



Acquios  
ADVISORS

*Insight that inspires*

Overview of  
Services

## WHO WE ARE:

The Acquios Advisors Team is proud of our 84+ years of experience in the Optometry field. Prior to becoming Advisors for offices, each of our Advisors worked in Optometric offices in various roles. We have experienced the challenges you face, and have developed solutions to guide you to be successful. *We've been in your shoes.*

Our Advisors have been trusted to walk alongside over 1,000 offices. We assist in improving the bottom line, the quality your culture, and so much more. We know there are no 'cookie cutter' solutions for any office, each office has its own unique needs and goals. Our mission states, **"We listen with compassion and collaboratively work to develop and implement a plan to help you and your team. We deliver Insight that Inspires."**

## OUR TEAM:

### Rick Guinotte, CEO and Advisor



Rick has worked in the optometric field since 1989 – as a technician, optician, receptionist, manager, and as the territory director for 18 practice locations, \$13.5 million in revenue and 120 employees.

In 2009, Rick left his position with one of the world's leading frame manufacturers to become an advisor. Since then, he has worked with offices seeking growth and improved efficiencies, and he has helped people improve their team atmosphere, put systems in place to increase cash flow, and set goals for their practice locations. He is focused on helping his clients understand how to achieve and exceed the goals they've set.

Rick has worked with doctors in all aspects of their professional career, from opening their first locations who have gone on to quickly exceed revenue expectations. He has helped clients relocate, add associates and develop exit strategies. He also gives presentations throughout the United States, Canada and beyond, sharing his insight and inspiring others.

Rick and his wife Debbie have three children. Their oldest is in Graduate school, their second oldest is studying Biology, and the youngest is in High School. He enjoys hiking with his family and running.

### Kirk Kastens, Vice President and Advisor



Kirk has worked in the optical industry since 1998, holding positions in private care practice as an office coordinator, and then as an advisor to private optometric practices.

Kirk has been advising offices since 2005, working with more than 500 practices in the United States and Canada in this time. Kirk shares his expertise in Human Resources, Marketing, Operations and Financial Management with private care practice owners and paraoptometric, in multi-practice training sessions, and through phone consultations. Kirk also travels throughout the United States and Canada for various speaking engagements, where he is able to share his knowledge with Optometrists and their teams.

In his consulting work, Kirk covers the broad spectrum of practice development, from putting together a business plan that fits a doctor's goals to helping a staff member improve his or her ability to educate patients. His passion for the industry continues to grow as he works closely with practice owners to establish key processes critical to long-term success.

Kirk and his wife Cindy have three children. He enjoys watching their activities and staying competitive through golf and running 10Ks and half-marathons.

## OUR TEAM, continued:

### Tim Merrigan, Advisor



Tim has worked in the optical industry since 1992. He has held various positions in both the corporate and private sectors of the optical industry. He has been responsible for managing as many as 29 offices, and he has overseen

the development and implementation of a variety of operational processes and procedures.

In 2013, Tim left a private practice to become a consultant to help private practice optometrists. He has worked with more than 80 offices in the United States and Canada.

Tim's areas of expertise include human resource management, staff training and development, employee retention, accounting and budgeting, and adjusting cost of goods levels.

Tim has helped practices achieve success through financial controls, setting goals along with expectations and working with doctors on how to train and develop their team to meet those goals. "Everyone wants to be successful, we just sometimes need direction on how to get there," Tim explains.

Before getting into the Optical Industry, Tim spent three and a half years refereeing for the Harlem Globetrotters. He has called a basketball game in over 70 countries and all 50 states. He says the jump from officiating to optical was a no brainer because everyone knows that referees have great eye sight. "I have never missed a call, just ask me!" says the former referee,

### Sarah Lier, Project Coordinator



Sarah joined the Acquios Advisors team in January 2016. She has been in the industry since 2013, providing bookkeeping and payroll services to Optometrists throughout the United States. She has a thorough knowledge of an

Optometry office's financials, and thus a deep understanding of the services delivered at Acquios Advisors. Since joining Team Acquios, Sarah has had the chance to share her Accounting, Payroll and Human Resource expertise with Acquios clients.

Sarah is the "right hand" to our Advisors and can be found maintaining the company's Social Media presence via the Website and Facebook, putting together presentations for webinars or Workshops, creating new tools for our clients, making sure each client is scheduled for a call, among many other tasks.

Sarah shares a passion with the Acquios Team for client success. Whether it be financial growth or personal growth, Sarah enjoys walking with doctors and their teams as they find their definition of what success means to them.

Sarah and her husband, Drew, have two young daughters. Sarah enjoys spending time with her family, staying active with various types of exercise, coming up with healthy recipes for her family, and get togethers with friends.

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## WHO WE WORK WITH:

We work with Professional Practices throughout the United States and beyond. We work with you - the owner - as well as the individuals in your office. We guide your team members to understand how they will make their career with you better, not only for themselves, but most importantly for the patient. When the service is better for your patients you see the results in increased revenues.

## WHAT WE DO:

We discuss your concerns, thoughts and processes you are currently executing. We identify your opportunities, we assist you to improve efficiencies in your practice by developing your business plan which may include, but will not be limited to the following:

- Develop your Cash Flow Projection
- Identify your Breakeven Point
- Improve Patient Flow and Efficiency
- Track Key Metrics
- Increase Profitability
- Increase Receipts per Patient
- Increase Production and Efficiency in your Optical
- Improve Employee Relations Implement Human Resource Tools
- Conduct On-Site Visits
- Practice Valuations
- Develop and Execute a Marketing Plan
- ABO and COPE approved Speaking
- Deliver multiple workshops per year
- Prepare and Guide for bringing on an Associate
- Transition Planning
- Unlimited Access to Library of Recorded Presentations and Monthly Webinars

## TEAM DEVELOPMENT AND CULTURE

Team development and culture is critical to every business. Acquios Advisors recognizes the value of your team, for this reason we work with you to create processes to increase team/owner communication. We guide you to develop the tools necessary to empower your team to work better with you and create a culture of employee ownership. By empowering those individuals within your organization with the collective feeling of ownership and the “WHY,” the focus can be on your patient care.

## EVOLUTIONS WORKSHOP

**Human Resources:** Our Human Resources workshop focuses on Building Culture in the Practice. This training is two full days of interactive presentations, which are geared toward Doctors and Office Leaders. Attendees learn to select the right candidate, train and continue to develop your employees. This workshop guides and develops attendees to deliver productive interviews, motivate employees in a nurturing environment, and develop their skills to improve the office’s operations. This will increase accountability, along with appreciation, which in return will increase employee retention.

**Optical Enhancement:** Our Optical Enhancement workshop focuses on Enhancing your Optical. This training is two full days of interactive presentations, which will benefit every member of the team, but is especially geared toward Optical Team Members. Attendees learn how to manage the Optical processes, through both Business Care and Patient Care. This aids in increasing revenue, patient retention and satisfaction, reducing costs of goods, and increasing net profit.

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## **CASH FLOW ANALYSIS**

**In order to manage it you must measure it.**

Our Tool gives you the ability to:

- project goals for your office
- measure production
- track accounts receivable
- manage expenses
- calculate the break-even point
- analyze the value of an Associate

To Summarize, we help you to get a more balanced paycheck each and every month.

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## **WHAT WE HAVE EARNED AND WHAT WE HAVE LEARNED**

With more than eight decades of combined experience, our team has earned the respect and confidence from clients who have come to appreciate the insight we deliver. We gain insight from every client we work with and share that knowledge with you. Change is not easy, we recognize that, we have walked many paths and are ready to assist you.

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## **TESTIMONIALS**

**Dr. Joanne Gronquist, Optometrist**  
Santa Barbara, California

*Rick's been in the industry for a very, very long time. He used to work in optometry, so he's seen it all. He knows everything in the field when it comes to vendors, staff and different optometric companies – and he's worked with so many doctors across the nation for so long that I can go to him with any question and he has an answer for it, or he can get an answer for me every easily. He brings the nation's optometry experience to my practice. That's powerful.*

**Dr. Dirk Gray, Optometrist**  
McCook, Nebraska

*Rick is so personable and down to earth, but practical as well. He's helped us with the business side of our entire practice, using his past experience to provide us with good insight and feedback about everything from finance and budgeting to the products we sell. He's taken a vested interest in our future – you can tell he really cares and wants us to succeed. I appreciate both his extensive knowledge and his sincere approach.*

**Dr. Jason Holtom, Optometrist**  
**Red Deer, Alberta**

*Rick's philosophy matches up with our own, and his recommendations are time-tested and proven to produce results. He has so much experience with many different kinds of optometry offices and the problems they all face. Since we started working with him, we've made tremendous changes to our office and office culture. We've really taken off in the last 4 years, nearly doubling our annual sales to be in the top 5% for a single doctor's office. Our increase in gross has all been due to our consulting and ideas from Rick. We rely heavily on him for our marketing, business plan, day-to-day office procedures and communications. The best thing we ever did for our practice was to use Rick's consulting services.*

**Dr. Misty Bauder, Optometrist**  
**Westerville, Ohio**

*I am so thankful that I chose to work with Acquios. As an upcoming new business owner, there have been so many questions and areas of the business that I honestly have had no knowledge about. Kirk and Rick have been incredible. They respond so fast, had the best financial terms of any I had seen, and have already helped me save so much money in the negotiations. The biggest thing that sets them apart for me is how personable and kind they are. So many others I have talked with have been stuffy and intimidating and just made me feel inadequate. I have never felt anything but encouragement and support to my unending questions. It's a small business that truly seems to care about ME and MY practice and not just a financial venture for them. I feel like they are both my advising team, colleagues and friends. It is by far the best business decision I have made as I know it will continue to positively impact every aspect of my business in the future. I can't wait to see where this new venture leads!*

**Dr. Kayla Gaddis, Optometrist**  
**McKinney, Texas**

*Over the past year, I have had the privilege of working with Kirk as I start my own optometric practice. Kirk's mentoring and knowledge of the field have been instrumental in my growth over this first year. He is very professional and maintains a positive attitude in stressful situations. I get asked all the time about the one thing that I would recommend to someone starting their own practice, and the first word out of my mouth is always a good consultant. Kirk has helped me build the team, materials and confidence I needed to make my practice a success!*

**Michael Farley, Practice Administrator**  
**Radford, Virginia**

*We had the great opportunity to work with Kirk Kastens on multiple levels as a cold start practice. He was phenomenal in strategizing our next step and developing a system to make us productive from the start. We received terrific help with budgeting, goal setting, hiring, and patient scheduling as we continued to grow. Kirk's extensive experience in "real world" private practice was a tremendous asset to help us turn a dream and a vision into a reality. We found it easy to communicate and relate our needs, which enabled us to put a plan in motion. We would definitely recommend Acquios to help with your current needs and your future growth. Top notch!*

**Kristy Patterson, Office Manager**  
Panama City, Florida

*I have confidence that the Advisors at Acquios have our best interest in mind when they make recommendations. Because of their immense industry experience, combined with their high moral character, I know I can trust them to help us establish a game plan to deliver extraordinary patient care and grow our business at the same time.*

**Sheila Hay, Office Manager**  
South Jordan, UT

*I feel like Acquios is always willing to listen, teach, offer corrections and ideas when needed, and they make it fun to learn.*

**Dr. Barry Frankel, Optometrist**  
Palm Springs, Florida

*I've worked with Rick [since 2009], and he truly understands our business. He gets it. We're trained as clinicians, but we need help with the business aspect of eye care. Rick is our coach, adviser and advocate. If you're thinking about working with Acquios, sign up. I know you'll be happy with your decision.*

**Dr. Karen LeBlanc, Optometrist**  
South Pittsburg, Tennessee

*Just wanted to tell you thank you. I would be way too nervous to make these big decisions and move forward without your business expertise. I can feel confident growing and moving forward because of you! Thank you. Have a great day!*

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## REFERENCES

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**Dr. Jason Holtom**, Red Deer, Alberta, Canada; Phone number is (403) 352-8846

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