Dispensary Scorecard

Prepared for **a single-doctor practice** · **Sample month.** Illustrative, built from example inputs: about 200 exams, 50% capture and a $250 average sale.[1] **Your own point-of-sale data replaces every figure from month one,** and your busy and slow months are compared with the same months last year.

REPORTING MONTH	EXAMS (EST.)	POINT OF SALE	PREPARED BY	REVIEW CALLS
Sample	**~200**	**Your POS**	**Patrick Gibson, LuxeVista**	**One owner call a month**

MEASURE	THIS MONTH	SAME MONTH LY	GOAL	GAP	MONTHLY $ AT GOAL	STATUS
TRAFFIC INTO THE DISPENSARY						
Exams completed The number everything else is measured against	200	from your POS	track	—	—	New
CONVERSION — THE WALKOUT						
Capture rate Share of exams that leave with eyewear	50%	from your POS	55%	**−5 pts**	**+$2,500**	Action
Pairs dispensed At 55% capture on the same exams	100	from your POS	110	**−10**	included	Action
Patients leaving without buying Already paid for. Already in the building.	100	from your POS	90	**+10**	—	Action
Capture rate by payer Which plans convert, and which do not	—	—	track	new	—	New
VALUE OF WHAT IS DISPENSED						
Average sale Every $10 recovered ≈ $1,000 a month at today's volume	$250	from your POS	$265	**−$15**	**+$1,650**	Action
Second-pair rate Sunwear, computer, back-up	—	—	track	new	—	New
Frames over $120 Share of the board actually being presented	—	—	track	new	—	New
Sales by team member Who is converting, and who needs coaching	—	—	track	new	—	New
Dispensary revenue 100 × $250 today vs 110 × $265 at goal	$25,000	from your POS	$29,150	**−$4,150**	**+$4,150**	Action

DISPENSARY UPSIDE AT GOAL

+$4,150 / month

About $49,800 a year from the same exams. No new patients required.

BIGGEST LEVER TODAY

Capture no cost

50% to 55% on ~200 exams is 10 more pairs a month. Each point ≈ $500.

BIGGEST LEVER NEXT

Average sale no cost

$250 to $265 is $1,650 a month at 110 pairs.

THIS MONTH'S THREE ACTIONS

1. Count the walkout daily for two weeks. Nothing changes until it has a number on the wall.
2. Look at the handoff from the exam room: who walks the patient over, and what they say first.
3. Start recording second pairs and frames over $120 by team member.

Sample scorecard; illustrative figures, not a forecast. Example inputs are not published averages and are replaced by practice-provided data in month one. Sources:

1. Example inputs chosen by LuxeVista Advisory Group for illustration. LuxeVista Advisory Group provides business advisory services only; not CPAs, tax advisors, attorneys or licensed financial advisors. Projections are estimates, not guarantees. Confidential — do not copy.

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Clinic Scorecard

Same month, same patients. **You already own corneal topography, OCT, visual fields and digital retinal imaging.** The capital is spent and the patient is already in your chair. This page tracks how much of that technology is being used for patients who need it, so the clinic side of the practice grows with the dispensary. Dollar goals are set from your own fee schedule in month one.

REPORTING MONTH	EXAMS (EST.)	POINT OF SALE	INSTRUMENTS OWNED	REVIEW CALLS
Sample	**~200**	**Your POS**	**Topography · OCT · VF · Imaging**	**One owner call a month**

MEASURE	THIS MONTH	SAME MONTH LY	GOAL	MONTHLY $ AT GOAL	STATUS
TECHNOLOGY YOU ALREADY OWN					
Retinal imaging acceptance Share of exams where imaging is offered and accepted	not tracked	—	track	set in month 1	New
OCT scans performed Glaucoma suspects, AMD, diabetic monitoring	—	—	track	set in month 1	New
Visual fields performed Glaucoma monitoring and field loss	—	—	track	set in month 1	New
Corneal topography performed Contact lens, specialty and surgical evaluation	—	—	track	set in month 1	New
ROUTING AND RETENTION					
Visits billed to medical rather than vision Set from your own fee schedule once we see it	—	—	track	tbc	New
Patients referred out for medical care Each one retained is ongoing clinic revenue	—	—	track	—	New
Recall / pre-appointing rate Keeps your busy months full and your slow months steady	—	—	track	—	New

Why this is worth watching. The exam, the lane and the staff are already paid for, and so are the instruments. A test adds minutes of technician time and no inventory, so most of each dollar falls to profit. The scorecard shows how much of that is happening today.

A note on your calendar. Every practice has busy and slow months. Each month is compared with the same month last year, so a seasonal swing is not mistaken for a problem. Please confirm all billing and coding with your own biller.

RECOMMENDED SEQUENCE, OVER YOUR FIRST 90 DAYS

1. **Days 1–30 — baseline.** Pull your point-of-sale reports, count each test by type, and set your own goals from your fee schedule.
2. **Days 30–60 — the handoff.** Look at how the doctor hands each patient to the optician, and at what is offered in the clinic lane.
3. **Days 60–90 — decide.** With months one and two in front of you, choose where to focus next.

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