



When Patients Become Customers

## **The dual nature of the eyeglass wearer**

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*September 2016*

One of the most surprising properties of light is its dual nature: light possesses the properties of classic waves as well as classic particles. The lesson on the wave-particle duality of light in physics class might have been a watershed moment for generations of students: it was at this point that they decided to not delve any deeper into the phenomena of wave and quantum physics. But we do not need to dwell on the field of physics to observe another instance of this dual nature. Instead, we need only to look at our own "physical" (and emotional) behavior when purchasing a pair of glasses.

### **Patient? Customer? Patient and customer?**

People who go to an eye care professional (ECP) with a visual impairment almost inevitably appear to have a 'dual nature.' On the one hand, these people see themselves as patients and consequently turn to experts for help correcting their visual impairment. On the other hand, these people are also the ECP's customers, and as such they have very different expectations than they do as patients. Which of these is the predominant role? That varies on a case-by-case basis and depends on different factors – beginning with the country-specific rules and regulations. In France and Brazil, for example, only ophthalmologists may perform refractions and thus determine the required correction values for eyeglass lenses. Ophthalmologists' patients receive a prescription, and these patients then head to an optician to choose a pair of glasses, making them more of a 'customer.' In other countries, e.g, the USA, Great Britain or Australia, qualified optometrists are the only institution to go to, as they are entitled to offer a broader range of services including ocular health examinations (except eye surgery), prescription of medication, refractions – and the sale and fitting of corrective eye wear.

Whatever the particular country-specific model might be, recognizing the customer vs. patient duality is the key to understanding the current trends and changes in the eyecare industry. Ultimately, the customer-side amongst eyeglass consumers is becoming significantly more dominant than the patient-side. Although there have been no systematic studies on this subject thus far, just looking at the history of glasses as a product supports this observation. After all, the aforementioned double nature is reflected in the glasses

themselves: does the patient view glasses as a (necessary) visual aid? Perhaps even secretly thinking of them as a conspicuous sign of a physical 'defect' or 'shortcoming'? Or do customers perceive glasses as a fashionable accessory, even going so far as to treat glasses as an indispensable means of expressing their own personality? Which of these two perspectives wins out? – That varies from person to person. A person's outlook may even change depending their frame of mind. A look back at history shows the larger picture: namely that consumers tend to perceive glasses less as a visual aid (patient's perspective) and more as a lifestyle consumer good (customer's perspective).

### **An additional use: a visual aid as a fashion accessory**

When ZEISS developed the world's first axially symmetric eyeglass lenses for the blinking eye with Punktal in 1912 – and thus established modern eyeglass lens technology – the



shape of the lenses and the craftsmanship of the frames initially played a secondary role. Instead, the focus was on functional features. The lenses were intended primarily to correct defective vision and were designed to be held reliably in front of the eyes by the frames – but customer priorities shifted extremely quickly. Fashion concerns became increasingly important, a change that lens manufacturers actively supported in order to remove the stigma of glasses as a type of 'crutch' or 'prosthetic' and to stimulate sales. In the 1930s, it was possible

for the first time to design and manufacture eyeglass frames featuring anti-slip lenses for optimal vision. These 'Perivist' frames could be fitted to accommodate each wearer's particular facial anatomy. The shape, dimensions and size of the face, nose and ears are decisive for positioning lenses in front of the pupils to achieve good, natural vision. ZEISS not only continues to set leading standards for customizing a pair of lenses up through the present day, but has also paved the way for completely new looks and styles. No matter if they are made of metal or plastic: today it is assumed that eyeglass frames also meet the wearer's aesthetic requirements and that the lenses are fitted properly.

Since this change, lens manufacturers have invested a lot of resources in developing features intended primarily to meet consumers' changing fashion and design requirements. These features include e.g. the size of the lenses (from quite small to extremely large) as well as their curvature (from almost flat all the way to wrapped lenses) and tints. "Luckily we've repeatedly reached milestones related to correcting visual impairments along the way,"



says Andreas Kaubisch, a trained ECP and entrepreneur from Chemnitz, Germany. "Otherwise, we'd all look great but wouldn't see particularly well," he adds jokingly.

### **The ECP's practice: somewhere between a fashion boutique and a trendy restaurant**

Andreas Kaubisch owns and runs Meise GmbH, an eyeglass store with two branches in Chemnitz. He explains what it means that eyeglasses have become a lifestyle product and how this affects modern ECPs' areas of responsibility: "100 years ago, maybe even 50 years ago, the ECP was seen as more of a craftsman than a salesman. At its essence, our work is still a craft – but increasingly people don't perceive it that way. One factor is that you're more likely to find an ECP's practice at a strip mall between a fashion boutique and a trendy restaurant, rather than on a side street between the cobbler and the tailor." Consequently, ECPs must treat those entering their practices less as patients and increasingly as customers if they want their business to survive. And it is even more important that they understand what self-image and requirements customers bring to the table these days – consciously or unconsciously. "A good product or a great slogan is no longer sufficient by itself," explains Kaubisch: "At least not more than once."

Kaubisch is alluding to the so-called 'Customer Journey.' Put briefly, this marketing term denotes the customer's progress from first noticing a product to their aroused interest and the accompanying thoughts of buying it all the way to their concrete intention to buy and the actual purchase. During the Customer Journey, each customer comes into contact with the products and the sales person via diverse touch points. The sum of the episodes over the course of this journey at the different touch points is called the Customer Experience. Kaubisch says: "The customer will only come back if the entire Customer Experience is positive. The key word here is customer retention. Admittedly, this revelation is not necessarily brand new. In our field, personal recommendations have always carried a lot of weight. What is new, however, is the continuously growing information opportunities and consequently customers' growing sophistication – all this increases customer expectations." On top of this, customers' rising expectations are shaped not so much by direct competition, but rather by those companies leading the way with the optimal Customer Experience. "The bar is being set higher and higher, and the customers are becoming increasingly empowered. As ECPs, we need to continually up our game," says Kaubisch.



## **A new experience at your ECP: the ZEISS Vision Center**

Kaubisch is one of those entrepreneurs who recognized this transformation early on, prompting him to open one of the first ZEISS Vision Centers worldwide five years ago in addition to his existing stores. "There are more than 100 ZEISS Vision Centers on five continents today, all of which offer a very special Customer Experience. We call this the ZEISS Experience," explains Zander Hattingh, Director of the ZEISS Experience at Carl



Zeiss Vision International GmbH. The ZEISS Experience is based on a holistic and comprehensive design to meet the dramatically increasing customer demands. Straightaway the most obvious feature is the almost timeless, multiple award-winning design of the ZEISS Vision Center. With its clarity and precision, it reflects the values of the ZEISS brand and

makes an important contribution to bringing the brand front and center.

## **The strength of the brand – in both the frames and the lenses**

"Since nearly all well-known brands also come on market in the form of frames, entrepreneurs have a difficult choice when deciding which logo they should display in their stores. What's 'in' today might already be 'out' tomorrow. Moreover, with many different brands it's almost impossible to set yourself apart from the competition," says Hattingh. Focusing on the ZEISS brand affords clear benefits in this situation. As a lens manufacturer, ZEISS is not competing with the almost incomprehensibly vast world of brand-name frames. With more than 160 years of tradition and experience in the optical industry and as the inventor of modern eyeglass lenses more than 100 years ago, ZEISS stands for quality, innovation and better vision in a way no other global brand does. "These attributes enable us to offer the ECP the necessary differentiator to stand out from the crowd. By focusing consistently on the leading brand in the world of optics, we help ECPs evolve their business in a unique way. To do this, we provide the latest technology for examination and fitting and we offer training courses and coaching to further educate ZEISS Vision Center employees. We also support ECPs through additional business processes and make marketing tools available. The crucial thing – and this is the most important point by far – is that the ZEISS promise of quality is transferred to the entire Consumer Experience, transforming it into the one-of-a-kind ZEISS Experience," explains Hattingh.

## No compromises

Making good on this promise of quality is based on multiple pillars. In addition to the outstanding design of the ZEISS Vision Center and the very high-end, comprehensive product portfolio of ZEISS lenses, the cutting-edge ZEISS systems for eye measurements and fittings and, in particular, the accompanying ZEISS Vision Analysis all play a very important role. ZEISS Vision Analysis is a transparent and interactive step-by-step approach which determines the customer's particular vision requirements systematically and reproducibly. To achieve these results, the opportunities afforded by advancing digitization are used consistently. For Kaubisch, these are more than just technological gimmicks: "The tablet computer-based guidance of ZEISS Vision Analysis – to take just one example – is extremely important for the entire consultation process and ultimately for the customer's overall experience. This technology provides me with all the customer data on a single, uniform platform, making the subsequent ordering process easier and significantly faster. At the same time, the tablet assists me during the consultation when it's time to select the lens design." Using virtual reality, certain features can also be displayed within the scope of ZEISS Vision Analysis such as vision zone distribution on the lens or different coatings, giving the customers an initial impression of the alternatives available.

## With the ZEISS Experience, it's the consumer who decides instead of the ECP



In the traditional consultation process – i.e. without ZEISS Vision Analysis – things do not usually progress this far.

"Time and time again I see that my customers – no matter how well-informed or empowered they are – almost always fall back completely into the role of the patient when asked what lens design would be most suitable for them," says Kaubisch. "They expect a recommendation from their ECP

and then take it. Personally, I find this 'roll reversal' somewhat paradoxical because improving your vision is the very reason you go to the ECP in the first place. When asking this pivotal question about the 'right' lens, the 'patient' really has to be an informed 'customer' in order to have a say in the matter."

It is precisely at this point that the ZEISS Experience with its inherent ZEISS Vision Analysis has its greatest impact. First, the subject of 'vision' (eyeglass lens) as a whole is brought to the forefront as compared to the subject that typically dominates: 'appearance' (frames). Second, it enables the customer to make an informed decision so that their choices completely meet their vision needs.



"With the ZEISS Experience, the consumer makes a conscious and well-informed decision concerning the lens that's right for them," says Hattingh. "This creates real added value for the customer – and ultimately also for the ECP." To date, customers' experiences at the more than 100 ZEISS Vision Centers have made one thing clear: the amount of money consumers are willing to spend on eyeglass lenses increases with their level of knowledge about the essential characteristics of the lenses. Consumers who are more aware of how the lens design, material, coatings and the accompanying affects their life are prepared to spend up to 70% of their budget for glasses on the lenses themselves. Hattingh says: "When ECPs also more actively involve their customers in selecting lenses, then there is less risk of difficulty adjusting to the new lenses or a customer being unhappy with the final product." The ZEISS Experience thus lays the solid foundation for a long-term customer relationship that works well for both sides.