

OPTICAL PERFORMANCE REVIEW

Employee Name: _____
 Position: _____ Date of Hire: _____
 Last Review Date: _____ Current Review Date: _____
 Evaluator: _____

Evaluation key			
1. Does not meet expectations, needs improvement			
2. Meets expectations, performs at consistent acceptable levels most of the time			
3. Exceeds Expectations, performs consistently all of the time			

Our overall mission is to create patients for life by ensuring that every patient feels welcomed and they have received the highest level of excellence as well as outstanding patient care.

Building Patient Relationships

10% Total Weight

Welcoming the patient	1	2	3
Always a smile in voice	1	2	3
Identifies self to patient	1	2	3
Shows concern about making every patient feel welcome and comfortable in a friendly manner	1	2	3
Does not prejudge a patient	1	2	3
Treats patients as to the way they would wish to be treated	1	2	3
Telephone answered promptly, patient’s needs are identified and responded in a friendly manner	1	2	3
Lifestyle needs are consistently executed including pre-assessing and the doctor hand off	1	2	3
Makes or verifies future appointments	1	2	3

Building Team Relationships

10% Total Weight

Supports practice goals	1	2	3
Supports department goals	1	2	3
Fulfills responsibilities of the job	1	2	3
Promote enthusiasm and teamwork	1	2	3
Fosters positive working relationships with doctors and other associates	1	2	3
Positive communication between opticians, manager and other departments	1	2	3

Operations

10% Total Weight

Paperwork	1	2	3
Pays close attention to detail	1	2	3
Documentation to convey communications	1	2	3
Notify patients when orders are ready in prompt manner	1	2	3

Sales AVERAGE SALE: _____

35% Total Weight

Asks questions / likes and dislikes regarding previous eyewear	1	2	3
Listens carefully to determine problems	1	2	3
Pays close attention to detail	1	2	3
Explains features, advantages & benefits of product	1	2	3
Matches lens style to patient needs	1	2	3
Matches options to patient needs	1	2	3
Uses realistic time frames in promising a job especially custom orders	1	2	3
Takes responsibility in regards to follow through	1	2	3
Learning new product information	1	2	3
Continues to seek knowledge through continuing education	1	2	3
Applies knowledge learned to improve self and patient service	1	2	3
Offers second pair	1	2	3
AR goal (1=10% below goal, 2= goal, 3 10% above goal)	1	2	3
Transition goal (1=10% below goal, 2= goal, 3 10% above goal)	1	2	3

Dispensing

15% Total Weight

Informs patient on care of lenses, frames, warranty	1	2	3
Verifies accuracy of the order	1	2	3
Sets stage for return visits to adjust eyewear	1	2	3
Thanks a patient for allowing us to serve their needs	1	2	3

Creating Patients for life

20% Total Weight

Field complaints with performance of product or refraction	1	2	3
Determine appropriate action to satisfy a problem quickly	1	2	3
Communications with lab if not able to ensure good service	1	2	3
Is flexible with patient flow and fluctuates lunch / break times	1	2	3

Remake/Refund/Warranty

Average_____

Patient Satisfaction

Average_____

Other: