

The Optical Checklist

***How strategic checklists keep us
focused on success***

POINTS FOR DISCUSSION

Looking at your business
Essential themes for checklist making
Benefits
Prioritizing
Tools of the trade
Questions

5 Success Factors in Business



STRATEGIC FOCUS

Leadership, Management, Planning



PEOPLE

Personnel, Staff, Learning,
Development



MARKETING

Customer Relations, Sales,
Responsiveness



OPERATIONS

Processes, Work



FINANCE

Assets, Facilities, Equipment

MACRO

Looking at your business
through the larger lens

MICRO

Looking at your business
through a smaller lens

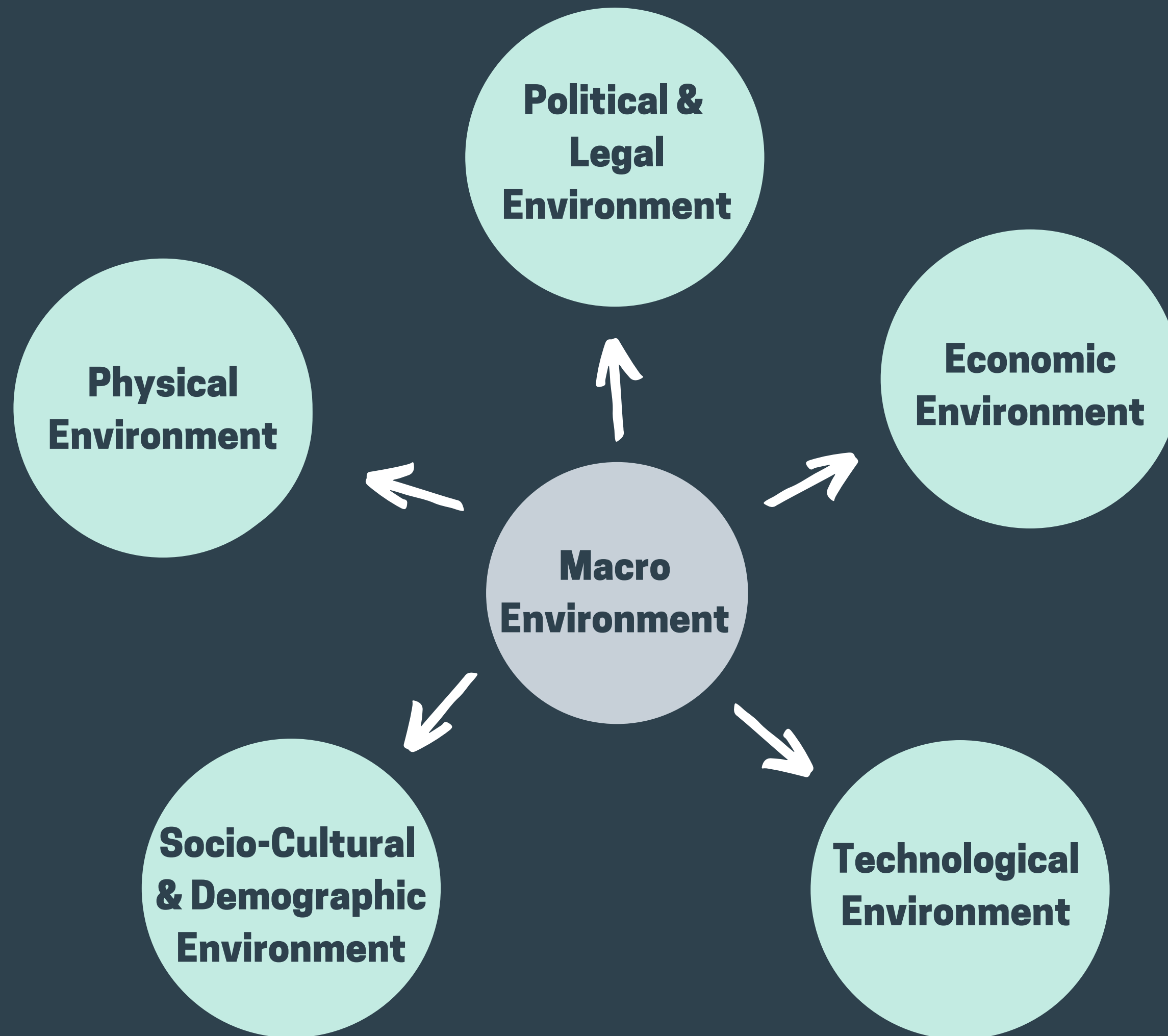
LOOKING AT YOUR BUSINESS THROUGH A MACRO LENS

Macro is the larger environment and general economy that influences the business. It constitutes the outside forces that are not under your control, but have powerful impact on the functionality of the business.



IN THE OPTICAL INDUSTRY WE WOULD CONSIDER MACRO FORCES TO BE GROUPS, ORGANIZATIONS, LICENSING AND EDUCATIONAL BOARDS, THE GOVERNMENT AND OTHERS WITH WHICH THE BUSINESS DEALS WITH BUT FOR WHICH THE PRACTICE HAS MINIMAL INFLUENCE.

The Macro environment is dynamic in nature and therefore keeps changing



LOOKING AT YOUR BUSINESS THROUGH A MICRO LENS

Micro is the business environment that is in direct contact with your practice and affects the routine and activity of the business right away. It is the staffing, stock, suppliers, patients and marketing that correlates with the practices or shops functions on a day to day. It is the collection of forces that are closely tied to the business. Through a micro lens we look at the factors that influence the performance of the business on a daily and weekly basis.







**MARKETING &
ADVERTISING**



**STAFF &
TRAINING**



SALES



CLEANING



INVENTORY



SOCIAL MEDIA



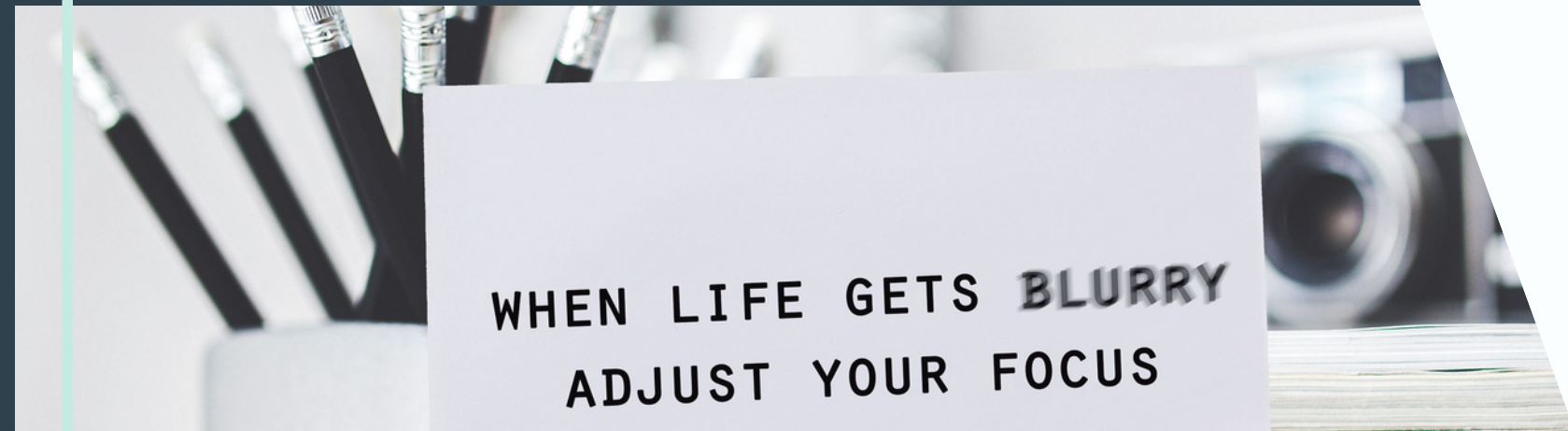
AUDITING



**COMMUNITY
INVOLVEMENT**

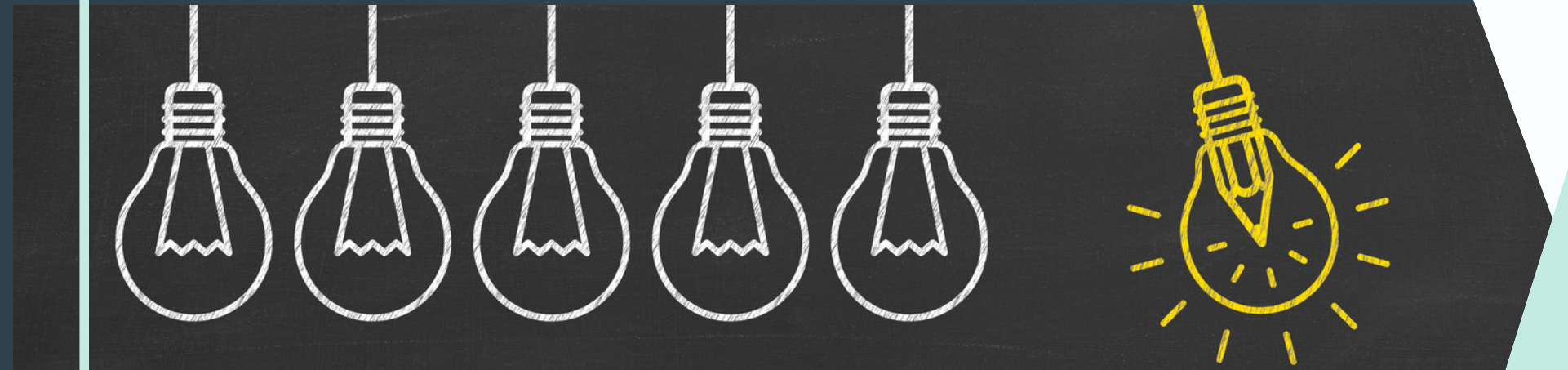
INSPIRATION

Sets a good example for your team and show them completion is key



IDEATION

Creating a checklist is a great brainstorming activity

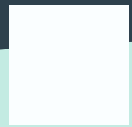


IMPLEMENTATION

Using a checklist on a daily basis creates organizational habits



Prioritizing & Organizing Your Checklist



STEP 1

Write down all you
need to get
accomplished



STEP 2

Highlight the most
time sensitive items



STEP 3

Complete those with
the most value



STEP 4

Check it off
(Feelings of satisfaction will
follow!)

Example

Writing a training plan might not seem so pressing, but if each employee is properly equipped to sell a new lens style, the result would be increased sales. Therefore the task has a higher assessed value.

URGENT VS. IMPORTANT

QUESTION

Ask yourself:

"If this doesn't get done today, will it affect someone else?"

PRETEND TO BE SOMEONE ELSE.

