vision of your practice. Most companies can save you some money, but few will truly propel you toward YOUR vision for success.”

*Tip #2*

**PRICING.**

“There are a lot of groups out there with various pricing strategies. Read the fine print and make sure you aren’t locking yourself into something that will be a drain on your practice in the future.”

*Tip #3*

**VALUE.**

“IDOC is always adding partners and innovating with new programs to bring value. A group should work hard to keep your business.”

*Tip #4*

**GROWTH.**

“In a growing practice, growth rebates are amazing in the short term, but that level of growth becomes unsustainable at some point, as you max out on your ability to see more patients.”

*The game changer?*

**“LOOK FOR EXPERTISE IN KEY AREAS.”**

At IDOC, for example, having industry experts in finance, practice management, optical, marketing, and human resources is a game changer.”

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