

Practice Performance Assessment

Prepared by
ECP University

for

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for participation in the



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Section 1: **Background**

MBA Practice Profile Research

Since 2005, the Management & Business Academy (MBA), sponsored by Essilor, has gathered comprehensive information on the characteristics and financial performance of over 1,600 private optometric practices in the U.S. The MBA metrics database is believed to be the largest of its kind ever assembled. It includes practices across the entire spectrum of sizes and characteristics and both new and established practices.

This report has been prepared exclusively for your practice. It is strictly confidential and is not available to the program sponsors. Nor is any performance data for individual practices available to the sponsors.

Each year MBA publishes a comprehensive report: “Key Metrics: Assessing Optometric Practice Performance,” which presents more than sixty performance benchmarks relevant to private practice optometrists. The report includes guidance on how to interpret the performance benchmarks and how to use them to set realistic improvement goals. “Key Metrics” is a valuable introduction to your customized Practice Profile Report.

Using This Report

In this report, the first section shows your practice’s performance for a number of key productivity metrics and the percentile ranking of your practice among a large national sample of practices which have participated in the MBA Practice Profile research program.

For performance ratios that you did not directly report, but are calculated based on data you did supply (eg. gross revenue per complete exam), the data you supplied are shown, as well as the calculated performance ratio. For some productivity measures, estimates are provided of the financial impact on your practice revenue of achieving the 75th percentile of performance – a goal within reach of any practice making a dedicated effort to improve performance.

The metrics are divided into seven groups, including:

- Total Practice Productivity
- Eyewear
- Contact Lenses
- Medical Eye Care
- Marketing
- Financial
- Management “Best Practices”

At the end of each metrics grouping, a summary of your performance percentile rankings is shown, providing an at-a-glance assessment of your performance in each management area.

As you examine the report, you may note that certain performance metrics are “not reported,” indicating you did not supply the data necessary to calculate a performance ratio. For these metrics, the report can still be useful in assessing performance. You are able to calculate your performance by supplying the missing data, then comparing your performance to the deciles shown.

For metrics for which the median values are changing annually among optometric practices (fees, product usage ratios, etc.), the percentile rankings are based only on the prior year’s sample of respondents. For other performance ratios, the median values of which have been stable during recent years (eg. most revenue and exam production metrics), the percentile rankings are based on all previous MBA Practice Profile respondents.

Many productivity ratios are the product of a number of interacting variables. For example, gross revenue per complete exam is influenced by fees, retail pricing, product mix, capture rate, multiple device sales and managed care revenue ratio. On report pages discussing productivity metrics, there is a box titled “Performance variables impacting productivity.” This box lists the most important variables impacting that performance metric, ranked by the magnitude of their influence on performance in typical practices. These lists of variables provide guidance on what other practice metrics you should examine to identify the underlying causes of your performance, which will be useful in developing a targeted process improvement strategy. The report offers many comparative metrics to facilitate identification of causes of low performance.

As you examine your performance rankings in the first section, make a list of those metrics for which your performance is below the 40th percentile, focusing particularly on any for which you rank in the 25th percentile or lower. For these metrics you have a large opportunity for improvement. From the deficiency list, select two or three metrics on which to analyze your current performance in more detail in order to identify action steps for improvement.

For some metrics, a low productivity ratio does not necessarily indicate sub-optimal performance, but may reflect a conscious strategy to minimize effort in a particular area. For example, low ratios for medical eye care patient visits might reflect a deliberate de-emphasis on this service.

As you compare your expense ratios to optometric norms, remember that these ratios are affected by your revenue mix, your staffing philosophy, the age and size of your practice and any extraordinary spending event that may occur during a particular year. If you discover that your spending ratio in any category is well above the median, a useful next step is to conduct an in-depth analysis of all the expenses in that category to identify the specific sources of the high ratio.

At the end of the first section of the report, the management “Best Practices” currently in use in your practice are shown, and a composite score is presented,

enabling you to compare your level of adoption of “Best Practices” to a national cross section of your peers.

Section three compares your response to each question in the Practice Profile survey to the median response (or distribution of responses) of all other practices that completed the questionnaire in the past two years. Section two provides considerably more detail about the operational processes and characteristics of U.S. optometric practices including revenue sources, growth rates, instrumentation, staffing, expenses, OD compensation and many other quantitative measures. Compare the operational details of your practice to this national profile to further assess your strengths and weaknesses.

Section 2:

Practice Percentile Rankings

Total Practice Productivity Metrics

- **Gross Revenue per Complete Exam**
- **Complete Exams per OD Hour**
- **Annual Gross Revenue per Active Patient**
- **Annual Complete Exams per 100 Active Patients**
- **Gross Revenue per OD Hour**
- **Annual Gross Revenue per FTE OD**
- **Gross Revenue per Non-OD Staff Hour**
- **Gross Revenue per Square Foot of Office Space**

Gross Revenue per Complete Exam

Your 2016 gross collected revenue:

Your 2016 complete eye exams:

Your gross revenue per exam is:

Your productivity percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | HIGH PERFORMANCE | | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$159 | \$221 | \$251 | \$276 | \$297 | \$306 | \$317 | \$341 | \$371 | \$416 | \$500 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th productivity percentile:

Your complete eye exams (2016 actual):

Gross revenue per exam (75th percentile): **\$371**

Annual gross revenue (at 75th percentile productivity):

Gross revenue increase (versus 2016 actual):

Performance variables impacting productivity (ranked from greatest to least impact)

- Gross revenue per eyewear sale (eyewear product mix)
- Eyewear capture rate
- Managed care patient ratio
- Contact lens sales per contact lens exam (capture rate, boxes per wearer, usage ratios of specialty lenses, usage of daily disposable lenses)
- Professional fees
- Eyewear retail pricing
- Contact lens retail pricing
- Multiple device sales

Complete Exams per OD Hour

Your 2016 total OD hours:

Your 2016 complete eye exams:

Your complete exams per OD hour is: 0

Your productivity percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 0.50 | 0.71 | 0.84 | 0.96 | 1.06 | 1.10 | 1.15 | 1.28 | 1.44 | 1.65 | 2.18 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th productivity percentile:

Your OD hours (2016 actual):

Complete exams per OD hour (75th percentile): 1.44

Complete exams (at 75th percentile productivity):

Your gross revenue per exam (2016 actual):

Gross revenue (at 75th percentile productivity):

Gross revenue increase:

Performance variables impacting productivity (ranked from greatest to least impact)

- Size of active patient base
- Average elapsed months between patient eye exams
- Exam scheduling process
- Delegation of testing and administration to staff

Annual Gross Revenue per Active Patient

Your 2016 gross collected revenue:

Your 2016 active patients:

Your annual gross revenue per active patient is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | HIGH PERFORMANCE | | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$60 | \$83 | \$99 | \$112 | \$125 | \$133 | \$140 | \$157 | \$176 | \$204 | \$270 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th productivity percentile:

Your active patients (2016 actual):

Gross revenue per active patient (75th percentile): **\$176**

Annual gross revenue (at 75th percentile productivity):

Gross revenue increase (versus 2016 actual):

Performance variables impacting productivity (ranked from greatest to least impact)

- Gross revenue per eyewear sale (eyewear product mix)
- Eyewear capture rate
- Average elapsed months between patient eye exams and eyewear purchases
- Managed care patient ratio
- Contact lens sales per contact lens exam (capture rate, boxes per wearer, use of specialty lenses)
- Professional fees
- Eyewear retail pricing/gross profit margin
- Contact lens retail pricing/gross profit margin
- Multiple device sales
- Number of inactive patients incorrectly categorized as active patients

Annual Complete Exams per 100 Active Patients

Your 2016 complete eye exams:

Your 2016 active patients:

Your annual complete exams per 100 active patients is: 0

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 22 | 29 | 33 | 37 | 41 | 43 | 45 | 50 | 54 | 62 | 76 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th productivity percentile:

Your active patients (2016 actual):

Gross collected revenue (2016 actual):

Exams per 100 active patients (75th percentile): 54

Complete exams (at 75th percentile productivity):

Your gross revenue per exam (2016 actual):

Gross revenue (at 75th percentile productivity):

Gross revenue increase:

Performance variables impacting productivity (ranked from greatest to least impact)

- Effectiveness of recall methodology
- Use of pre-appointment recall methodology
- Interval between patient eye exams recommended by office
- Years of operation of practice
- Number of inactive patients incorrectly categorized as active patients

Gross Revenue per OD Hour

Your 2016 gross collected revenue:

Your 2016 total OD hours:

Your gross revenue per OD hour is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | HIGH PERFORMANCE | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$157 | \$219 | \$255 | \$286 | \$316 | \$330 | \$345 | \$383 | \$426 | \$486 | \$610 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th productivity percentile:

Your total OD hours (2016 actual):

Gross collected revenue (2016 actual):

Gross revenue per OD hour (75th percentile): **\$426**

Gross revenue (at 75th percentile productivity):

Gross revenue increase:

Performance variables impacting productivity (ranked from greatest to least impact)

- Complete exams per OD hour
- Gross collected revenue per exam

Annual Gross Revenue per FTE OD

Your 2016 gross collected revenue:

Your 2016 total OD hours:

FTE OD Annual Hours 2,080

Your 2016 FTE ODs: 0

Your annual gross revenue per FTE OD is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$336 | \$457 | \$535 | \$597 | \$656 | \$687 | \$717 | \$794 | \$881 | \$1,004 | \$1,243 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th productivity percentile:

Your FTE ODs (2016 actual):

0

Annual gross revenue per FTE OD hour (75th percentile): \$881

Gross revenue (at 75th percentile productivity):

Gross revenue increase:

Performance variables impacting productivity (ranked from greatest to least impact)

- Complete exams per OD hour
- Gross collected revenue per exam

Gross Revenue per Non-OD Staff Hour

Your 2016 gross collected revenue:

Your 2016 total staff hours:

Your gross revenue per non-OD staff hour is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--|
| \$52 | \$63 | \$69 | \$75 | \$81 | \$83 | \$86 | \$93 | \$102 | \$118 | \$147 | |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th | |
| PERCENTILE RANKING | | | | | | | | | | | |

Performance variables impacting productivity (ranked from greatest to least impact)

- Number of staff members
- Ratio of staff hours to OD hours
- Complete exams per OD hour (see page 6 for detailed variables)
- Gross collected revenue per exam (see page 5 for detailed variables)

Gross Revenue per Square Foot of Office Space

Your 2016 gross collected revenue:

Your total office square footage (all locations):

Your gross revenue per square foot is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--|
| \$167 | \$230 | \$265 | \$304 | \$345 | \$362 | \$383 | \$432 | \$501 | \$599 | \$811 | |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th | |
| PERCENTILE RANKING | | | | | | | | | | | |

Performance variables impacting productivity (ranked from greatest to least impact)

- Complete exams per OD hour
- Gross collected revenue per exam

Your Total Practice Productivity Metrics:
(Best to Worst Percentile Rankings)

**Your
Percentile
Ranking**

Gross Revenue per Complete Exam

Annual Gross Revenue per Active Patient

Annual Complete Exams per 100 Active Patients

Gross Revenue per Non-OD Staff Hour

Complete Exams per OD Hour

Annual Gross Revenue per FTE OD

Gross Revenue per OD Hour

Gross Revenue per Square Foot of Office Space

Practice Productivity Metrics Average Percentile Ranking **0th**

Eyewear Metrics

- **Eyewear Sales % of Gross Revenue**
- **Eyewear Rxes per 100 Complete Exams**
- **Eyewear Gross Revenue per Eyewear Rx**
- **Eyewear Gross Profit Margin %**
- **Progressive Lens % of Presbyopic Rxes**
- **No-Glare (anti-reflective) Lens % of Eyewear Rxes**
- **High Index Lens % of Eyewear Rxes**
- **Photochromic Lens % of Eyewear Rxes**
- **Eyewear Multiple Pair Sales % Eyewear Buyers**
- **% of Contact Lens Patients Purchasing Eyewear During Exam Visit**

Eyewear Sales % of Gross Revenue

Your 2016 collected gross revenue:

Your 2016 eyewear sales:

Your eyewear sales % of gross revenue is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | MEDIAN | | | | HIGH | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 21% | 33% | 37% | 40% | 42% | 43% | 45% | 48% | 50% | 54% | 62% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Performance variables impacting productivity (ranked from greatest to least impact)

- Eyewear gross revenue per eyewear Rx (see page 16 for detailed variables)
- Eyewear purchase rate among patients with no Rx change
- Level of medical eye care involvement
- Eyewear purchase rate among contact lens patients
- Level of contact lens specialization
- Multiple pair sales ratio

Eyewear Rxes per 100 Complete Exams

Your 2016 eyewear Rxes dispensed:
Your 2016 complete eye exams:

Your eyewear Rxes per 100 complete exams is: 0

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | MEDIAN | | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 30 | 44 | 49 | 54 | 59 | 61 | 64 | 68 | 76 | 88 | 109 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th performance percentile:

Your eyewear sales (2016 actual):

Your complete eye exams (2016 actual):

Eyewear Rxes per 100 complete exams(75th percentile): 76

Eyewear Rxes (at 75th percentile productivity):

Your eyewear gross revenue per eyewear Rx (2016 actual):

Eyewear gross revenue (at 75th percentile productivity):

Gross revenue increase (versus 2016 actual):

Performance variables impacting productivity (ranked from greatest to least impact)

- Frames merchandising proficiency
- Eyewear purchase rate among patients with no Rx change
- Eyewear purchase rate among contact lens patients
- Multiple pair sales ratio
- Eyewear and frames retail pricing

Eyewear Gross Revenue per Eyewear Rx

Your 2016 eyewear sales:

Your 2016 eyewear Rxes dispensed:

Your eyewear gross revenue per eyewear Rx is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--|
| \$106 | \$149 | \$176 | \$196 | \$213 | \$227 | \$239 | \$260 | \$288 | \$320 | \$385 | |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th | |
| PERCENTILE RANKING | | | | | | | | | | | |

Your revenue opportunity at 75th performance percentile:

Your eyewear Rxes dispensed (2016 actual):

Eyewear gross revenue per Rx (75th percentile): **\$288**

Annual gross revenue (at 75th percentile productivity):

Gross revenue increase (versus 2016 actual):

Performance variables impacting productivity (ranked from greatest to least impact)

- AR lens usage ratio
- Frames average sale
- Progressive lens usage ratio
- High index, photochromic, computer lens usage ratios
- Managed care patient ratio
- Eyewear retail pricing/gross margin

Eyewear Gross Profit Margin %

Your 2016 eyewear sales:

Your 2016 eyewear cost-of-goods:

Your 2016 eyewear gross profit:

Your eyewear gross profit margin % is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | MEDIAN | | | | HIGH | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 35% | 48% | 53% | 56% | 59% | 61% | 62% | 64% | 66% | 69% | 75% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your profit opportunity at 75th performance percentile:

Your eyewear sales (2016 actual):

Eyewear gross margin % (75th percentile): 66%

Eyewear gross profit (at 75th percentile productivity):

Gross profit increase (versus 2016 actual):

Performance variables impacting productivity (ranked from greatest to least impact)

- Eyewear retail pricing mark-ups
- Lens sales mix
- Frames sales mix

Progressive Lens % of Presbyopic Rxes

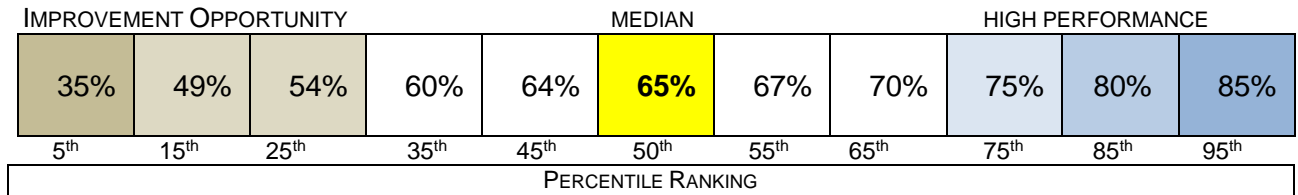
Your 2016 eyewear Rxes dispensed:

Your 2016 presbyopic lens Rxes:

Your 2016 progressive lens Rxes:

Your progressive lens % of presbyopic Rxes is:

Your percentile ranking is:



Your revenue opportunity at 75th performance percentile:

Your presbyopic lens Rxes dispensed (2016 actual):

Progressive lens % (75th percentile): 75%

Progressive lens Rxes (at 75th percentile productivity):

Progressive lens average sale increase: \$106

Gross revenue increase (versus 2016 actual):

No-Glare (AR) Lens % of Eyewear Rxes

Your 2016 eyewear Rxes dispensed:

Your 2016 no-glare lens Rxes:

Your No-Glare lens % of eyewear Rxes is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | MEDIAN | | | | HIGH PERFORMANCE | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 10% | 20% | 30% | 40% | 48% | 50% | 60% | 70% | 75% | 80% | 90% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th performance percentile:

Your eyewear Rxes dispensed (2016 actual):

No-Glare lens % (75th percentile): 75%

No-Glare Rxes (at 75th percentile productivity):

No-Glare lens average sale increase: \$80

Gross revenue increase (versus 2016 actual):

High Index Lens % of Eyewear Rxes

Your 2016 eyewear Rxes dispensed:
Your 2016 high-index lens Rxes:

Your high index lens % of eyewear Rxes is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | | MEDIAN | HIGH PERFORMANCE | | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 2% | 5% | 5% | 6% | 9% | 10% | 10% | 15% | 20% | 25% | 41% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th performance percentile:

Your eyewear Rxes dispensed (2016 actual):
High-index lens % (75th percentile): 20%
High-index Rxes (at 75th percentile productivity):
High-index lens average sale increase: \$45

Gross revenue increase (versus 2016 actual):

Photochromic Lens % of Eyewear Rxes

Your 2016 eyewear Rxes dispensed:

Your 2016 photochromic lens Rxes:

Your photochromic lens % of eyewear Rxes is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--|
| 6% | 11% | 15% | 15% | 20% | 20% | 20% | 24% | 27% | 33% | 40% | |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th | |
| PERCENTILE RANKING | | | | | | | | | | | |

Your revenue opportunity at 75th performance percentile:

Your eyewear Rxes dispensed (2016 actual):

Photochromic lens % (75th percentile): 27%

Photochromic Rxes (at 75th percentile productivity):

Photochromic lens average sale increase: \$108

Gross revenue increase (versus 2016 actual):

Eyewear Multiple Pair Sales % Eyewear Buyers

Your 2016 % of eyewear patients purchasing multiple pairs:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 1% | 4% | 5% | 5% | 8% | 10% | 10% | 10% | 15% | 20% | 33% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th performance percentile:

Your 2016 eyewear Rxes dispensed:

2016 patients purchasing one or more pairs:

2016 patients purchasing multiple pairs:

% of patients purchasing multiple pairs (75th percentile): 15%

Patients purchasing multiple pairs (at 75th percentile):

Eyewear gross revenue per eyewear Rx (2016 actual):

Gross revenue increase (versus 2016 actual):

Note: Assumes multiple pair purchasers buy an average of 2.2 pairs. Revenue estimate does not include any second pair discounts.

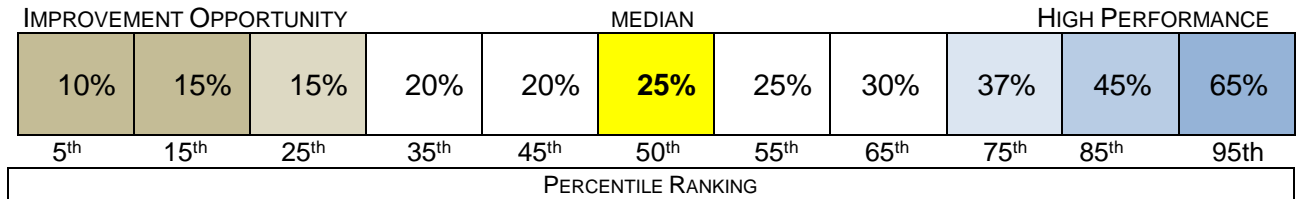
% of Contact Lens Patients Purchasing Eyewear During Exam Visit

Your 2016 contact lens exams:

0

Your 2016 % of contact lens patients purchasing eyewear:

Your percentile ranking is:



Your revenue opportunity at 75th performance percentile:

| | |
|--|-------|
| Your 2016 CL patient eyewear purchasers (actual): | 0 |
| Estimated average eyewear purchase (estimated actual): | \$150 |
| Your 2016 eyewear sales to CL wearers: | \$0 |
| % of CL patients purchasing eyewear (75 th percentile): | 37% |
| CL patients purchasing eyewear (75 th percentile): | |
| Eyewear sales to CL patients (75 th percentile): | |

Gross revenue increase (versus 2016 actual):

Your Eyewear Metrics Performance Summary: (Best to Worst Percentile Rankings)

**Your
Percentile
Ranking**

High Index Lens % of Eyewear Rxes

Photochromic Lens % of Eyewear Rxes

Eyewear Multiple Pair Sales % Eyewear Buyers

No-Glare (anti-reflective) Lens % of eyewear Rxes

Eyewear Gross Revenue per Eyewear Rx

Eyewear Rxes per 100 Complete Exams

Eyewear Sales % of Gross Revenue

Progressive Lens % of Presbyopic Rxes

Eyewear Gross Profit Margin %

% of Contact Lens Patients Purchasing Eyewear

Eyewear Metrics Average Percentile Ranking

0th

Contact Lens Metrics

- **Contact Lens Sales % of Gross Revenue**
- **Contact Lens Gross Profit Margin %**
- **Contact Lens Wearer % of Active Patients**
- **Contact Lens Exams % of Total Complete Eye Exams**
- **Annual Contact Lens Sales per Contact Lens Eye Exam**
- **Silicone Hydrogel Wearer % of Contact Lens Wearers**
- **Daily Disposable Wearer % of Contact Lens Wearers**
- **Soft Toric Lens Wearer % of Contact Lens Wearers**
- **Soft Multi-focal Lens Wearer % of Contact Lens Wearers**
- **Contact Lens New Fits per 100 Contact Lens Exams**
- **Contact Lens Refits % of Contact Lens Exams**

Contact Lens Sales % of Gross Revenue

Your 2016 collected gross revenue:

Your 2016 contact lens sales:

Your contact lens sales % of gross revenue is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | MEDIAN | | | | HIGH PERFORMANCE | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 6.4% | 9.1% | 11.0% | 12.4% | 13.9% | 14.6% | 15.2% | 16.9% | 18.8% | 22.5% | 29.6% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Performance variables impacting productivity (ranked from greatest to least impact)

- Contact lens sales per contact lens exam
- % of active patients wearing contact lenses
- Contact lens exams % of total complete exams
- Level of medical eye care involvement

Contact Lens Gross Profit Margin %

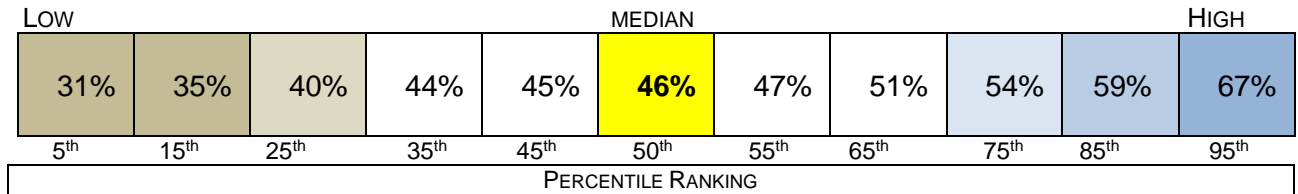
Your 2016 contact lens sales:

Your 2016 contact lens cost-of-goods:

Your 2016 contact lens gross profit:

Your eyewear gross profit margin % is:

Your percentile ranking is:



Your profit opportunity at 75th performance percentile:

Your contact lens sales (2016 actual):

Contact lens gross profit margin % (75th percentile): **54%**

Contact lens gross profit (at 75th percentile productivity):

Gross profit increase (versus 2016 actual):

Performance variables impacting productivity (ranked from greatest to least impact)

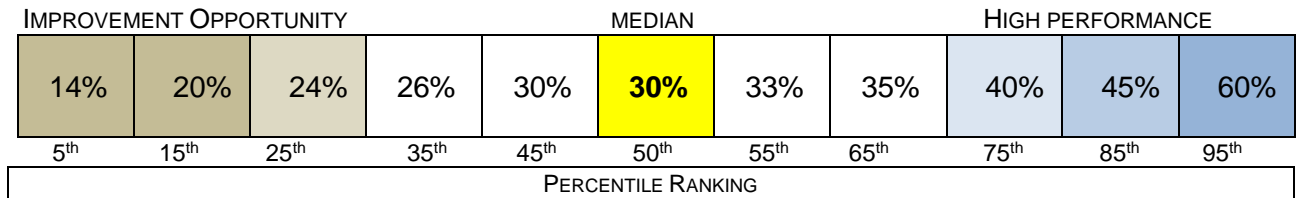
- Contact lens retail pricing mark-ups
- Contact lens sales mix
- Inventory management efficiency

Contact Lens Wearer % of Active Patients

Your number of active patients:

Your % of active patients wearing contacts:

Your percentile ranking is:



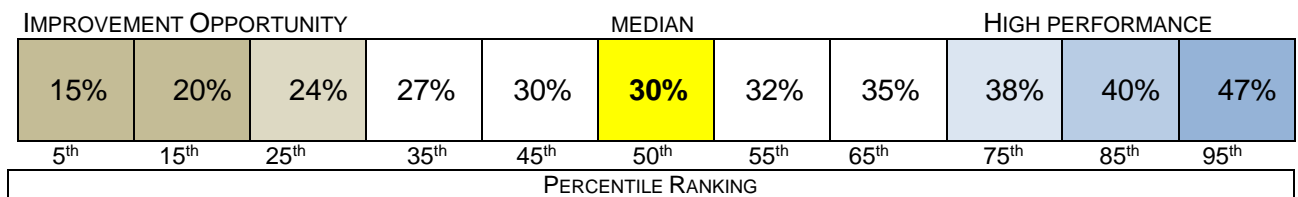
Contact Lens Exams % of Total Complete Eye Exams

Your 2016 total complete eye exams:

Your 2016 contact lens exams: 0

Your contact lens exam % of total exams: 0%

Your percentile ranking is: 2nd



Performance variables impacting productivity (ranked from greatest to least impact)

- Office process to present free soft lens trial to all glasses wearers under 50 years of age
- Patient demographics (% of patient base under 50 years of age)
- Level of medical eye care involvement
- Level of contact lens specialization

Annual Contact Lens Sales per Contact Lens Exam

Your 2016 contact lens sales:

Your 2016 contact lens exams: 0

Your 2016 contact lens sales per contact lens exam: \$0

Your percentile ranking is: 1st

| IMPROVEMENT OPPORTUNITY | | | MEDIAN | | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$51 | \$78 | \$108 | \$126 | \$142 | \$150 | \$155 | \$177 | \$203 | \$241 | \$309 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your revenue opportunity at 75th performance percentile:

Contact lens sales per contact lens exam (75th percentile): **\$203**

Your contact lens exams (2016 actual): 0

Contact lens sales (at 75th percentile productivity): **\$0**

Gross revenue increase (versus 2016 actual): **\$0**

Performance variables impacting productivity (ranked from greatest to least impact)

- Annual supply sales ratio
- Contact lens sales mix: usage of specialty lenses/daily disposables
- Contact lens retail pricing mark-ups
- Practice website with online reorder functionality

Contact Lens New Fits per 100 Contact Lens Exams

Your 2016 contact lens new fits:

Your 2016 contact lens exams: 0

Your contact lens new fits per 100 contact lens exams: 0

Your percentile ranking is: 1st

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 5 | 8 | 10 | 13 | 15 | 16 | 18 | 22 | 25 | 37 | 49 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Contact Lens Refits % of Contact Lens Exams

Your contact lens refits % of contact lens exams:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 10% | 15% | 20% | 25% | 30% | 30% | 33% | 40% | 50% | 60% | 70% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Performance variables impacting productivity (ranked from greatest to least impact)

- Early adoption of new contact lens technology
- Proactive presentation of new technology to “satisfied” wearers

Silicone Hydrogel Wearer % of Soft Lens Wearers

Your silicone hydrogel lens wearer % contact lens wearers is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 32% | 50% | 60% | 70% | 75% | 75% | 80% | 80% | 85% | 90% | 95% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Daily Disposable Wearer % of Soft Lens Wearers

Your daily disposable lens wearer % contact lens wearers is: 100%

Your percentile ranking is: 100th

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 2% | 5% | 5% | 10% | 10% | 14% | 15% | 15% | 20% | 28% | 43% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Monthly Lens % of Soft Lens Wearers

Your monthly lens wearer % soft lens wearers is:

Your percentile ranking is:

| LOW | | | | MEDIAN | | | | HIGH | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 10% | 25% | 35% | 40% | 45% | 50% | 50% | 60% | 70% | 80% | 88% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Soft Toric Lens Wearer % of Soft Lens Wearers

Your soft toric lens wearer % contact lens wearers is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 12% | 15% | 20% | 20% | 24% | 25% | 25% | 25% | 30% | 30% | 36% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Soft Multi-focal Lens Wearer % of Soft Lens Wearers

Your soft multi-focal lens wearer % contact lens wearers is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 2% | 5% | 8% | 10% | 10% | 10% | 10% | 15% | 18% | 20% | 28% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your Contact Lens Metrics Performance Summary

(Best to Worst Percentile Rankings)

| | Your Percentile Ranking |
|---|-------------------------------|
| Daily Disposable Wearer % of Soft Lens Wearers | 100th |
| Contact Lens Metrics Average Percentile | 9th |
| Contact Lens Exams % of Total Complete Eye Exams | 2nd |
| Annual Contact Lens Sales per Contact Lens Eye Exam | 1st |
| Contact Lens New Fits per 100 Contact Lens Exams | 1st |
| Monthly Lens Wearer % of Soft Lens Wearers | |
| Contact Lens Wearer % of Active Patients | |
| Soft Toric Lens Wearer % of Soft Lens Wearers | |
| Silicone Hydrogel Wearer % of Soft Lens Wearers | |
| Contact Lens Sales % of Gross Revenue | |
| Contact Lens Gross Profit Margin % | |
| Contact Lens Refits % of Contact Lens Exams | |
| Soft Multi-focal Lens Wearer % of Soft Lens Wearers | |

Medical Eye Care Metrics

- **Non-refractive Fee Revenue % of Total Gross Revenue**
- **Medical Eye Care Visits % of Total Patient Visits**
- **Annual Medical Eye Care Visits per 1,000 Active Patients**
- **Annual Pharmaceutical Rxes per 1,000 Active Patients**

Non-refractive Fee Revenue % of Total Gross Revenue

Your 2016 collected gross revenue:
Your 2016 non-refractive fee income:

Your non-refractive fee % of gross revenue is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | | MEDIAN | HIGH PERFORMANCE | | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 2% | 3% | 4% | 5% | 6% | 8% | 9% | 12% | 16% | 22% | 36% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Medical Eye Care Visits % of Total Patient Visits

Your 2016 medical eye care visits:
Your 2016 complete eye exams:
Your 2016 total patient visits:

Your medical eye care visits % of total patient visits is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | | MEDIAN | HIGH PERFORMANCE | | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 0% | 5% | 10% | 12% | 15% | 17% | 18% | 21% | 26% | 30% | 41% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Annual Medical Eye Care Visits per 1,000 Active Patients

Your 2016 medical eye care visits:
Your 2016 active patients:

Your annual medical eye care visits per 1,000 active patients is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | | MEDIAN | HIGH PERFORMANCE | | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 3 | 19 | 37 | 53 | 59 | 68 | 80 | 101 | 127 | 152 | 236 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Annual Pharmaceutical Rxes per 1,000 Active Patients

Your 2016 pharmaceutical Rxes:

Your 2016 active patients:

Your annual pharmaceutical Rxes per 1,000 active patients is:

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 0 | 18 | 31 | 40 | 52 | 56 | 62 | 83 | 107 | 161 | 300 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your Medical Eye Care Metrics Performance Summary: (Best to Worst Percentile Rankings)

Your
Percentile
Ranking

Annual Pharmaceutical Rxes per 1,000 Active Patients

Medical Eye Care Visits % of Total Patient Visits

Annual Medical Eye Care Visits per 1,000 Active Patients

Non-refractive Fee Revenue % of Total Gross Revenue

Medical Eye Care Metrics Average Percentile Ranking

0th

Marketing Metrics

- **Marketing Spending % of Gross Revenue**
- **Annual Marketing Spending per Complete Exam**
- **New Patient Exams % of Total Exams**
- **Website Expense**
- **% of Total New Patients Attracted by Practice Website**
- **Recall Staff Minutes per Complete Eye Exam**

Marketing Spending % of Gross Revenue

Your 2016 gross collected revenue:

Your 2016 marketing expense:

Your marketing spending % of gross revenue:

Your percentile ranking:

| LOW | | | MEDIAN | | | HIGH | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 0.1% | 0.4% | 0.6% | 0.9% | 1.1% | 1.2% | 1.3% | 1.8% | 2.3% | 2.7% | 4.0% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Annual Marketing Spending per Complete Exam

Your 2016 marketing expense:

Your 2016 complete eye exams:

Your marketing spending per complete exam: \$0

Your percentile ranking:

| LOW | | | MEDIAN | | | HIGH | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$0.25 | \$1.18 | \$2.05 | \$2.62 | \$3.54 | \$4.11 | \$4.76 | \$5.94 | \$7.82 | \$10.91 | \$21.92 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

New Patient Exams % of Total Exams

Your new patient exams % of total exams:

Your percentile ranking:

| LOW | | | MEDIAN | | | HIGH | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 10% | 15% | 20% | 20% | 23% | 25% | 25% | 30% | 35% | 40% | 60% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Website Expense

Your 2016 website expense:

Your percentile ranking:

| LOW | | | MEDIAN | | | | HIGH | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$0 | \$0 | \$100 | \$200 | \$300 | \$360 | \$500 | \$500 | \$900 | \$1,200 | \$3,400 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

% of Total New Patients Attracted by Practice Website

Your 2016 complete eye exams:

Your new patient exams % of total exams:

Your 2016 new patient exams:

Your 2016 new patients attracted by practice website:

Your % of total new patients attracted by practice website:

Your percentile ranking:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH PERFORMANCE | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 0% | 1% | 1% | 2% | 3% | 4% | 5% | 7% | 11% | 19% | 48% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Recall Staff Minutes per Complete Eye Exam

Your weekly staff hours spent on patient recall:

Your annual staff hours spent on patient recall:

Your annual staff minutes spent on patient recall:

Your 2016 complete eye exams:

Your recall staff minutes per complete eye exam: 0

Your percentile ranking:

| IMPROVEMENT OPPORTUNITY | | | | MEDIAN | | | | HIGH | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 0.4 | 1.0 | 1.6 | 2.1 | 2.6 | 3.1 | 3.6 | 4.9 | 6.7 | 9.4 | 22.0 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Your Marketing Metrics Performance Summary:
(Best to Worst Percentile Rankings)

**Your
Percentile
Ranking**

% of Total New Patients Attracted by Practice Website

Recall Staff Minutes per Complete Eye Exam

Marketing Spending % of Gross Revenue

New Patient Exams % of Total Exams

Annual Marketing Spending per Complete Exam

Website Expense

Marketing Average Percentile Ranking

0th

Financial Metrics

- **Non-contact Lens Exam Fee**
- **Contact Lens New Fit Exam Fee – Sphere**
- **Contact Lens New Fit Exam Fee – Soft Toric**
- **Contact Lens New Fit Exam Fee – Soft Multi-focal**
- **Contact Lens Exam Fee – No Refitting**
- **Average Collected Exam Revenue per Complete Exam**
- **% of Exams Provided with Managed Care Discount**
- **Accounts Receivables Days Outstanding**
- **Accounts Receivables % of Monthly Gross Revenue**
- **Cost-of Goods % of Gross Revenue**
- **Staffing % of Gross Revenue**
- **General Overhead % of Gross Revenue**
- **Occupancy % of Gross Revenue**
- **Net Income % of Gross Revenue**
- **Chair Cost per Complete Exam**

Professional Exam Fees

Non-contact Lens Exam Fee

Your non-contact lens exam fee:

Your fee percentile ranking is:

| LOW | | | MEDIAN | | | | | HIGH | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$65 | \$80 | \$89 | \$95 | \$108 | \$115 | \$120 | \$129 | \$139 | \$159 | \$195 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Contact Lens New Fit Exam Fee -- Sphere

Your contact lens new fit exam fee-- sphere:

Your fee percentile ranking is:

| LOW | | | MEDIAN | | | | | HIGH | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$99 | \$128 | \$148 | \$164 | \$179 | \$185 | \$190 | \$209 | \$235 | \$268 | \$314 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Contact Lens New Fit Exam Fee – Soft Toric

Your contact lens new fit exam fee—soft toric:

Your fee percentile ranking is:

| LOW | | | MEDIAN | | | | | HIGH | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$114 | \$139 | \$168 | \$179 | \$199 | \$205 | \$209 | \$234 | \$251 | \$284 | \$349 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Contact Lens New Fit Exam Fee – Soft Multi-focal

Your contact lens new fit exam fee—soft multi-focal:

Your fee percentile ranking is:

| | | | | | | | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| LOW | | | MEDIAN | | | | | HIGH | | |
| \$124 | \$155 | \$179 | \$197 | \$210 | \$216 | \$226 | \$250 | \$276 | \$314 | \$369 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Contact Lens Exam Fee – No Refitting

Your contact lens exam fee—no refitting:

Your fee percentile ranking is:

| | | | | | | | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| LOW | | | MEDIAN | | | | | HIGH | | |
| \$66 | \$94 | \$113 | \$129 | \$137 | \$141 | \$148 | \$157 | \$175 | \$197 | \$245 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Average Collected Fee Revenue per Complete Exam

Your 2016 eye exam gross collected revenue:

Your 2016 complete eye exams:

Your average collected revenue per complete exam:

Your percentile ranking is:

| | | | | | | | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| LOW | | | MEDIAN | | | | | HIGH | | |
| \$36 | \$50 | \$66 | \$73 | \$78 | \$79 | \$82 | \$95 | \$112 | \$132 | \$155 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Performance variables impacting productivity (ranked from greatest to least impact)

- % of exams provided with managed care discount
- Professional fees
- Mix of standard/contact lens exams

% of Exams Provided with Managed Care Discount

Your % of complete exams with managed care discount: 0%

Your percentile ranking is:

| | | | | | | | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| LOW | | | MEDIAN | | | | | HIGH | | |
| 9% | 25% | 35% | 50% | 62% | 65% | 70% | 80% | 82% | 90% | 95% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Accounts Receivables Metrics

Accounts Receivables Days Outstanding

Your 2016 gross collected revenue:

Your 2016 average monthly revenue:

Your average monthly accounts receivables:

Your accounts receivables % of monthly gross revenue:

Your accounts receivables average days outstanding: 0 days

Your percentile ranking is:

| IMPROVEMENT OPPORTUNITY | | | MEDIAN | | | HIGH PERFORMANCE | | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 50 | 32 | 30 | 24 | 18 | 17 | 15 | 11 | 8 | 5 | 2 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Practice Expense/Net Income Ratios

Cost-of Goods

Your 2016 gross collected revenue:

Your 2016 cost-of-goods: \$0

Your cost-of-goods % of gross revenue: 0%

Your percentile ranking is: 1st

| LOW | | | MEDIAN | | | | HIGH | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 16% | 22% | 25% | 26% | 28% | 29% | 29% | 30% | 32% | 35% | 38% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Staffing

Your 2016 gross collected revenue:

Your 2016 staff expense:

Your staff expense % of gross revenue:

Your percentile ranking is:

| LOW | | | MEDIAN | | | | HIGH | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 10% | 14% | 17% | 19% | 20% | 20% | 21% | 22% | 23% | 25% | 28% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

General Overhead

By Practice Size (median within practice size group)

| | | | | | | | | | | |
|------------------------------|-------|-------|-------|-------|-------|---------|---------|---------|---------|---------|
| 7.0% | 8.5% | 7.9% | 7.1% | 7.5% | 7.1% | 6.5% | 6.3% | 6.8% | 6.0% | 5.8% |
| MBA AVERAGE | \$356 | \$580 | \$698 | \$823 | \$947 | \$1,106 | \$1,300 | \$1,532 | \$1,852 | \$2,950 |
| ANNUAL GROSS REVENUE (\$000) | | | | | | | | | | |

Occupancy

Your 2016 gross collected revenue:

Your 2016 occupancy expense:

Your occupancy expense % of gross revenue:

Your percentile ranking is:

| | | | | | | | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| LOW | | | | MEDIAN | | | | HIGH | | |
| 2.8% | 3.9% | 5.0% | 6.2% | 6.7% | 7.0% | 7.1% | 8.5% | 9.2% | 10.8% | 14.2% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Net Income % of Gross Revenue

Your 2016 gross collected revenue:

Your 2016 total expenses:
(excluding OD compensation)

\$0

Your 2016 net income:

\$0

Your net income %:

0%

Your percentile ranking is:

2nd-3rd

| | | | | | | | | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| IMPROVEMENT OPPORTUNITY | | | | | MEDIAN | | | HIGH PERFORMANCE | | |
| 8% | 20% | 24% | 26% | 29% | 30% | 32% | 37% | 42% | 47% | 50% |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Chair Cost per Complete Exam

Your 2016 total expenses (excluding OD compensation): **\$0**
 Your 2016 cost-of-goods: **\$0**
 Your 2016 fixed costs:
 Your 2016 complete eye exams:

Your chair cost per complete exam:

Your percentile ranking is:

| LOW | | | MEDIAN | | | | | HIGH | | |
|-----------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| \$59 | \$86 | \$99 | \$107 | \$116 | \$121 | \$133 | \$144 | \$167 | \$181 | \$232 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |

Your Financial Metrics Performance Summary: (Best to Worst Percentile Rankings)

| | Your Percentile Ranking |
|---|-------------------------------|
| Net Income % of Gross Revenue | 2nd-3rd |
| Cost-of Goods % of Gross Revenue | 1st |
| Accounts Receivables Days Outstanding | |
| Chair Cost per Complete Exam | |
| Non-contact Lens Exam Fee | |
| Contact Lens New Fit Exam Fee –Soft Multi-focal | |
| Contact Lens New Fit Exam Fee –Soft Toric | |
| Average Collected Revenue per Complete Exam | |
| Occupancy % of Gross Revenue | |
| Contact Lens New Fit Exam Fee –Sphere | |
| Contact Lens Exam Fee –No Refitting | |
| Staffing % of Gross Revenue | |
| % of Exams Provided with Managed Care Discount | |
| Financial Average Percentile Ranking | 0th |

Best Practices

Financial Management

| | Total Practices | Your Practice |
|--|-----------------|---------------|
| Are accounts receivables reviewed monthly or more frequently? | 89% | No |
| Are cash, checks and credit card charges balanced daily against a production report? | 88% | No |
| Has a review of the practice's retail prices for contact lenses been conducted once or more during the past 12 months? | 84% | No |
| Do you regularly track major expense categories of the practice as a percentage of gross revenue (cost-of-goods, staff, occupancy, general overhead, etc)? | 82% | No |
| Do you review financial performance metrics quarterly or more frequently? | 78% | No |
| Has a review of the practice's retail prices for spectacle lenses been conducted once or more during the past 12 months? | 73% | No |
| Has a review of the practice's retail prices for frames been conducted once or more during the past 12 months? | 72% | No |
| Do you have quantified gross revenue and net income goals for the current year? | 69% | No |
| Do you communicate financial goals and key performance metrics to the staff quarterly or more frequently? | 60% | No |
| Do you perform a detailed return-on-investment analysis before purchasing new instruments? | 59% | No |
| When evaluating a new vision insurance plan, do you compare a current calculation of your chair cost to the likely revenue generated per plan patient? | 53% | No |
| Do you calculate revenue per exam monthly or more frequently? | 52% | No |
| Have you raised your exam fees during the past 12 months? | 45% | No |
| Do you calculate revenue per eyewear Rx monthly or more frequently? | 35% | No |
| Do you have a written practice budget by expense category for the current year? | 29% | No |

Marketing Management

| | | |
|--|-----|----|
| Does your practice routinely telephone patients who are due for an eye exam to book appointments or confirm pre-appointments? | 76% | No |
| Does your practice host one or more social media pages (Facebook, LinkedIn, Twitter, etc.)? | 68% | No |
| Apart from the practice website, does your practice invest more than \$2,000 annually to attract new patients to the practice? | 64% | No |

| | | |
|---|-----|----|
| Does your practice routinely capture the email addresses of patients and use email regularly to communicate with patients? | 63% | No |
| Are you involved in community organizations (service clubs, Chamber of Commerce, school boards, etc.)? | 57% | No |
| Is there a staff member in your practice with accountability for recall success? | 51% | No |
| Does the practice website enable patients to re-order soft lenses from you online? | 50% | |
| Do you currently engage an outside service to update and manage your practice website? | 49% | No |
| Does your practice routinely pre-appoint patients for their next exam at the conclusion of comprehensive eye exams? | 48% | No |
| Apart from the practice website, does your practice regularly communicate with existing patients during the months between eye exams? | 46% | No |
| Does the practice continuously conduct patient satisfaction surveys? | 44% | No |
| Does the practice publish a newsletter at least twice annually? | 30% | No |
| Is your practice website updated monthly or more frequently? | 29% | No |
| Did you develop a detailed marketing calendar and budget for the current year? | 23% | No |

Staff Management

| | | |
|---|-----|----|
| Does the practice have a written policy manual for employees? | 84% | No |
| Does the doctor or staff conduct daily inspections of the physical facilities to assure cleanliness and a good state of repair? | 79% | No |
| Does the practice have a written mission statement? | 66% | No |
| Does the practice have written job descriptions for each staff position outlining duties and responsibilities? | 64% | No |
| Is one hour or more spent in staff meetings each month discussing patient service improvements? | 61% | No |
| Are staff members required to wear uniforms to work? | 55% | No |
| Does the practice have a structured orientation program for new hires? | 46% | No |
| Does the practice conduct staff meetings at least weekly? | 42% | No |
| Was the practice mission statement discussed at a staff meeting once or more during the past quarter? | 30% | No |
| Does the practice have written protocols to resolve the most common patient complaints? | 30% | No |

Does the practice conduct a brief “huddle” with doctor and staff at the start of each workday? 19% No

Which of the following procedures, if any, are delegated to staff?

| | | |
|----------------------------------|-----|----|
| Lensometry (previous spectacles) | 93% | No |
| Visual field screening | 88% | No |
| Autorefraction | 84% | No |
| Trial contact lens insertion | 67% | No |
| Case histories | 67% | No |
| Visual acuities | 65% | No |
| Routine tonometry | 61% | No |
| Blood pressure measurement | 49% | No |
| Binocular vision assessment | 25% | No |
| Scribing | 20% | No |

Average number of tasks delegated 6.2

Total “Best Practices” Score (10 points per “best practice”)

Your Total “Best Practices” score: 0

Your total “Best Practices” percentile ranking is: 1st

| IMPROVEMENT OPPORTUNITY | | | | | MEDIAN | | HIGH PERFORMANCE | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 70 | 80 | 100 | 120 | 160 | 180 | 190 | 200 | 220 | 240 | 280 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Financial Management Score

Your financial management score: 0

Your financial management percentile ranking is: 1st

| IMPROVEMENT OPPORTUNITY | | | | | MEDIAN | | HIGH PERFORMANCE | | | |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 20 | 20 | 30 | 40 | 50 | 60 | 70 | 80 | 90 | 100 | 110 |
| 5 th | 15 th | 25 th | 35 th | 45 th | 50 th | 55 th | 65 th | 75 th | 85 th | 95 th |
| PERCENTILE RANKING | | | | | | | | | | |

Marketing Management Score

Your marketing management score:

0

Your marketing management percentile ranking is:

1st



Staff Management Score

Your staff management score:

0

Your staff management percentile ranking is:

1st



Your Best Practices Metrics Performance Summary:
(Best to Worst Percentile Rankings)

| | Your Percentile Ranking |
|-------------------------------------|--------------------------------|
| Financial Management Score | 1st |
| Total “Best Practices” Score | 1st |
| Marketing Management | 1st |
| Staff Management | 1st |
| Average Percentile Ranking | 1st |

Your Percentile Rankings: Best to Worst

| | |
|---------|----------|
| « A1 » | « AV1 » |
| « A2 » | « AV2 » |
| « A3 » | « AV3 » |
| « A4 » | « AV4 » |
| « A5 » | « AV5 » |
| « A6 » | « AV6 » |
| « A7 » | « AV7 » |
| « A8 » | « AV8 » |
| « A9 » | « AV9 » |
| « A10 » | « AV10 » |
| « A11 » | « AV11 » |
| « A12 » | « AV12 » |
| « A13 » | « AV13 » |
| « A14 » | « AV14 » |
| « A15 » | « AV15 » |
| « A16 » | « AV16 » |
| « A17 » | « AV17 » |
| « A18 » | « AV18 » |
| « A19 » | « AV19 » |
| « A20 » | « AV20 » |
| « A21 » | « AV21 » |
| « A22 » | « AV22 » |
| « A23 » | « AV23 » |
| « A24 » | « AV24 » |
| « A25 » | « AV25 » |

| | |
|--------|---------|
| « A26» | « AV26» |
| « A27» | « AV27» |
| « A28» | « AV28» |
| « A29» | « AV29» |
| « A30» | « AV30» |
| « A31» | « AV31» |
| « A32» | « AV32» |
| « A33» | « AV33» |
| « A34» | « AV34» |
| « A35» | « AV35» |
| « A36» | « AV36» |
| « A37» | « AV37» |
| « A38» | « AV38» |
| « A39» | « AV39» |
| « A40» | « AV40» |
| « A41» | « AV41» |
| « A42» | « AV42» |
| « A43» | « AV43» |
| « A44» | « AV44» |
| « A45» | « AV45» |
| « A46» | « AV46» |
| « A47» | « AV47» |
| « A48» | « AV48» |
| « A49» | « AV49» |
| « A50» | « AV50» |
| « A51» | « AV51» |

« A52»

« AV52»

« A53»

« AV53»

« A54»

« AV54»

« A55»

« AV55»

« A56»

« AV56»

« A57»

« AV57»

Section 3:

Questionnaire Responses

About Your Facilities

| | Total Practices (median) | Your Practice |
|--|--------------------------|---------------|
| How many office locations do you have? | 1 | |
| What is the total square footage of all locations of the practice? | 3,000 | |
| What is the total square footage of the optical dispensary(s) of all locations of the practice? | 680 | |

About Your Manpower

| | | |
|---|-------|--|
| How many full-time or part-time staff members (non-OD) are currently employed by your practice? | 6 | |
| Twelve months ago , how many full-time or part-time staff members (non-OD) were employed by your practice? | 6 | |
| What number of full-time or part-time non-OD staff members Stopped working for the practice , for any reason, during 2016? | 1 | |
| What is the total number of hours that all non-OD staff members worked in the practice during 2016? | 9,065 | |
| During the average work week, approximately how many hours does your staff spend engaged in activities related to patient recall? | 2 | |
| How many optometrists currently work in the practice, either full time or part-time? | 2.1 | |
| How many of the optometrists who work in the practice are employed associate ODs ? | 0 | |
| What is the total number of hours that all ODs worked in the practice during 2016? | 2,625 | |

About Your Patient Base

| | | |
|--|-------|--|
| Approximately how many total active patients do you have in the practice? | 7,500 | |
|--|-------|--|

| | Total Practices (average) | Your Practice |
|--|------------------------------|---------------|
| Of your total active patients, approximately what percentage falls into each of the following three groups? | | |
| Wears eyeglasses only | 55% | 100% |
| Wears contact lenses-even occasionally | 34% | |
| Wears neither eyeglasses or contacts | 11% | |

About Your Patient Visits

| | Total Practices (median) | Your Practice |
|--|-----------------------------|---------------|
| What was the total number of complete eye exams performed by the practice during 2016? | 2,649 | |
| Of the total number of complete eye exams performed during 2016, how many were.....? | | |
| Provided to patients who use spectacles as their primary corrective device | 1,449 | 0 |
| Contact lens exams | 707 | 0 |
| "Healthy eye" exams provided patients requiring no correction | 300 | 0 |
| Of the total number of complete eye exams performed during 2016, what percentage was performed for patients new to the practice? | 25% | |
| During 2016, approximately how many new patients were initially attracted to the practice by your website? | 25 | |
| Of the total number of complete eye exams performed during 2016, what percentage were provided at a discounted fee as part of a managed vision care insurance plan (exclude Medicare/Medicaid)? | 65% | 0% |
| During 2016, what was the total number of follow-up supervision visits by contact lens patients? | 400 | |

| | Total Practices (median) | Your Practice |
|--|--------------------------------|------------------|
| During 2016, what was the total number of office visits made by patients to manage each of the following medical conditions ? | | |
| Dry eye | 125 | |
| Ocular allergy | 90 | |
| Cataract co-management | 25 | |
| Glaucoma | 72 | |
| Ocular infection | 100 | |
| Refractive surgery co-management | 10 | |
| Foreign body removal | 20 | |
| Total medical eye care visits | 517 | |
| For each of the conditions listed below, approximately how many pharmaceutical prescriptions have all optometrists working in the practice written during the past 90 days? | | |
| Dry eye | 18 | |
| Ocular allergy | 30 | |
| Glaucoma | 12 | |
| Ocular infection/inflammation | 26 | |
| Total pharmaceutical Rxes | 115 | |
| During 2016, what was the total number of patients for whom retinal imaging was performed? | 500 | |

About Your Practice Revenue

| | |
|---|-----------|
| What was the total collected gross revenue of the practice during 2015 ? | \$863,000 |
| What was the total collected gross revenue of the practice during 2016 ? | \$865,000 |
| For the average month during 2016, what was the total accounts receivable of the practice? | \$40,000 |

| | Total Practices (median) | Your Practice |
|---|--------------------------------|------------------|
| Of the total gross revenue collected by the practice during 2016, what amount came from each of the following sources? | | |
| Complete refractive eye exams | \$230,000 | |
| Contact lens follow-up supervision visits | \$23,000 | |
| Medical eye care visits | \$46,000 | |
| Other professional fees | \$18,000 | |
| 2016 Total professional fees | \$369,000 | \$0 |
| Eyeglasses sales | \$385,000 | |
| Contact lens sales | \$111,000 | |
| Other product sales | \$1,300 | |
| 2016 Total product sales | \$488,000 | \$0 |
| Of the total gross revenue collected by the practice during 2016, what amount came from each of the following payers? | | |
| Medicare/Medicaid | \$86,500 | |
| Vision/health insurance companies | \$441,000 | |
| VSP | \$173,000 | |
| Direct payments/co-payments from patients | \$216,000 | \$0 |

About Your Eyewear Dispensing

| | |
|---|-------|
| How many complete spectacle Rxes with new frames did your practice dispense during 2016? | 1,292 |
| How many patients purchased spectacle Rxes during 2016 which were put into old frames ? | 283 |
| Approximately what percentage of your patients who purchase eyeglasses during an office visit buy more than a single pair of prescription eyewear? | 10% |

| | Total Practices (average) | Your Practice |
|--|---------------------------------|------------------|
| Of the spectacle lenses your practice dispenses, what percentage is of each of the following types? | | |
| Single vision lenses | 54% | 100% |
| Presbyopic lenses (Bifocal/trifocal/progressive) | 46% | |

| | Total Practices (average) | Your Practice |
|---|------------------------------|---------------|
| Approximately what percentage of your spectacle lens patients who require presbyopic correction purchase the following? | | |

| | | |
|-------------------------|-----|------|
| Half eyes/readers | 10% | 100% |
| Bifocal/trifocal lenses | 25% | |
| Progressive lenses | 63% | |
| Other | 2% | |

| | Total Practices (median) | Your Practice |
|---|-----------------------------|---------------|
| Approximately what percentage of your spectacle lens patients purchase the following? | | |

| | |
|--|-----|
| High index lenses (1.67 index of refraction or higher) | 10% |
| Anti-reflective lenses | 52% |
| Photochromic lenses | 20% |
| Prescription sunglasses | 10% |
| Computer lenses | 5% |

How many frames do you currently have **on display**? 700

How many additional frames do you have **in storage** that are not on display? 75

What is the approximate **average wholesale cost per frame** in your inventory? \$65

For **patients receiving contact lens exams** during 2016, approximately what percentage **purchased a pair of eyeglasses** during their exam visit? 25%

How many pairs of plano sunglasses do you currently inventory? 80

About Your Contact Lens Dispensing

| | Total Practices (average) | Your Practice |
|---|------------------------------|---------------|
| Of your contact lens patients, approximately what percentage wears each of the following lens replacement modalities ? | | |

| | | |
|---------------------------|-----|------|
| Daily disposable lenses | 11% | 100% |
| Two-week lenses | 36% | |
| Monthly lenses | 47% | |
| Quarterly lenses | 3% | |
| Annual replacement lenses | 2% | |

| | Total Practices (average) | Your Practice |
|--|------------------------------|---------------|
| Of you contact lens patients, approximately what percentage wears each of the following lens types ? | | |
| Soft clear spheres | 56% | 100% |
| Soft torics | 23% | |
| Cosmetic lenses | 4% | |
| Soft bifocals/multi-focals | 12% | |
| RGP | 5% | |
| | Total Practices (median) | Your Practice |
| Of your soft lens patients, approximately what percentage currently wears silicone hydrogel lenses ? | 75% | |
| During 2016, how many patients were fitted with contact lenses for the first time by your practice? | 139 | |
| During the past 12 months, approximately what percentage of your existing soft lens patients who had an eye exam was refitted with a new lens brand, material or lens type (exclude patients with power change only)? | 30% | |
| What were your total wholesale contact lens purchases during 2016? | \$66,000 | |
| What percentage of your soft lens patients wearing two week and monthly clear spherical lenses purchase annual supplies on exam day? | | |
| Two week clear spheres (buying 8 boxes on exam day) | 25% | |
| Monthly clear spheres (buying 4 boxes on exam day) | 50% | |
| Approximately how many boxes of soft lenses do you currently stock in inventory (excluding trial lenses)? | 250 | |

About Your Professional Fees

| | |
|---|-------|
| For non-contact lens wearers , what is your normal fee for a complete new patient eye examination? | \$115 |
| For new contact lens wearers , what is your normal fee for a complete exam and lens fitting for a clear spherical lens patient? | \$185 |
| For new contact lens wearers , what is your normal fee for a complete exam and lens fitting for a soft toric lens patient? | \$205 |

| | Total Practices (median) | Your Practice |
|--|-----------------------------|---------------|
| For new contact lens wearers , what is your normal fee for a complete exam and lens fitting for a soft bifocal or multifocal lens patient? | \$216 | |
| For existing contact lens wearers , what is your normal fee for a complete eye exam when no refitting is performed? | \$141 | |

About Your Practice Expenses

For each expense category, indicate your 2016 expenses:

Cost-of-Goods

| | |
|--|----------|
| Frames | \$67,000 |
| Uncut ophthalmic lenses | \$8,500 |
| Optical labs/supplies | \$35,000 |
| In-office lab equipment | \$0 |
| In-office lab staff wages and benefits | \$6,000 |
| Contact lenses | \$71,000 |
| Plano sunglasses | \$4,000 |
| Franchise fees | \$0 |
| Other | \$500 |

| | | |
|----------------------------|------------------|------------|
| Total cost-of-goods | \$244,000 | \$0 |
|----------------------------|------------------|------------|

Non-OD Staff Salaries and Benefits

| | |
|---|-----------|
| (include salaries/wages, benefits, payroll taxes, retirement plan expenses, CE expense) | \$157,500 |
|---|-----------|

| | |
|---|----------|
| Occupancy (include rent, utilities, janitorial expenses, property taxes) | \$60,000 |
|---|----------|

| | |
|---|----------|
| Equipment (include purchases, lease payments, maintenance/service contracts) | \$20,000 |
|---|----------|

Marketing & Promotion

| | |
|---|----------|
| (include Yellow Pages, Internet, print ads, TV/radio, direct mail, recall expense etc.) | \$10,000 |
|---|----------|

General Office Overhead

| | |
|--|----------|
| (include office & operating supplies, telephone, Internet, dues, training, licenses) | \$30,000 |
|--|----------|

Interest

| | |
|---|---------|
| (interest payments on purchases of equipment, vehicles, building improvements, credit card debt, practice purchase) | \$4,750 |
|---|---------|

| | |
|--|---------|
| Repair & Maintenance (include building, equipment and vehicle repair) | \$4,000 |
|--|---------|

| | |
|--|---------|
| Insurance (include building, equipment, vehicle, malpractice insurance) | \$5,000 |
|--|---------|

Employed OD (non-owner) Salaries and Benefits

| | |
|---|----------|
| (include salaries/wages, benefits, payroll tax and retirement plan expense) | \$15,500 |
|---|----------|

| | Total Practices (median) | Your Practice |
|---|--------------------------------|------------------|
| Owners Compensation (include salaries, bonus, cash draws for all owners, plus the cost of benefits and perks for payroll taxes, vehicle expense, retirement 401K/SEP, life/health/disability insurance, personal expenses paid by practice. Exclude payments and benefits provided employed ODs) | \$185,000 | |

| | |
|--|-------|
| During 2016, how much did you spend to host and manage your practice website? | \$360 |
|--|-------|

During the past 90 days, estimate the total number of hours you have personally spent engaged in each of the following activities:

Staff hiring, training/education, coaching, discipline, information sharing, staff meetings

Financial performance and budget monitoring/analysis/planning; investment analysis; accounting activities

Marketing program planning/implementation/assessment; website updates

Classification

| | | |
|---|----------|------------|
| What is your gender? | Male 73% | Female 27% |
| During which year did you graduate from optometry school? | 1995 | |
| During which year did the practice open its doors for business? | | |
| During which year did the last major remodeling of your main location occur? | 2007 | |