



Why should we track stats?

- Numbers don't lie.
- If you can't Measure It, you can't Manage It.

Stat Definitions

What are we measuring in the stats sheet?

Task	Start	End	4/23/17	4/24/17	4/25/17	4/26/17	4/27/17	4/28/17	4/29/17	Work to Date	Who is Responsible
1. Review Status											
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Where To Start . . .

Which stats do you begin with
and who is responsible?

A	B	C	D	E	F	G	H	I	J	K	L	M
2												
3	Statistics (Core Stats 1 - 8)	Format	Sun	M	T	W	Th	F	S	Week	Who's	
4		Date		12/20/17						to Date	Responsible	
5	1) Gross Sales	\$								\$0	FC	
6	2) Charge	\$								\$0		
7	3) # Full Exam KEPT	#	0	0	0	0	0	0	0	0		
8	# New patients	#										
9	# Established patients	#										
10	% New patients	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
11	% Established pts	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
12	Total cost patient	\$	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		FC
13	% Receipts per patient	\$	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
14	% Total Receipts/Revenue	\$										
15	Insurance Write-offs	\$										
16	% Insurance Write-offs	%										FC
17	% Percentage BOOKED	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
18	% Exam BOOKED	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
19	% Percentage KEPT	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		

20	% Percentage KEPT	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
21	# Discount	#										
22	# Freight In/Out	#										
23	# Freight kept	#										
24	% Freight In/Out	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
25	# Endorsement	#										
26	# Apps Made	#										
27	% Apps	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		FC
28	# Shopper conversion	#										
29	Cash received	#										
30	# Apps Made	#										
31	% converted	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		CC
32	Total CL Events	#										
33	Percentage CL Fts	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
34	Percentage Annual Supply	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
35	# of Optimal Ret. Image	#										
36	Optimal Ret. Image %	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
37	Total Clinical Sales	\$	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		

38	% converted	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
39	Total CL Events	#										CC
40	Percentage CL Fts	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
41	Percentage Annual Supply	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
42	# of Optimal Ret. Image	#										
43	Optimal Ret. Image %	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
44	Total Clinical Sales	\$	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		

40	Total Optical Sales	\$	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	OC
41	Frames	\$									
42	Lenses and Treatment	\$									
43	Percentage Optical Sales	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
44	Total Optical Sales	#	0	0	0	0	0	0	0	0	
45	Frames	#									
46	Lens Pairs	#									
47	# Pts w/Chc in optical	#									
48	# Pts w/Chc 1 or more Rpt	#									
49	% Rpt Contact Lens	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
50	Total Multiple pairs	#	0	0	0	0	0	0	0	0	
51	Frames	#									
52	Lens Pairs	#									
53	Percentage Multi Pts	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
54	Total Sunglasses	#	0	0	0	0	0	0	0	0	
55	# of Sun Lenses	#									
56	# of Sun Lens Pts	#									
57	Other	#									
58	Percentage Sales	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
59	Optional Optical Sales	#									
60	Prescription Adj	#									
61	Transitions	#									
62	Prescription Trays	#									
63	Other	#									
64	Percentage Adj	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
65	Transitions	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
66	Prescription Trays	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
67	Other	%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
68											
69											

Now Let's Take a Look ...

Monthly Tab

1. How to interpret the data
2. Setting Goals

Comparative Yearly Tab

1. How to interpret the data
2. What to do with it

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	September	October	November	December	Year Total
Budget	100	100	100	100	100	100	100	100	100	100	100	100	1200
Actual	105	95	110	90	100	115	105	110	100	115	105	110	1280
Variance	5	-5	10	-10	0	15	5	10	0	15	5	10	80

Thank You!

Please feel free to send questions and comments to bogden@thewilliamsway.com
