



Acquios  
ADVISORS

*Insight that inspires*

Overview of  
Services

## WHO WE ARE:

The Acquios Advisors Team is proud of our 100+ years of experience working in and assisting with private practices. Prior to becoming Advisors for offices, each of our Advisors worked in private 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 1,100 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:

### Nichole Thompson, Advisor



Nichole graduated from Southeast Community College in 2003 with a degree in Dental Assisting. She then began her journey in the Dental Industry as a Practice Manager for a successful dental practice for many years.

During her time as Practice Manager, Nichole was involved in all aspects of the office. From managing the team, billing, preparing reports to setting goals for the office. She played a key role in developing, coordinating and promoting the office's small business plan in the community and with the Chamber of Commerce.

From 2006 to 2015, Nichole worked as an Instructor at Southeast Community College in the Dental Assisting Program. During that time, she continued with her educational path, earning a Bachelor's Degree in Business from Doane College in 2011. She went on to complete her Masters of Arts in Management, with a leadership emphasis, also from Doane College.

Her education, along with her experience in practice management and instructing, guided her to advising with practices in 2015. Since then, Nichole has worked with professionals in all areas of Practice Management.

When you work with Nichole know that she too has an entrepreneur spirit and she looks forward to being involved in your business. She thrives on relationship building and connecting with people and values every experience.

When not guiding offices to succeed, Nichole enjoys traveling, seeking new adventures, and spending time with her daughter, husband, and dogs.

### Rick Guinotte, CEO and Advisor



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 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 and his wife Debbie have three children. Their oldest is in Graduate school, their second oldest is studying to become an Optometrist, 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. 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 shares his knowledge with Optometrists and their teams.

In his advising role, 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 and members of their team to establish key processes critical to long-term success.

Kirk and his wife Cindy have three children, Olivia 18, Katherine 15, and Jack 10. He enjoys watching their activities and family time. In his spare time, he enjoys golfing, running and being outdoors.

#### 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 and baby boy on the way. 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 your team. 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.

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### 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
  - Hygiene Management/Productivity
  - Vendor/Lab Management
  - Improve Employee Relations/Implement Human Resource Tools
  - Conduct On-Site Visits
  - Practice Valuations
  - Develop and Execute a Marketing Plan
  - Case Acceptance
  - 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
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## **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.

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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 ten 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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## REFERENCES

**Dr. Brandi Deckard**, Bloomington, Indiana; Phone number is (812) 332-2020

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

**Dr. Brenden White**, Sandy, Utah; Phone number is (801) 495-2020

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