

140% 

increase in annual sales

71%

increase in

collections per OD hour

84% 

overall patient growth

Dr. Z is the type of owner who did not need Cleinman to be successful, she already was. Instead, she came to us to find new ways to further empower her employees, give back to the community, and to ensure every milestone became momentum for future growth. Before Dr. Z partnered with Cleinman she had acquired her first practice in 2012, and dedicated seven years to its success before launching a second cold-start location in 2019. In 2021 Dr. Z, having weathered some of the hardest days of restrictions and uncertainty of COVID-19, decided it was time to get support to continue scaling her practices at the pace she had become accustomed to. Since working with Cleinman, Dr. Z's staff are more empowered to lead, cultivating a culture where they can flourish; creating consistent, positive patient experiences and exponential practice growth.

### Key Business Improvements

- **Financial Performance:** \$3.31M annual sales in 2021, to \$7.94M annual sales in 2024. Exceeded net profit goal of achieving 20% growth, by hitting 25%.
- **Leadership and Team Development:** Empowered staff through leadership training to be a more resilient, autonomous team of 9 full-time equivalent optometrists, 40+ support staff.
- **Operational Efficiency:** Significant reduction in patient wait times and administrative burdens due to the implementation of an EHR system.
- **Digital Engagement:** Increased online presence through social media, attracting a younger demographic and expanding their customer base.

### Challenges & Goals

1. **Outdated Operational Processes:** Reliance on manual processes led to inefficiencies and longer patient wait times.
2. **Limited Digital Presence:** Minimal online engagement made it difficult to attract new patients, especially younger demographics.
3. **Change Resistance:** Resistance to change within the associate OD and emerging management teams created some barriers to execution.
4. **Financial Performance:** Achieving the ambitious goal of increasing net profit from 5% to 10-20% required significant strategic shifts and operational improvements, especially in the facility investment stage.

### Where We Come In

1

#### Digital Transformation:

Implemented an electronic health records (EHR) system to streamline patient management and reduce administrative burdens.

Revamped the website and launched targeted social media campaigns to increase digital footprint and engage with a broader audience.

2

#### Leadership Development:

Introduced workshops and coaching sessions to foster a culture of innovation and adaptability among the leadership team.

3

#### Customer Experience Enhancement:

Introduced online appointment booking and virtual consultations to improve patient convenience and satisfaction.

4

#### Team and Culture Building:

Developed initiatives to build a resilient, autonomous team and foster a positive employee culture, including team-building activities and recognition programs.

"Being part of Cleinmans' network of high-performing practices with an entrepreneurial spirit has been incredibly motivating. The peer group is filled with individuals who have inspiring ideas to share, and the consultants have unparalleled experience – there's nothing they haven't encountered."

-Dr. Z

	2021	2024	Canadian Average
Collections Per Exam	\$431	<b>\$490</b>	\$451
Collections per O.D. Hour	\$630	<b>\$877</b>	\$807
Days Receivable (Average Collection Period)	5	<b>2</b>	7
Average Frame Sale	\$196	<b>\$287</b>	\$241
Average Lens Sale	\$263	<b>\$459</b>	\$419
Total Comprehensive Eye Exams	8,825	<b>16,218</b>	10,479

## The Result



Dr. Z's transformation highlights the power of pairing entrepreneurial drive with strategic support. By empowering her team, embracing digital innovation, and strengthening operations, she has not only surpassed ambitious sales and profit goals but has also created a thriving culture that benefits patients and staff alike. The measurable results – from a 140% increase in annual sales to industry-leading efficiency and profitability – position her practices among the top performers in Canada. Looking ahead to a third location, Dr. Z is proving that independent optometry can flourish at scale when vision is matched with execution.

Cleinman Performance Partners have been helping independent optometry practices reach their goals for over 35 years. For a no-obligation exploration of your needs, [contact us](#).