



IDEOLOGY
C O N S U L T I N G

Director Profile

Mark Overton

PRIVATE AND CONFIDENTIAL

Summary

Mark has been a Director and Principal Consultant at Ideology for three years.. With both science and business qualifications and an extensive 28 year portfolio of experience working in both public and private business in general management, consulting and professional service roles he is able to pass on a depth of experience and knowledge to businesses he works with.

He has worked with major public hospitals, Federal government, small and medium private businesses, medical research institutions, professional associations and has consulted to over 500 optometry practices and other small businesses across Australia and lectured at universities. Mark has also been at various times a window cleaner, packing case assembler and scrap metal laborer and has a great empathy and understanding of business from the ground up.

His many interests include philosophy, wine (often together), fly fishing and weekends away in the bush.

Qualifications

Master of Business Administration (MBA)

Macquarie Graduate School of Management, Leadership, Strategy & Change Management

Bachelor of Science

Diploma of Applied Science

Member Australian Institute of Management

Experience

- 12 years experience in optometry practice management, consulting and general business operations
 - Business Manager – ProVision
 - General Manager – Eyecare Partners
 - Director – Ideology Consulting
- 20 years as a practicing health professional and service manager
- Strategy development, planning, budgeting and opportunity identification
- Owner/manager mentoring and support
- People and performance management experience
- Practice performance analysis
- Quality management and accreditation
- Optometry and dispensing service provision and management

- Post-graduate and professional education
- University undergraduate and professional lecturing and education
- Health and professional services management

Specialisations

Optometry and other allied health practice management

Business planning, organisation and management

Practice performance management and profit improvement

Creative development

Quality Management

Professional management education

Current Clients

- Eyecare Plus - 200+ independent practices assisted with education and resource development
- Eyecare Partners – Publicly listed company owning 38 optometry practices (Eyecare Plus Member)
- Mivision Magazine – Business planning, development and strategy
- Australasian College of Behavioral Optometrists – Planning, structure and development
- Australian Optical Dispensers Association - Planning, structure and development
- **40+** independent optometry practices Australia-wide including:
 - Mt Isa Optical
 - Russell Jones Kelly – Coffs Harbour NSW
 - The Eye Gallery – South Yarra, VIC
 - Pezzimenti Optometry – Hawthorn, VIC
 - Wimmera Eyecare – Horsham, VIC
 - Innisfail Optical – Innisfail, QLD
 - Thompson Larter Lee & Assoc – Pennant Hills, NSW
 - Gawler Optical – Gawler, SA
 - Eyes of Claremont – Claremont, WA
 - Kevin O’Brien Optometrists – Singleton NSW
 - Franz Felfer Optometrists - Yamanto QLD
 - Eyes in Design – Mossman – NSW
 - Rooney & Parsons – Adelaide, SA
 - Young Eyes – Young and Orange, NSW

- Kosmac & Clemens - Central VIC

Philosophy

The optical industry has never been more competitive. Practice strategy and strategic alliances have never been more important. It makes good business sense to regularly review your business relationships, and now is a good time to consider what value you are getting and if you can do better elsewhere.

As an independent business advisor with no allegiances or commercial ties, Ideology Consulting can give you an honest view of your practice in your interests only. We can show you how to get the best possible results for you and your patients, and help you to shape your practice's future.

In 2011 our clients total sales increased their sales and patient numbers significantly:

- Monthly sales average up more than 13.0%
- Monthly average consultations up more than 20%

How We are Different

- We believe each client is unique and our advice is tailored to you and nobody else
- There are no long term contracts or commitments. We know you'll stay as long as we deliver value
- We work only for you and your interests
- We don't work for the guy down the road as well as you.
- You can call anytime you need us, day or night
- We have resources and tools developed especially for optometry
- We have a network of specialists to help in specialist areas
- We know optometry and all its diversity



IDEOLOGY
C O N S U L T I N G

Optometry Services

Introduction

No matter what type of practice you own, Ideology Consulting provides high quality business advice, resources and education that is practical and produces results. It's your practice and we are here to help you.

The services outlined on the following pages are designed to be tailored specifically for your practice.

We believe that each practice is unique, even if you are part of a larger group, and we need to take into account and preserve these important practice features.

When our work with your practice is finished we will have not only help you make the changes you wanted to see, but invested our knowledge into your practice. You will have achieved an on-going benefit and positioned your practice for future growth.

Ideology Consulting is an independent advisor to the optometry industry. We have no affiliation to any group or company. We work only for you and your interests.

Our objective at all times is to deliver what you want, when you want it, and to ensure your practice is stronger, more effective and more profitable than ever.

Thank you for considering the following information and we look forward to hearing from you if we can help in any way.

**Mark Overton****Director**

Business Planning

“If a man does not know to what port he is steering, no wind is favourable to him.” Lucius Annaeus Seneca c. 4 BC – 65 AD

Planning is the key to getting things done and making things happen. A business plan is essential if you are serious about a successful practice.

A planning session facilitated by Ideology Consulting provides you with an opportunity to look critically at your practice and decide what needs to be done to improve it and when.

The plan can reflect your ambitions and dreams for the future and guide you through implementation process.

Ideology provides a business planning service for optometrists to help you achieve your objectives. Using information gathered before and during a planning session our advisors will write your plan for you, then present the completed plan and provide support to make it reality.

Our comprehensive plans will:

- Improve your profitability and sales
- Develop sophisticated and best practice patient care
- Provide a detailed and developed understanding of you strengths and weaknesses
- Review and revise your strategic position and management of competitors
- Ensure the whole practice team is focused and motivated
- List specific actions and activities allocated in achievable time frames.
- Help you makes changes become reality

You also get

- an extensive collection of resources, letters, notes, templates and marketing materials
- Personal support and advice
- Inventory assessment and plans

Of course you can ring Ideology for assistance and advice at any time, day or night, if you are unsure or things change.

Marketing Plans & Strategy

It is increasingly important to know who your patients are, what they want and how they want it delivered.

Marketing is an essential component of all business plans, but for most practices, a separate Marketing Plan is a valuable strategic tool.

We work closely with you to develop plans that are achievable, and are focused on practical and profitable outcomes to improve your sales.

We help you develop a coordinated and affordable program of marketing that will support the overall plan.

Then, if you need it, we help you get it done, measure the results and evaluate the outcome.

A marketing plan will

- Set you in the right direction for marketing
- Improve market share and patient numbers
- Build practice profile in ways that will combat competitors
- Develop your “brand” and image
- Manage resources and costs
- Detail actions, timelines and responsibilities
- Evaluate product and inventory management

Your marketing plan will be coordinated with your practice objectives and resources to ensure you get the best possible “bang for your buck”.

Benchmarking performance & efficiency

Most practices can quickly improve their efficiency and profits by making small changes to the way they operate.

An “outside eye” can often see the lost income opportunities and identify elements and processes that are costing the practice money, time, labour and unnecessary worry.

These can be corrected for the benefit of all, and new targets set for the future.

Using industry references for performance excellence and your own data we can review your entire practice and work out where you can achieve maximum improvement.

Ideology will provide you with an easy to read report with practical recommendations to make your practice as good as it can be. Then, if you need it, we will help you make the changes happen.

Our benchmarking will

- Detail where you can improve your practice
- Focussed efforts on problem areas
- Outline measureable improvement opportunities
- Provide comparisons against industry standards and the best in the country
- Link to patient surveys and focus groups

Coaching & Support

As an optometrist and a business owner and a manager you make important decisions every day.

Ideology Consulting can assist you to uncover the best way forward with your practice in its own unique context.

If you would like another perspective that you know is there for you and only you, we can help.

Our advisors will stand by you and help you make the tough decisions, set realistic and targeted goals for you and your business.

We will provide you with objective and personal support and advice about your own performance, strengths and weaknesses. Our objective is always to educate you and develop your skills, not make you dependent on us.

We will help you to improve the way you manage your practice by:

- Helping you to define practice objectives and direction
- Providing management skills assessment and education
- Confirming and supporting your business and professional decisions
- Developing an understanding of your unique issues
- Assessing your personal management style and developing you as a manager

You can call us and we will be available at any time if you need a friendly ear.

Change Management Assistance

All practices need to change all the time.

Our years of experience with optometry practices tell us that the ability to effectively bring about change is a key competitive advantage. It often sets apart the highly successful from the rest of the pack.

However we can be certain that all change, whether good or bad, has the potential to be disruptive and unpleasant if it is not planned and managed carefully.

Change management is one of the most complex challenges for any practice but intense planning and adherence to some basic principles will usually bring about the desired result.

Ideology can ensure you to:

- Plan the change process
- Identify the important steps and pitfalls
- Develop a powerful team and sense of purpose
- Identify the barriers, drivers and key persons
- Keep you focussed on the ideal outcome
- Actually make change happen

Succession Planning

Are you thinking about moving out of your practice or retiring?

Perhaps you are considering joining a group or franchise and would like to look at all your options?

There are many important decisions practice owners make during a lifetime in business, and one of the most important is how to bow out gracefully, effectively, and profitably. Careful succession planning maximises the value of any practice.

All succession plans take time. Your options will be limited unless you have planned well ahead. Unfortunately many practices do not consider the implications and interrelation of the elements that decide if you can achieve your preferred option.

Our succession planning services include:

- Helping to identify options, key people and time lines
- Evaluating the positives and negatives of each one and develop a clear written plan
- Assessing the potential to improve your practice return on sale.
- Assist and refer for formal valuation
- Helping you find succession candidates and negotiate a way forward

Our objective is a smooth transition and continuation of leadership and operational management throughout the practice, and achieving the best exit result for you in your preferred time frame.

Staff Performance Management and Structure

Your staff are your most valuable resource and represent a major investment.

Under performing staff can and will cost you money and market share. Once described by a client as “jelly wrestling with no beginning and no end”, many practices struggle to organise and manage their staff as well as deal with customers, suppliers, family and all the other daily pressures.

Ideology can provide assistance and resources to keep you and your staff productive and happy.

We can:

- Set up and help you conduct performance appraisals, coaching and education
- Develop a plan for staff and team performance management and strategy
- Provide job descriptions and employment conditions
- Support and guide you in managing staff problems
- Review your staff structure and staffing levels for efficiency
- Improve motivation and communication
- Help with recruitment, selection and employment.

Practice & Staff Education

A study in the Harvard Business Review showed that businesses who educate their staff consistently out-perform those that don't educate.

A commitment to education underpins everything that Ideology does with its clients.

We offer a broad range of practice related education in key areas that is delivered in a cost effective way with minimal disruption. Almost any aspect of practice management and operations can be covered. Just let us know what you need, or we can help you identify knowledge gaps.

We will come to you, when you would like us there, and arrange for everything. Whether it's an hour at the end of the day with pizza, wine and beer (very popular with small teams and practices), or a full day at a function centre, we have it covered.

Some popular subjects include:

- Sales and sales improvement
- Patient care processes
- Managing quality and customer feedback
- Stock management and selection
- Marketing for optometry
- Leadership and management – the good and the bad.

Practice Resources and Documents

Have you been meaning to finish that Policy and Procedure Manual and never had the time? Or never did get around to sorting out the staff job descriptions?

We can take care of these for you in a timely and economical way. Ideology has many of the basic practice documents and resources available and can tailor to your requirements.

Some of the available resources include:

- Policy and Procedure Manual templates
- Specific Policy documents
- Recall letters
- “Welcome to the Practice” forms
- Job descriptions
- Patient surveys
- Warranty information
- Confidentiality Agreements

This is a broad sample of the services and intellectual property we provide to our clients. If you have any other requirements please let us know and if we can't help we will recommend someone who can.

We look forward to meeting you and thank you for considering Ideology Consulting.

Kind regards

Mark Overton

0409233901

mark@ideologyconsulting.com.au

Ever Wondered How you Compare?

Ideology Consulting now offers a comprehensive monthly benchmarking report to clients. This is a very important service that provides significant benefits to clients.

How do we do it?

- Benchmarking is completely confidential, No practices are identified
- Reports are produced and distributed to participating practices each month
- We use existing KPI reports from practice software that you send to us
- Reports are presented in a friendly and concise style to keep your time to a minimum
- There are no contracts, agreements, memberships, or other obligations.

The Report

The report will contain:

- Comparative figures and percentages for KPI's for each practice for a given month
- The Month average across all practices
- The change from the previous month
- Trend graphs for KPI's for the last 6 months or longer
- Comments and relevant economic and industry information affecting figures

Our Experience

Ideology Consulting has extensive experience in management of health sector businesses backed by formal qualifications in health practice and business. We have detailed knowledge and experience in optometry. Ideology currently assists some of the best independent practices in the country.

How to Participate

Simply complete and send to attached form to Ideology Consulting and we will contact you to discuss in more detail.

Contact Details

Ideology Consulting

Mark Overton
43 Heacham Road, Eltham North, Victoria
3095
Ph: 0409 233 901 Fax: 03 9431 1169
Email: mark@ideologyconsulting.com.au

Costs

- A fee of \$55 per month for a single practice is charged to clients for this service.
- Fees for multiple practices vary. Please contact us for a quote.
- Clients subscribing to Ideology Consulting's regular service arrangements have benchmarking included.

Effective and Affordable Customised education?

Every business needs to train their staff. It's what makes you different. Good focused and needs specific education can be hard to arrange, but Ideology Consulting can help.

How do we do it?

- We come to your business or preferred location. This minimizes down-time and you can get the whole team involved
- We deliver the education you need now. No waiting for other peoples programs to roll around.
- We focus specifically on your team and situation.
- You decide how much you need or how long the training goes for.
- There are no contracts, agreements, memberships, or other obligations.

The Topics

Tell us what you need and we will deliver it for you. Popular subjects include:

- Improving Customer Service and Care
- Leading Successful Change
- Why and How People Buy
- Team Performance Essentials
- Business Basics

Costs

- 2 hours training at your business = \$550 inc GST
- A full day at your business or other location = \$1,100 inc GST
- We can customize times and locations to suit your needs. There is no limit on staff numbers attending
- Any associated expenses for travel and facilities are charged at cost. Melbourne metro area at no extra charge

Our Experience

Education is delivered by experienced and highly qualified staff with a detailed knowledge of the optical industry. Ideology staff have delivered education at under-graduate, post-graduate levels in universities, and at local and international professional conferences.

How to Book Education

To book an education session please complete and return the attached form and we will get back to you very quickly to confirm details or simply send an email and we will call to discuss your requirements.

Contact Details

Ideology Consulting

Mark Overton

43 Heacham Road, Eltham North, Victoria 3095

Ph: 0409 233 901 Fax: 03 9431 1169

Email: mark@ideologyconsulting.com.au