



# HOLIDAY READY CHECKLIST!

Whether you like it or not, 2022 is nearly over. This no-brainer guide will help you plan the busiest time of year. While you likely have a million things going on, first things first:



## PLAN ASAP!

- Schedule a brief staff meeting to review priorities and delegate tasks. Being on the same page and knowing what's coming can help everybody get through the hectic end-of-year bustle. Start ironing out plans—it will be here in the blink of an eye.**

## GENERAL OFFICE TO-DOs

- DECOR** Many offices decorate in some way for the end of the year - whether it be for a holiday, gift giving, or winter themed - or have some fun with opto-elf-on-the-shelf! Share photos of your decorations on social media to show how festive your office is!
- EDUCATION** If your certification expires on December 31st you'd better check to see if you have all of the CEs you need to meet requirements. A list of where to gain free and paid ABO/NCLE CEs is available at [Optician-Now.com](https://www.Optician-Now.com).

- HOURS** Do you take more days off throughout the holidays or do you extend your hours to capitalize on the busy season? Whatever you do, make sure your hours are visible and easy for customers to find on their own.

- SCHEDULING** Consider altering your schedule template to allow more annual exams and less medical appointments that are not time-sensitive. This can be a buffer so the last minute'ers are able to get in before the new year.

- STAFF GIFTS** Eye and optical themed gifts are a hot commodity this time of year! Be sure to order in plenty of time,

especially for the custom items. Check out ECP curated gifts: EyeLoveLife Designs ([invisionmag.com/102210](https://www.invisionmag.com/102210)), the Optician ([invisionmag.com/102211](https://www.invisionmag.com/102211)), and [OpticalGifts.com](https://www.OpticalGifts.com).

- CELEBRATE!** Now is the time to pick a date and reserve a location if you're having a holiday party. Holidays are a busy time for everyone; agreeing on a date can be tricky.

## MARKETING

- USE IT OR LOSE IT** Help your patients maximize their benefits by reminding them to get an eye exam this calendar year. Also remind them that if they've already gotten an exam they

may have unused hardware dollar allowances or FSA/HSA dollars to use. Put this message everywhere: website, in-office signage, social media... everywhere. Visibility = more sales!

- END OF YEAR SALE** If you like to get rid of stale inventory at the end of the year, now is the time! You can make a separate section of frames that have been marked down or use a frame company's buyback program ([invisionmag.com/102204](https://www.invisionmag.com/102204)) to replace for new.

- CONTACT LENSES** Take advantage of contact lens rebates before they expire; the next rebate may not be as good. Promote huge savings by purchasing an annual supply — math out deducting rebate, benefits, or flex for net cost to patient, if any — or get a free plano pair of sunnies with a yearly supply of contact lenses — talk to frame reps about lower cost sunglass options to make this feasible.

## MANAGEMENT

- MAJOR PURCHASES** In most cases purchasing new and used instruments can save you big on taxes by learning how Section 179 Depreciation ([invisionmag.com/102203](https://www.invisionmag.com/102203), p. 4) affects your bottom line. Do your research, or consult an expert, to decide if this makes sense for your office.

- BUDGET** Reviewing 2022 before 2023 is wise so you can have time to implement any changes that may affect how your practice operates. It may not seem like a big change for you, but it may be for the staff member who is used to managing this on a daily basis.

- OPEN ENROLLMENT** Many health insurance and retirement plans have specific times of the year that changes can be made. Review plan costs, better options, or requirements. Be sure staff is aware of changes and can get questions answered with ample time prior to coverage changing.



**CASH OUT REWARDS** Nearly all spectacle lens companies and optical labs have a fee schedule of rewards points per lens option you've been ordering all year. These accumulate in your bank until cashed out or they can expire at the end of the year. If you're unaware of how to cash them out, give yourself ample time to get the details on point accumulation, gain access to a rewards portal online, and to convert your points to a dollar amount via check or to purchase equipment or supplies with the points. This may mean having accounts with multiple companies — talk with your lab rep for guidance. Don't let those hard-earned rewards go to waste!





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**BILLING, CODING & REIMBURSEMENT CHANGES** 'Tis the season for changes to billing, coding, or reimbursements, that will take effect in the new year. This is often difficult to make sense of; consider a Billing & Coding Advisor ([invisionmag.com/102205](https://invisionmag.com/102205)) — and/or closer to the end of the year keep your eye out for newsletters and webinars with this sort of info.

## OPTICAL

**STOCK UP ON INVENTORY** Don't wait until it's too late and you have no selection to sell from! Assess inventory needs and place orders either with your rep or reorder on your own before Thanksgiving to allow sufficient time to receive the product and get it out on the floor. If you don't have it, you can't sell it!

## STAY SANE

Each issue INVISION features an ECP and how they keep their cool in the crazy world we live in. I've read some pretty interesting and surprising responses and they're sure to help you out, or distract you, during this hectic time of year. See the Sanity Files ([invisionmag.com/102206](https://invisionmag.com/102206)).

Networking with like-minded professionals is another great way to stay grounded and know that you're not alone. Some local and virtual options include: your local chamber of commerce, peer-to-peer dinners, The Optical Women's Association ([opticalwomen.com](https://opticalwomen.com)), or even just listening to your favorite Optometry Podcast ([invisionmag.com/102212](https://invisionmag.com/102212)).

## NOT IN RETAIL?

**LENSES AND LABS** Now is the time to win over your accounts for life. Although offices are short-staffed, insanely busy, and won't have time to meet



with you, check in and see if there is *anything* they need to help make their lives easier short or long term. Sometimes it's as simple as a new photochromic UV light, calibrating a pupilometer, or even throwing in bonus rewards points to redeem on something later.

If you work anywhere in the industry, think about those who are busting their buns in the field. The ones that are on their feet all day, who are practically

opto-psychologists, all while somehow managing grumpy people and the smell of high-index being edged. Is there any way you can support them, as another ECP in the industry?

**FRAME VENDORS** Are you offering any promotions to incentivize last minute orders? Consider offering free shipping, free frames, or giveaways, with a minimum purchase. Plaster the promo on your website and have reps email accounts so they can take advantage of the limited time deal!

**FRAME REPS** Offices need more inventory for their busy season! If you don't have an account on your calendar see if they are open to do a virtual visit or if you can replenish their best-sellers.

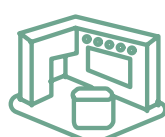
## PLAN FOR 2023

**SMART SPENDING** Assuming 2022 closes out with a bang, you'll have some cash flow! VisionWeb put together a fantastic short list of wise investments that will benefit your practice in a variety of ways ([invisionmag.com/102207](https://invisionmag.com/102207)).

**BUNDLE UP** Consider joining a practice alliance with buying group discounts. One example, PECAA, offers independent ECPs peer networking, advisors, staff education, huge savings with vendors, and other benefits.

**MARKETING** You should have a plan for each month, in advance, for at least the quarter, and loosely for the year. You can completely source this out and have a company like Marketing4ECPs do it all, or you can decide what you would like to take on yourself. Whether you need a whole website redo, want a revised brand, or just to have access to a library of pre-designed social media posts, this will check off a big box and you'll likely see a return on investment.

**STAFF DEVELOPMENT** Learning more about what you do and widening your knowledge base is always going to improve patient care. Why not be an office manager who is also a Certified Paraoptometric (CPO) or a tech who is NCLE certified? Read the full post, *Better Yourself With This Variety Of Resources To Advance Your Optical Career* ([invisionmag.com/102208](https://invisionmag.com/102208)).



**INDUSTRY EVENTS** Many dates are already set for 2023 industry trade shows, conferences, annual meetings, and others. Plan ahead by at least penning some dates on your schedule. See our list of upcoming events ([invisionmag.com/102209](https://invisionmag.com/102209)) and check back for new additions.



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