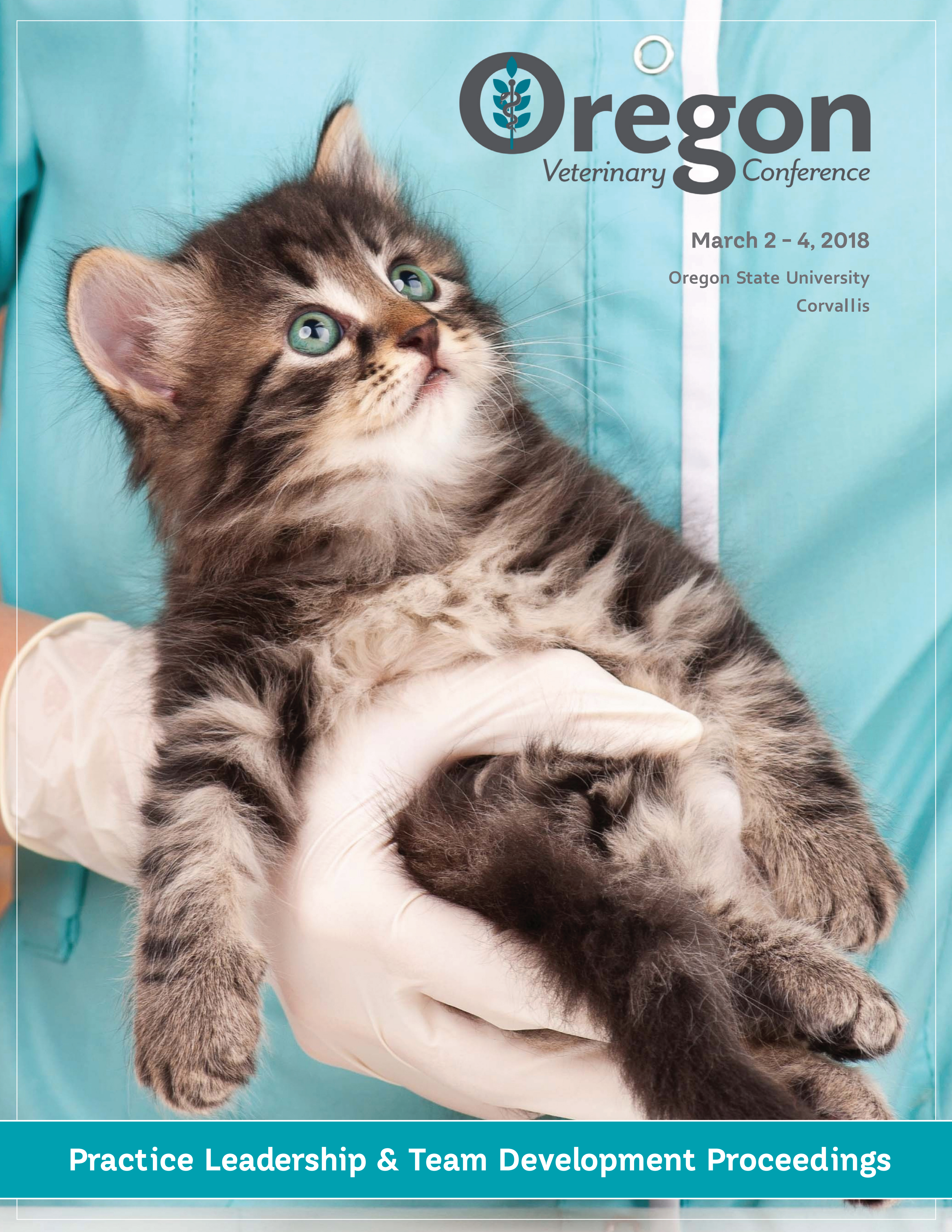
Oregon Veterinary Conference

March 2 - 4, 2018

Oregon State University
Corvallis



Practice Leadership & Team Development Proceedings

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Creating Client Experience Around Technology

Brian C. Conrad, CVPM
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Danielle Burrus is a renowned and respected furturist who lectures around the world on the subject. He discusses soft trends versus hard trends. The easiest way to define them is a hard trend is something that will happen no matter what in the future as opposed to a soft trend that may or may not change over time. One could simple say a hard trend is objective or factual and then compare it to a soft trend which could be described as subjective.

In a recent workshop, he worked with his audience on establishing some hard trends that could be used as predictors for future success. Increased use of Technology overwhelmingly came back from the audience as a hard trend. It would be hard to argue that technology which has yet to be created will continue to evolve the world we live in not to mention play a role in the veterinary industry.

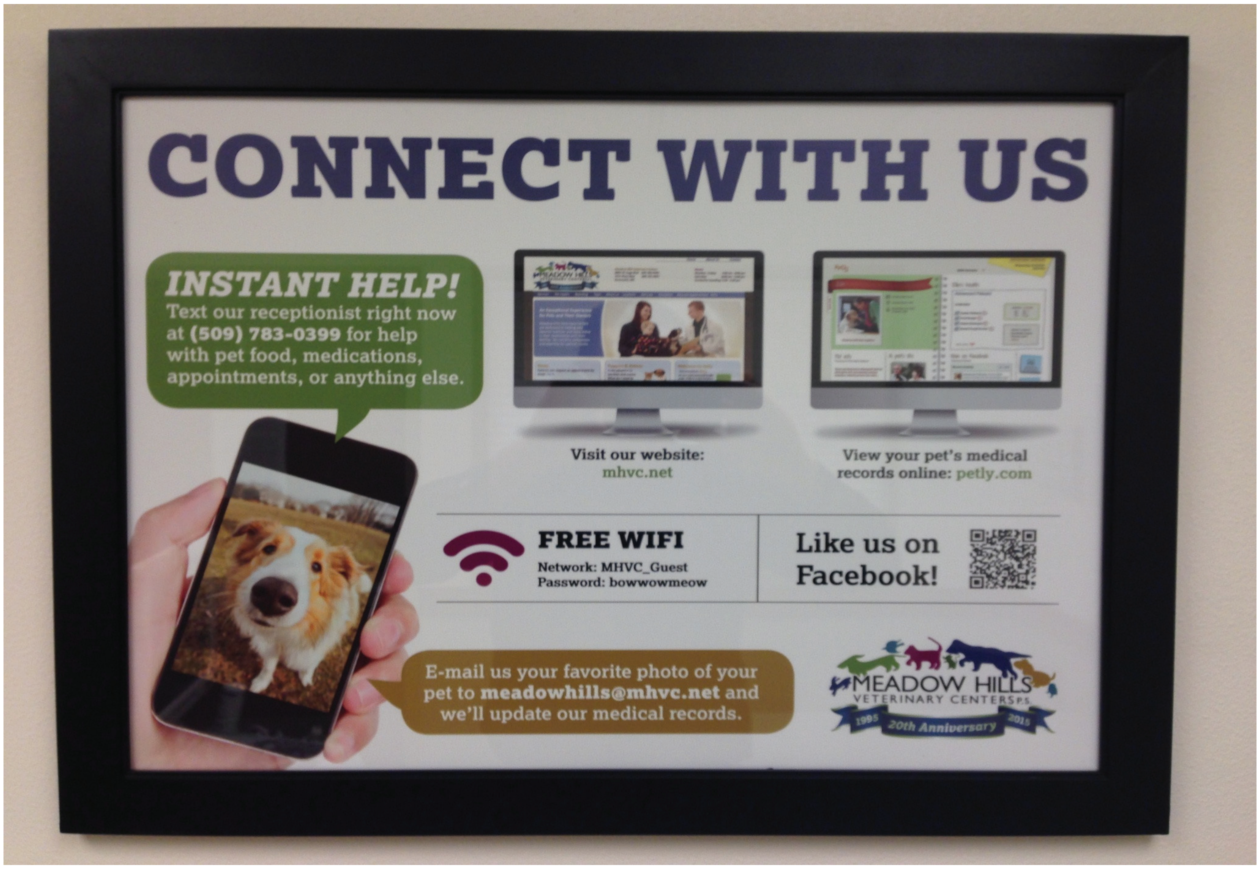
I was recently cleaning out some old files and I came across a *USA Today* newspaper article that I had used for a team meeting with my staff. I vividly recall seeing the article and requiring everyone to read it. From there, we brainstormed on how this article might affect us in the future. It was titled: "It's a Do-It-Yourself World" – The article went into depth on how consumers were wanting to be able to provide services or seek products on their own without having to use help or staff. The ironic part of finding the article was the publication date of April 27, 2004. Nearly 12 years ago and look where we are. We have come along ways and are only going to go further. One can book their own plane ticket, select a seat, check out of a grocery store, deposit a check from a smart phone, order a Big Mac from a kiosk at McDonalds, and/or order just about anything anyone would ever want on the world wide web 24 hours a day.

Each year, Meadow Hills Veterinary Centers, where I am a hospital administrator, we come up with a theme for year. In 2015, that them was "Connect with Us!" While we don't know what lies ahead in the way of technology for interacting with our clients we wanted to start and make sure our clients knew we were going to continue to stay relevant and invest time and resources into seeking out technology that would ultimately encourage a positive experience while having services or products provided for their pets.

We further invested into our software system and implemented a web platform that ultimately the client could set up a portal to monitor their pet's health and medical information and also communicate to our hospitals. From looking up vaccine status, to reviewing blood results and from requesting prescription refills to requesting an appointment. We had given our client the tools to facilitate their pet care 24 hours a day.

We don't know where technology will take us but it is important to our hospital brand and our client relationships for them to see we are going to continue to embrace technology and integrate the technology as it is available to further the client experience.

In 2015 we established these posters that can be found in each exam room, our consultation room, and our reception area.



We grew tired of seeing doctors' offices, dental offices, and other businesses that were adamant that you turn off your phone, tablet, etc. Essentially, they were giving the message of "Disconnect". We wanted the opposite effect. We wanted for our clients to see we were encouraging the behavior. In turn, the technology is going to enhance the client experience.

First off, we established a guest WI-FI. We wanted to make it fun so our password for the internet access is bow-wow-meow. Say that 10 times fast! We also set up a web based platform with our phone system that allows clients to use our main phone number to text our receptionists. If a text comes in, it will show up on all of our front end computers. The idea of texting is certainly not new as many veterinary clinics have smart phones set aside for this very reason. But what we find is we are having to give the client a different phone number for that communication. It then becomes human nature to assume if the clinic is texting from this phone number that I can also "call" the phone number and get information. Many clinics do not answer the smart phone or have a message that plays indicating which number to call. We wanted to alleviate all of this. We encourage our clients to text us while in the exam rooms if they want an update on their pet or time, want us to pull/prepare pet food, want us refill medication, or simply want a chilled beverage.

The next section of the poster refers clients to our website. We take pride in keeping our website up-to-date, user and mobile friendly, and easy to navigate. Our doctor information section far exceeds any other area for number of clicks. We make sure to constantly update pictures and biographies.

The far right section encourages clients to become members of our web based portal system that allows them manage medical records, request appointments, request medications, print vaccine record, and find reliable education on hundreds of pet diseases, diagnostic and treatment options etc.

On the poster we have included a QR code that allows clients the ability to use their phone and be directly taken to our Facebook page. From there, they can like us on Facebook and participate in our frequent posts that include contests and more.

On the bottom of the poster, we have included a clinic e-mail that will go directly to our receptionists. We are encouraging clients to send us a favorite picture of their pet from their phone that they have taken previously. If they don't have one, they can shoot a quick picture and send it to our staff for an immediate update. We promise to update our medical records in addition they become part of our revolving pet photo book that is displayed on many flat screen monitors throughout.

You can see from this one poster, we are giving our clients many options and activities in which they can use their personal technology devices to incorporate into each of our visits. As I indicated above, we know technology is a hard trend. We know it will continue to play a bigger and bigger role. We are off to a great start in getting clients prepared for the future in doing business with us. We even have a sticker placed on every retail item we sell indicating they can text us ahead and we will have the item ready and invoiced waiting for them at our reception desk.

Throughout the lecture, we will take a look at other industries and learn from them in how they are incorporating technology into their client and customer experience. From the airlines to banks and from hotels to gas stations. It is happening all around us. Make sure you clients are connecting with you and make sure you are not giving off signs that indicate you are disconnected.

Management Scenarios Gone Wrong

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Welcome to a very unique CE session where the outcome of the next hour will be decided by you the audience. The participants will be given a list of real-life management scenarios that have gone wrong over the years. We will summarize various categories and then vote to determine which scenarios we will discuss. I will give the pertinent details of the case studies and then have a group discussion about how you the audience would handle a similar situation. We will then give details about what really happened, lessons learned, and action taken to prevent this all from occurring again. You all may select scenarios which involve human resources, marketing, communication, client relations, financials, law and ethics, and/or technology. Obviously human resources comes up often and plays a large role in the amount of time we spend in our day. While I don't know where the session will take us, I have included some scenarios below in regards to hiring and retaining staff as that seems to be a recurring popular theme. I look forward a dynamic and productive session together.

The concerns, questions, and complaints I most often hear at Continuing Education conferences are I can't keep good staff or train them. It of course never seems to be the fault of the owners, managers, or practices. The youth of today just aren't like they were in my day said one practice owner recently in Kansas City at CVC. So where should the fault lie? I am not as concerned as who to blame as opposed to the mind set the practices must take in order to gain some ground on this issue. I hate to burst any practice owners/managers' bubble but for every time I hear "I can't find any good employees" I hear "I wish the practice I worked for was managed better".

Several years ago I too along with our practice owners at Meadow Hills Veterinary Center in Kennewick, WA felt the strain of staff turnover. Each year we set a theme for our management team during our annual strategic planning session. In 2004 the theme was set as the "Year of the Staff". Sure we always wanted to treat the staff well, but were we? It was time to take a mental inventory and evaluate areas for improvement and build on them.

It was at that moment I defined "My Promise." A promise which states "No team member will leave the practice feeling unchallenged, concede to a lack of direction, or have professional growth hindered". A bold statement yet so simple. I realize there are companies out in the world able pay higher hourly wages, afford well rounded benefit packages, and perhaps even work schedules with ideal hours. But can they compete with "My Promise"?

It was a turning point for the company. At the same time a challenge to our management group to not allow this promise to go unfulfilled. The idea of an empty promise leads us to the next factor of ultimate responsibility. The responsibility to say each employee's success or failure is dependent on the systems and communication channels the management team puts in place. Failure by any team member is a direct reflection of the management and leadership style itself. For us to realize our new obligation and find success, the promise had to be interwoven with management undertaking the act of ultimate responsibility.

Let's take a look at an example of ultimate responsibility: A new employee is confused with creating a vaccination schedules for a puppy on their second wellness visit. Our normal reaction tends to be: "We have told her 5 times how to determine the vaccination schedule, I think she is just not bright enough for the job." Ultimate responsibility would have us examining our training methods for the new employee. Asking ourselves, did we spend enough time practicing and role playing? Do we have prepared materials for them to use as references as the new staff learns and becomes confident? Perhaps the training methods are not where the problem is but in our hiring techniques. Maybe we hired somebody trying to fill an immediate void that never belonged in the clinic to begin with. This is where the change has to occur with the management team in taking the responsibility to say we failed the team member, they didn't fail us. The management team must be humble, learn from their mistakes and move on.

The idea of ultimate responsibility must funnel down to your senior staff. It is often time the senior staff witnessing job performances of the younger staff. We recently surveyed all of the staff that was trained in the last 18 months. One question posed was "What was the hardest part of fitting in at the clinic"? One of the popular responses was they felt the staff was quick to offer blame for any mistakes made. Finger pointing simply put. Since completing the survey results we have worked with our staff to create a culture in which now they realize the mistakes made by others are mistakes they need to help offer further training and guidance to. Instead of pointing a finger and gossiping to others, they are taking the challenge on their shoulders to find a solution. Not an easy transition style of thinking.

The staff you have in your hospital is already capable and ready for further challenges and growth. We as owners and managers just simply turn a blind eye consciously and unconsciously. It is not until the clinic enters a crisis situation such as losing key senior staff member that we are reminded. It is scenarios such as this where the management team is forced to promote or ask more of a team member to compensate for the loss. Not surprisingly, the individuals steps up to the plate. The sad part is they had it in them the entire time. We just didn't realize it and take advantage of the talent sooner. I was recently reminded of this lesson a couple of weeks ago. I was in need of some gift certificates that needed to be created for a promotion which was soon concluding. I kept putting off the project because of time constraints. I finally had a team member offer to create the gift certificates on the computer for me. I reluctantly agreed. The next day I arrived in my office to find the certificates were completed in color with our logo and a creative theme for each month of the year (The certificate which was valid for July had a 4th of July theme on it, October had Halloween on it and so on). I was dumbfounded at the thought and creativity that went into the certificates.

We often hear the clichés maximize the staffs strengths and minimize their weaknesses or don't try to fit a square peg in a round hole. As non-original as the quotes are they do hold truth. Part of the promise is to identify each team members tools and talents and having them working positively and in unison for the clinic.

Betsy just celebrated her sixth year anniversary with Meadow Hills. She started in our boarding department and has since cross-trained in every other department of the hospital. While she does a fantastic job no matter where we have her scheduled, it wasn't until recently where we truly found her ultimate strength. She now oversees all of our hospital assistants. From the hiring and training to evaluations and establishing communication lines with other departments, it is a perfect fit for her. One she excels in. We now focus our attention on making sure she is successful in her new endeavor. The management team is there to offer guidance and support and a little bit of cheerleading when needed. At the same time we relinquished some our control in order for her to continue to grow. Not always an easy feat for practice owners and managers but necessary for success when done in a controlled manner. Betsy and others continue to take on more responsibility and with proper road maps and open doors will continue their professional growth for many years to come.

Ah, now the difficult part of the promise. Identifying these talents and strengths and opening the doors for growth and opportunity before it is too late. We start the process by encouraging and soliciting feedback from each member of the staff. It is not uncommon for me to invite an employee into my office and plainly ask "how are you doing" or "How do you feel about your job"? . When time permits I will take an employee on an errand, community event, or just simply for coffee. One on one time which aids me in determining if the staff is staying challenged and enjoying working for the company. A time to talk about personal and professional goals. During these essential meetings I find staff members are unaware about the possibilities the future may hold.

Take Kari, a seven year veteran with us. For six years she worked in Reception and as a part time bookkeeper for us as she began her family. With the kids preparing to enter pre-school she was ready to go back to work full-time and wanted to be further challenged and possible seek work in the field of her bachelor's degree. I took an hour of my day to take her to lunch. During this time we sat and explored options drawing a map with 3-4 areas she could advance with Meadow Hills. Over the last year she has trained in our treatment area becoming a coordinator for our surgeries and dentistry's. I will never forget her satisfied face as she boasted to me she completed the placement of her first IV catheter. She will be attending her first major CE conference at CVC East and we look for her to take on even more responsibility when she returns. A lunch and an hour of time is a small price to pay in order to retain a valued employee.

With the promise goes sincere appreciation and gratitude. Rather than celebrate birthdays we focus on staff anniversaries. A poster is created each month to reflect each employee celebrating an anniversary and notating how long they have been with the company. After 3 years of service the ladies receive a gold star necklace. The gentleman receives a gold star tie tack. At five years a diamond is placed in the center of the star. At ten years the ladies receive diamond earrings. A special way to appreciate our gold star employees and simply say Thank You.

Going back to 2004, I am reminded of a night of celebration and thanks we created for the staff. What was unusual about this evening is our primary focus was to show the staff's families how important each team member was to our hospital and to the clients and pets they serve. The night started off with a tropical themed dinner complete with real Hawaiian leis for each employee. The program presented by the two practice owners reviewed each position with the clinic and the immense responsibility, dedication, and training demanded by each role. The program continued with a video compiled of clients speaking to the staff on what their compassion, professionalism, and expertise means to them and their pets. The night concluded with a slide show of each employee at work played to the song "Simply the Best" by Tina Turner. A group photo was taken that evening. The picture remains framed in my office. While some of the faces have changed, the defining message remains clear of ultimate responsibility and of a simple promise to work hard each day to fulfill. Nothing is more rewarding than to turn out my office light at night, walking out to my car and thinking "I saw someone grow today."

A simple promise. It is time for you as a practice owner or manager to think about creating your promise. A journey to create a culture and environment with challenges growth, and opportunity for your staff. A renewed dedication to ultimate responsibility. At times you will have to be innovative and creative. The satisfaction you will endure while establishing long term professional relationships with your staff will benefit your practice immeasurably.

Trust: Where Did it Go and How Do We Get it Back?

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Client needs and wants have changed as the economy has changed. Thinking we can provide services and products like we did 10 years ago will lead to lost clients, transaction and future business. We need to understand client loyalty is wavering and it is our job to realize the client wants to feel like they are in control of how and where they spend their money. Not always an easy feat. We certainly don’t want clients to feel they are put on the spot and being upsold every time they walk in our doors. We had a financial down turn in 2000-2001. This was relatively short-lived compared to what we say in 2009. With this said, we have seen consumer behavior shift. In 2001, we saw a similar shift but because the effects of the financial hit was so short lived, most returned to their previous buying patterns of services and products. 2009 hit the country much harder and in addition lasted much longer. With that said, we did not see the same trend of customers and clients returning back to their normal buying patterns. The shift has occurred and will remain.

The US consumer sentiment is continuing on the upward swing of how Americans feel about the economy and spending money. But the change would be they are being more guarded on how they spending it, where and when. As I said, they are spending, but they want to feel in control. Businesses that are embracing these changes are seeing positive results. I can say I am no different. Recently I needed to have a couple of gates re-built at my personal residence. Normally I might have just called a company and scheduled it. With me being more diligent about the value I was looking for, I met face to face with the fence company, looked at the materials they were going to use and looked at all of my options. From there, we were able to create a personalized plan for my needs and I gladly spend the $750 feeling in complete control of the project. This is a very simplistic example, but it goes to show how we might evaluate the spending of funds a little differently today.

With the new economy in place, trust is needing to be reestablished as consumers question each of their expenses and who it is they choose to do business with. It also hasn’t helped that we the veterinary industry has made headlines around the country over the last 5 years giving clients reason to believe deceptive or sales techniques are being used for financial gains. In addition, we have made headlines for unethical business or moral practices of animals. Each of these headlines represents less than a tenth of 1% of all our veterinary providers but it gives way for clients to think and rethink if their own veterinarian is practicing in the same way? Why is it they are charging me $X for a prescription and I can go online and purchase apparently the same drug for ½ the price.

This year some 65 billion dollars will be spent on pet care and pet products. We have more threats in way of competition than ever. We are seeing human healthcare and technology companies entering our industry as a branch out. We need to work on creating and monitoring systems that will keep our clients put. While we do this we want to make the client feel in control giving them additional trust in us and all of our team in the care we provide for their pets.

Let’s take a page out of the dental industry and see a few examples of how they demonstrate to their patients that they are in control of their visit. It starts first by a visual queue of handing over the remote to the individual TV installed in the operatory. They tell the patient they can watch any show they want. In continues with handing the patient the controls to the massage chair they are sitting in. Inter-oral cameras are used to show patients what the dentist is seeing and comparing the current pictures with ones that show what their teeth could look like. It’s up to them if they want to hear more information. These are just a few examples of how dentist offices put their patients in control of their visit rather than dictating to the patient how it is going to be.

We know for clients to feel in control with a service provider they must be able to trust the business. Words and phrases such as integrity, character, exceptional talent, drive to personal excellence, internal moral compass, honesty, and leadership round out descriptors for establishing that trust. Cookie cutter approaches to providing care to the patients will leave the client feeling taken advantage of. They will feel in control as they drive their records out of your facility.

Clients will congregate to easy as it further makes them feel in control knowing the business is there to take care of their needs. A recent Harvard Business Review published a study indicating 56% of consumers complained of having to re-explain issues. We see this in our clinics when we make clients repeat histories or call back to check on medications and explain again what they are looking for.

57% complained of having to switch from Web to phone. I agree, we can further put the client in charge when we give them tools to use at their convenience (i.e. online scheduling). But if we are going to offer these tools, we better make sure they work and that we are responding. And lastly 59% of the survey respondents indicated they expended moderate to high level of effort to resolve their issues. If clients are going to feel in charge than they are going to have to have resolution in a timely and effective manner. It is hard to trust a business that isn't willing to find a quick solution to an issue.

As the issues arise, make sure to work on concrete and well communicated plans to the staff to resolve the issues from repeating themselves. You can offer further confidence to the clients by further communicating the changes you and the staff have taken to prevent the issues from arising again.

Euthanasia can be a vulnerable and difficult time for clients. This is an emotional circumstance where the client can feel out of control and not in the driver's seat. Communicate a consistent, empathetic and compassionate system for dealing with the difficult appointment. Consider unique ideas to convey condolences and ways to remember their beloved pet. Personalized cards, flowers, donations to veterinarian schools, clay paws or other memorable symbols of caring. Handling vulnerable and difficult times with clients will further encourage loyalty and trust for visits and business in the future.

As we discussed in beginning, understanding the new needs and wants of our clients is paramount. I recently produced a DVD titled "Listen up! How to profit from client feedback". The video demonstrates the importance to gathering pertinent and real-time data from your clientele to make sure they match up with your offerings. I find many clinics do not take the time to gather this in my opinion, critical information. The clients will tell you sometimes in very colorful language what it is they want or more importantly what it is they aren't getting or how their needs are not being met. "Listen up!"

In 2012, VCA Antech spent time and financial resources on understanding what it is their clients and potential clients wanted for an optimal experience at the veterinary clinic. It is further a testimonial to how important it is that we continue to research what it is the clients want and then give it to them time and time again.

At some point during a visit, clients will have to make a decision on how and if they can financially afford the care needed for their pets. Prepare for these difficult conversations. Offering multiple options for the client will leave them feeling in charge in a time they can feel helpless and out of control. I am not advocating we become banks and allow client's to start up accounts with us but with some proper preparation, we can have several opportunities for the client to use to gain the care they want for their pet. Using guilt tactics or making the client feel like they are being judged will only further push them out of your clinic. The discussion of fees and payment can be one of the harder tasks the staff has to do. Training and role playing are essential in these areas. Clients are much more apt to feeling in control if the person that is helping them is knowledgeable and confident. So often, I see clinics throw a new or untrained person at the front desk or in the exam rooms and they flounder. The client is certainly going to question things when the alleged "expert" cannot answer client questions or are not sure how a procedure will be performed etc. Take the time to work with your staff.

Mistakes will happen from time to time by your most senior doctor down to your freshly hired kennel assistant. It is vital for clients hear apologies but more importantly, options on how the clinic is going to make it “right”. Anytime a client thinks (key word thinks) something has been unjust to them or their pet, they are going to go on the defensive. When any of us are on the defensive, we generally have feeling of fear of the unknown. It is our job as the healthcare team to alleviate that fear and anxiety from the client and put them back in control. This does not mean we let clients walk all over us. Far from it. But it does mean we need to own up to our mistakes and make things right to the best of our abilities.

Placing the client in charge will not happen by accident. Take some time to work with your staff and creating systems and communication styles that give the client a sense of control. Reach out to them by survey and make sure the connection is being made to establish future success for years to come. When the client feels in control, they will have a better sense of trust among those providing the care.

Creating a FUN Work Environment

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This lecture was inspired by the fact I have had multiple practice owners ready to move on from the industry and give up everything for the very little fact that they no longer liked coming to work anymore. In fact, it was so bad at times, that they weren't sleeping, depression was setting in, and they just wanted to find a cave to crawl in to. As we talked through the situations, we found they each had sets of staff that were contributing to the issues and the demise of their careers.

We are not going to spend an hour working on 101 ways to make staff happy or have fun at work. Instead, it is much more focused on how do we create a cohesive team that works well together, helps each other, and at the end of the day realizes that each one of us have the sole job of assuring our clients and their pets are taken care of well. Once we create the structure and accountability for the team, the fun will follow. For others, it will be apparent it is time for them to move on. We cannot have a few individual holding the rest of the doctors and staff hostage and creating a dismal work environment. So where do we start?

One of my only quotes goes a little something like this; "We as managers and owners are often too focused on generating revenue as opposed to focusing on those that allow us to generate the revenue". To have a well oiled cohesive team takes time, training, and appreciation. We will evaluate how to make our team understand we have to do more with less in today's economy. That doesn't mean everyone has to work harder (some of them will). It means we have to find ways to be more efficient. We will gain a better understanding of what our role as the leadership team is in directing our staff for success. Helping guide and mold the staff into seeing new and more effective ways to working in our clinics. Take a moment and learn about a promise I made to my staff several years ago. Because of this promise and new attitude toward the staff, my turnover is low, my efficiency is high, and I am profitable.

The concerns, questions, and complaints I most often hear at Continuing Education conferences are I can't keep good staff or train them. It of course never seems to be the fault of the owners, managers, or practices. The youth of today just aren't like they were in my day said one practice owner recently in Kansas City at CVC. So where should the fault lye? I am not as concerned as who to blame as opposed to the mind set the practices must take in order to gain some ground on this issue. I hate to burst any practice owners/managers bubble but for every time I hear "I can't find any good employees" I hear "I wish the practice I worked for was managed better".

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Let’s take a look at an example of ultimate responsibility: A new employee is confused with creating a vaccination schedules for a puppy on their second wellness visit. Our normal reaction tends to be: “We have told her 5 times how to determine the vaccination schedule, I think she is just not bright enough for the job.” Ultimate responsibility would have us examining our training methods for the new employee. Asking ourselves, did we spend enough time practicing and role playing? Do we have prepared materials for them to use as references as the new staff learns and becomes confident? Perhaps the training methods are not where the problem is but in our hiring techniques. Maybe we hired somebody trying to fill an immediate void that never belonged in the clinic to begin with. This is where the change has to occur with the management team in taking the responsibility to say we failed the team member, they didn’t fail us. The management team must be humble, learn from their mistakes and move on.

The idea of ultimate responsibility must funnel down to your senior staff. It is often time the senior staff witnessing job performances of the younger staff. We recently surveyed all of the staff that was trained in the last 18 months. One question posed was “What was the hardest part of fitting in at the clinic”? One of the popular responses was they felt the staff was quick to offer blame for any mistakes made. Finger pointing simply put. Since completing the survey results we have worked with our staff to create a culture in which now they realize the mistakes made by others are mistakes they need to help offer further training and guidance to. Instead of pointing a finger and gossiping to others, they are taking the challenge on their shoulders to find a solution. Not an easy transition style of thinking.

The staff you have in your hospital is already capable and ready for further challenges and growth. We as owners and managers just simply turn a blind eye consciously and unconsciously. It is not until the clinic enters a crisis situation such as losing key senior staff member that we are reminded. It is scenarios such as this where the management team is forced to promote or ask more of a team member to compensate for the loss. Not surprisingly, the individuals steps up to the plate. The sad part is they had it in them the entire time. We just didn’t realize it and take advantage of the talent sooner. I was recently reminded of this lesson a couple of weeks ago. I was in need of some gift certificates that needed to be created for a promotion which was soon concluding. I kept putting off the project because of time constraints. I finally had a team member offer to create the gift certificates on the computer for me. I reluctantly agreed. The next day I arrived in my office to find the certificates were completed in color with our logo and a creative theme for each month of the year (The certificate which was valid for July had a 4th of July theme on it, October had Halloween on it and so on). I was dumbfounded at the thought and creativity that went into the certificates.

We often hear the clichés maximize the staffs strengths and minimize their weaknesses or don’t try to fit a square peg in a round hole. As non-original as the quotes are they do hold truth. Part of the promise is to identify each team members tools and talents and having them working positively and in unison for the clinic.

Betsy just celebrated her sixth year anniversary with Meadow Hills. She started in our boarding department and has since cross-trained in every other department of the hospital. While she does a fantastic job no matter where we have her scheduled, it wasn’t until recently where we truly found her ultimate strength. She now oversees all of our hospital assistants. From the hiring and training to evaluations and establishing communication lines with other departments, it is a perfect fit for her. One she excels in. We now focus our attention on making sure she is successful in her new endeavor. The management team is there to offer guidance and support and a little bit of cheerleading when needed. At the same time we relinquished some our control in order for her to continue to grow. Not always an easy feat for practice owners and managers but necessary for success when done in a controlled manner. Betsy and others continue to take on more responsibility and with proper road maps and open doors will continue their professional growth for many years to come.

Ah, now the difficult part of the promise. Identifying these talents and strengths and opening the doors for growth and opportunity before it is too late. We start the process by encouraging and soliciting feedback from each member of the staff. It is not uncommon for me to invite an employee into my office and plainly ask "how are you doing" or "How do you feel about your job"? . When time permits I will take an employee on an errand, community event, or just simply for coffee. One on one time which aids me in determining if the staff is staying challenged and enjoying working for the company. A time to talk about personal and professional goals. During these essential meetings I find staff members are unaware about the possibilities the future may hold.

Take Kari a seven year veteran with us. For six years she worked in Reception and as a part time bookkeeper for us as she began her family. With the kids preparing to enter pre-school she was ready to go back to work full-time and wanted to be further challenged and possible seek work in the field of her bachelor's degree. I took an hour of my day to take her to lunch. During this time we sat and explored options drawing a map with 3-4 areas she could advance with Meadow Hills. Over the last year she has trained in our treatment area becoming a coordinator for our surgeries and dentistries. I will never forget her satisfied face as she boasted to me she completed the placement of her first IV catheter. She will be attending her first major CE conference at CVC East and we look for her to take on even more responsibility when she returns. A lunch and an hour of time is a small price to pay in order to retain a valued employee.

With the promise goes sincere appreciation and gratitude. Rather than celebrate birthdays we focus on staff anniversaries. A poster is created each month to reflect each employee celebrating an anniversary and notating how long they have been with the company. After 3 years of service the ladies receive a gold star necklace. The gentleman receives a gold star tie tack. At five years a diamond is placed in the center of the star. At ten years the ladies receive diamond earrings. A special way to appreciate our gold star employees and simply say Thank You.

Going back to 2004, I am reminded of a night of celebration and thanks we created for the staff. What was unusual about this evening is our primary focus was to show the staff's families how important each team member was to our hospital and to the clients and pets they serve. The night started off with a tropical themed dinner complete with real Hawaiian leis for each employee. The program presented by the two practice owners reviewed each position with the clinic and the immense responsibility, dedication, and training demanded by each role. The program continued with a video compiled of clients speaking to the staff on what their compassion, professionalism, and expertise means to them and their pets. The night concluded with a slide show of each employee at work played to the song "Simply the Best" by Tina Turner. A group photo was taken that evening. The picture remains framed in my office. While some of the faces have changed, the defining message remains clear of ultimate responsibility and of a simple promise to work hard each day to fulfill. Nothing is more rewarding than to turn out my office light at night, walking out to my car and thinking "I saw someone grow today."

A simple promise. It is time for you as a practice owner or manager to think about creating your promise. A journey to create a culture and environment with challenges growth, and opportunity for your staff. A renewed dedication to ultimate responsibility. At times you will have to be innovative and creative. The satisfaction you will endure while establishing long term professional relationships with your staff will benefit your practice immeasurably. In turn, it will set up the fun environment you are looking for and wanting.

Pet Care Hacks: “Learning from Seasoned Managers”

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The Veterinary Hospital Managers Association (VHMA) creates a monthly survey termed “Insider’s Insight” that provides up to date data within our industry along with polling owners and manager on a multitude of topics to share with the rest of the industry. Recently, they published information titled *Pet Care Hacks*. In *Pet Care Hacks*, they broke down insight on 3 critical areas: 1. Pet Care 2. Client Care 3. Employee Care. The input from senior managers and practice owners is integral in finding continued success. Innovation and change to stay relevant were themes that glared to the readers. I have taken the data and put it all in real life examples so you may find areas that will be useful for implementation into your own practices.

We all have had some type of success in our practices. Some more than others. But what differentiates ongoing success is for the ability to realize we must continue to be innovative and change to meet the demands, wants, and needs of our clients and future clients. Where we tend to slip up is we see and feel success in our practices and we have a human nature element in all of us to sit back and say “finally, we made it”. I made this mistake at the two practices I manage in Kennewick, Washington. It relates to our client service. We held weekly meetings, we created staff incentives, we solicited client feedback, reviewed other companies out of our industry who we could learn from. The list goes on and on in all of the effort, training and attention we placed on client service.

One day the phone rings and we promptly answer it with a welcoming message. It turns out to be a national company that would like to use Meadow Hills Veterinary Center and 4 other companies in the United States to create a new training film on customer service. Wow, you can only imagine my excitement along with practice owners. We had done it. We have created the most amazing client service experience for our clients and now others want to duplicate it. A sense of excitement but also relief had swept over me. I could now concentrate on other areas of the hospital because it was obvious we had mastered the experience process and we were done in that avenue. Fast forward 24 months after filming. Our client retention is slipping, new client counts are down, and overall client satisfaction is at its worst levels since the company’s inception.

What had happened? We were making the BIG mistake so many companies do. Once you find that magical formula you just sit on it like a sacred cow. A naïve perspective of thinking that once you get there you can sit back and enjoy the fruits of your labor.

We now knew that whether it was our client service, our pharmacy sales, or our marketing programs for dentistry that we had to continue to change and evolve to continue that success we wanted for the company. It was a hard lesson to learn but one we try to reflect on often so that we never forget to change, grow, and mature.

Perform a Self-Evaluation:

How would you describe the culture of your veterinary clinic as it relates to change and innovation?

What do you believe is the most unique or distinct feature about your veterinary clinic?

What concerns do you have about your competition or possible competition that would dilute out your uniqueness?

If you had a magic wand and there were no obstacles in your way, what is one thing you would immediately change about your organization? What would you never change?

If your clinic closed its doors for good tomorrow, what would your community and the industry lose?

The idea of change is relatively simple. The idea if implementation and accountability is at the heart of innovation. Over the course of the next hour we will look at real life examples of innovation and change implementation.

We will look at techniques and systems to get staff excited and on board. The goal of the session is to have concrete objectives to take back your practice and start implementing immediately. But this of course is "subject to change"!

Our client database is the single biggest asset each of us have in our veterinary clients. Many of us don't spend enough time managing and protecting our number one asset. We often get sidetracked with marketing efforts and place a focus on new clients over our existing clientele. It can be argued our current clientele is more important than a new client yet many of our promotions and marketing are geared toward new clients. Are spending time creating that trusted bond with our clients to keep them in our hospital for years to come?

Take a moment to look at your practice management software. Pretend for a moment you are going to enter a new client into the system. What is the client number the software is wanting to auto-assign for them? For me at Meadow Hills Veterinary Center in Kennewick, WA where I manage, the number would be 25690. That is to say 25,690 clients since the inception of my database. Now compare that number to the number of active clients your practice currently has (active client is defined as any client with a posted invoice in the last 18 months). So the difference between the two numbers would be the clients that have walked out of your doors to never return again. Shocking in most cases with numbers often times in the thousands. My clinic unfortunately is no exception. Think of all of the effort, money, and time you have spent in marketing, educating, and attempting to exceed expectations and they are gone.

Please do not rationalize those missing clients with phrases with such as "well they moved out of the area" or "those are the clients that have deceased pets". The worst part is we don't know where they went or why they left. Say it with me again: "Our clients and their pets, they are why we exist."

We have to start to evaluate our client retention rates and also starting to understand the lifetime value of a client. If we start to look at some averages we could take into account a client on average has 2.5 pets with an average of 2 visits per year spending on average $180.00 per visit with a retention rate of 5 years. If we do the math we come out with an average lifetime value of $4,500. If we think about each client with a value of $4,500 than you really are going to want to revisit what happened to all of those missing clients I mentioned above. But it doesn't always work this way. Each client is going to have a different lifetime value. At Meadow Hills, I have a client that has spent in excess of $70,000 in the last 5 years and I have a client that has spent $3.34 in the last 5 years. I am sure you are wondering what they spent $3.34 on. 2 Cans of Hills Pet Nutrition a/d. And now you know. But back to the importance of client values and retention. It is important to know your client retention rate and work with the staff on taking care of your number one asset. It is not uncommon for clinics around the country to lose 20 t0 25% of their clientele per year. Our goal should be closer to 12-15% per years with a client staying active on average for 6-8 years as opposed to 4-5 years.

In order to maintain our client base the client must feel like they can trust the staff and trust the services and products you are providing. I encourage you to sit down with your staff at your next team meeting and discuss the importance of client retention and client trust. It is important your staff doesn't come across as sales men and woman but more of educators and providers for good health. This can be done by focusing on "It's not what you sell it's what you believe" Have you and your staff answer the following questions.

1. What do you promise that only your clinic can promise?
2. What do you deliver that no other clinic in your area can deliver?
3. What do you believe that only you and your staff believe?

I will share some of the responses and focuses we have had over the years at Meadow Hills to get you started:

- ✓ **We promise to see things from a client's viewpoint**
- ✓ **We promise to over-communicate**
- ✓ **We promise to treat your pet like it's our own**
- ✓ **We promise to make it Easy to do business with us**
- ✓ **We promise to own up to our mistakes**

- ✓ **We deliver 1 on 1 care with the client and patient's best interest always at hand**
- ✓ **We deliver incredible value for our services and products**
- ✓ **We deliver flexibility and options for our clients**
- ✓ **We deliver our services and products without judgment**

- ✓ **We believe our staff training is superior to everyone else**
- ✓ **We believe we invest in technology more than anyone**
- ✓ **We believe we dominant when it comes to client service**
- ✓ **We believe there are more than one answer to each problem**
- ✓ **We believe we exist because of our client's and their pets!**

Here are five loyalty tactics to keeping your clients put that you and your staff should be evaluating individually.

1. **Reduce the need for repeat calls by anticipating and dealing with related downstream issues.**

Make sure to work with your staff and train them where we are not having to constantly have our clients talking with multiple people to have their needs and requests taken care of. What is your next step by eliminating steps for your client? How are you going to anticipate their needs to prevent them from having to call in over and over?

2. **Team member to address the emotional side of the client interactions.**

What is it you do now and what changes will you make to assure the client sees you don't just view each visit as a transaction?

3. **Minimize the need for clients to switch service channels.**

What new challenges can you present to your staff to make sure each team member is trained to take care of client requests? Clients do not want to have to be handed off over and over.

4. **Elicit and use feedback from disgruntled or struggling clients**

What new and improved ways are you going to solicit feedback from clients to have a better pulse on how their visit went and an outlet for them to voice frustrations when they arise?

5. **Focus on Problem Solving not Speed**

Clients want their issues resolved and if they know work is being done on their behalf they will not complain. It's when they think they are being rushed or pushed through a conveyor belt that they will start to question if they should be choosing a new clinic. Evaluate your current systems and make sure this isn't happening in your clinic.

Concentrating on protecting your number one asset will reap rewards both financially and emotionally as you keep clients returning year after year. Spend some time with your staff talking about this important issue. Our clients and our pets…they are why we exist. Let's do a better job of keeping them put.

Client needs and wants have changed as the economy has changed. Thinking we can provide services and products like we did 10 years ago will lead to lost clients, transaction and future business. We need to understand client loyalty is wavering and it is our job to realize the client wants to feel like they are in control of how and where they spend their money. Not always an easy feat. We certainly don't want clients to feel they are put on the spot and being upsold every time they walk in our doors.

This year some 50 billion dollars will be spent on pet care and pet products. We have more threats in way of competition than ever. We are seeing human healthcare and technology companies entering our industry as a branch out. We need to work on creating and monitoring systems that will keep our clients put.

Let's take a page out of the dental industry and see a few examples of how they demonstrate to their patients that they are in control of their visit. It starts first by a visual queue of handing over the remote to the individual TV installed in the operatory. They tell the patient they can watch any show they want. In continues with handing the patient the controls to the massage chair they are sitting in. Inter-oral cameras are used to show patients what the dentist is seeing and comparing the current pictures with ones that show what their teeth could look like. It's up to them if they want to hear more information. These are just a few examples of how dentist offices put their patients in control of their visit rather than dictating to the patient how it is going to be.

We know for clients to feel in control with a service provider they must be able to trust the business. Words and phrases such as integrity, character, exceptional talent, drive to personal excellence, internal moral compass, honesty, and leadership round out descriptors for establishing that trust. Cookie cutter approaches to providing care to the patients will leave the client feeling taken advantage of. They will feel in control as they drive their records out of your facility.

Clients will congregate to easy as it further makes them feel in control knowing the business is there to take care of their needs. A recent Harvard Business Review published a study indicating 56% of consumers complained of having to re-explain issues. We see this in our clinics when we make clients repeat histories or call back to check on medications and explain again what they are looking for.

57% complained of having to switch from Web to phone. I agree, we can further put the client in charge when we give them tools to use at their convenience (i.e. online scheduling). But if we are going to offer these tools, we better make sure they work and that we are responding. And lastly 59% of the survey respondents indicated they expended moderate to high level of effort to resolve their issues. If clients are going to feel in charge than they are going to have to have resolution in a timely and effective manner.

As the issues arise, make sure to work on concrete and well communicated plans to the staff to resolve the issues from repeating themselves. You can offer further confidence to the clients by further communicating the changes you and the staff have taken to prevent the issues from arising again.

Euthanasia can be a vulnerable and difficult time for clients. This is an emotional circumstance where the client can feel out of control and not in the driver's seat. Communicate a consistent, empathetic and compassionate system for dealing with the difficult appointment. Consider unique ideas to convey condolences and ways to remember their beloved pet. Personalized cards, flowers, donations to veterinarian schools, clay paws or other memorable symbols of caring. Handling vulnerable and difficult times with clients will further encourage loyalty and trust for visits and business in the future.

As we discussed in beginning, understanding the new needs and wants of our clients is paramount. I recently produced a DVD titled "Listen up! How to profit from client feedback". The video demonstrates the importance to gathering pertinent and real-time data from your clientele to make sure they match up with your offerings.

In 2012, VCA Antech spent time and financial resources on understanding what it is their clients and potential clients wanted for an optimal experience at the veterinary clinic. It is further a testimonial to how important it is that we continue to research what it is the clients want and then give it to them time and time again.

At some point during a visit, clients will have to make a decision on how and if they can financially afford the care needed for their pets. Prepare for these difficult conversations. Offering multiple options for the client will leave them feeling in charge in a time they can feel helpless and out of control. I am not advocating we become banks and allow client's to start up accounts with us but with some proper preparation, we can have several opportunities for the client to use to gain the care they want for their pet.

Placing the client in charge will not happen by accident. Take some time to work with your staff and creating systems and communication styles that give the client a sense of control and trust. Reach out to them by survey and make sure the connection is being made to establish future success for years to come.

Showing Value in the Treatment Area

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It doesn't seem to matter what veterinary hospital I visit, every time I am in the treatment area, I am amazed by the amount of knowledge, love, expertise, and devotion that is dedicated to each of the pets being treated or cared for in the clinic. The issue lies in the fact that all that love, effort, and care is not translated to the client. In other words, we have so much that goes on behind the doors of the exam rooms called "the back" that the client doesn't interpret all of the value. It becomes harder for our value equation for appreciation by the client.

We are living in unique and interesting times. Many of us have a story or two to tell about how the economy has affected them or their businesses back in 2009. Jump ahead to 2018 and the economy is back on its feet but the needs and wants of our clients are changing and we have to be ready for those changes or we will perish of a slow and agonizing business death. Tough economic times will changed the patterns and behaviors of our clients. If we go back to the early 2000's and the bust of the dot com era. We had a hit to the national economy, more so to many that were living in the silicone valley area but the entire country felt it. Buying patterns and behaviors changed temporarily but the country quickly bounced back over 6-18 months. Because of the rapid bounce back, our clients went back to their old purchasing and spending patterns. Go forward 10 years and our country was is in a major recession. One that lasted nearly 5 years. The client of pre 2009 is not the same client as we are seeing today. It more important than ever to understand them and what it is they want or are willing to spend money on.

There is no doubt in my mind that we have pet owners out there that are more than happy to spend their hard earned money on veterinary services and products. It is a matter of us understanding how to create and communicate the value and urgency in our recommendations. I will argue that client loyalty is at an all time low. We all have what I refer to as platinum clients in our veterinary clinics. These clients make up our top 5-10% of our clientele. These are the clients that you could slap in the face 4-5 times and they continue to smile at you and say "I Love You Man"! It is the other sub-set of clients that are sitting on a fence just waiting for your clinic to give them a reason to leave the practice and try somewhere else. And let's not be fooled. The majority of the clients that walk-in our doors are predominately women. When their pet needs are not met, they simply pay the bill and never return. We have to know if we are making the veterinary experience rewarding and valuable. If the value is not there, then they will silently walk out the door and never be seen again. This is a recipe for disaster and we have to create systems in our hospitals to avoid this.

In 2018, we will see between 65-70 billion dollars spend in the veterinary industry. My concern is we have more and more businesses vying for those same dollars than ever before. Others that are offering products and services to your clients are stealing away dollars that you normally would count on. We have human pharmacies selling prescriptions for $4, I was in a national chain grocery store the other day and they have created their own pet insurance, and I saw a commercial the other night for a pet toy line by Martha Stewart. Who ever would have thought we would be competing for pet dollars with Martha Stewart. It is reality and it is only going to get worse. It is more important than ever to hold on to those clients and those pet dollars. You can see why it will be so important to keep tabs on the satisfaction of your client base and keep that brand polished and in line with the needs and wants of your consumer.

It has been said to excel in business you must master one of the following. Operational Excellence, Product Leadership, or Customer Intimacy. Let me give you a better sense of each of the three and I will let you come to your own conclusion of which one you think you veterinary clinic will master.

Operational Excellence are going to be companies that run an extremely tight ship on expenses and profit due to economy of scale. Walmart would be a company that comes to mind. Have you ever seen their vast and intricate "backrooms" where they keep their entire extra set of inventory? I apologize because it is a trick question. There is minimal square footage used as a "back area" or "staging area". Walmart stores most of their excess inventory on semi-truck trailers. The next time you go shopping, pay attention to how many trailers are in back of the store. It is far cheaper storage and it allows transportation of excess goods regionally to all of its other stores. So if a location 45 miles up the road is in need of a product, it becomes very simple and easy. Oh, and the best part, they don't lose out on a sale by the consumer. In addition, it uses almost all of its square footage for you and me to shop in. We might be able to lump some of our corporate veterinary hospital groups under this category but for the rest of us it is going to be hard pressed to compete in this category.

Product Leadership – Product Leadership is extremely easy to explain. It is creating products or services that a customer, client, or consumer never knew they wanted. We all are of guilty of this. How many of us have an I-Phone or I-Pad. How many of us have an I-Phone 4S? How many of us 5 years ago said, "Gee, I wish someone would hurry up and invent the smart phone. Life is near unbearable without it." I say that jokingly of course, but you get the point. Apple is a perfect example of Product Leadership. In fact, we just finished discussing branding. Did you know Apple has the most recognized brand in the world. And that brand it worth some 80 billion dollars. That's right. Just the brand, that doesn't include any other part of the company. Simply that apple with a bite taken out. I bet if I told you a brand could be worth that much money to begin with you all would spend a bit more time working on it. It becomes clear; most of us are not going to be inventing products or services for our clients on a routine basis. But you never know.

So that leaves us with our third and last category of **Customer Intimacy**. This is where the majority of our clinics will fall into. Customer Intimacy is the act of making each and every client that walks through our doors feel like they are the most important person in the world along with their pets. Whether we see 5 appointments in a day or 55, every client is made to feel like they are the only ones that exist. It is those special touches, that personalize the services and products we recommend to make the client feel like this was all done for them. We have to get away from the conveyor belt methods of doing business and running clients through like they are all the same. Our services cannot be seen like a commodity and a one size fits all categories. We have to tailor our visits to make the client and pet feel like everything done from nose to tail is for them and only them. You should be asking, how I can do this without taking an hour per patient? You should also be asking "How can I be profitable by taking so much time?"

For the answer, let's take a look at the Starbucks corporation. They practice Customer Intimacy everyday by allowing their customers to order their coffee any way they want. Can you guess how many versions of coffee there are at Starbucks? Over 60,000 combinations. So to be profitable while using customer intimacy as your mastering technique in business you have to develop efficient systems. Can you imagine trying to teach a new hire how to create over 60,000 different types of coffees. So one thing they do is a specific sequence in ordering. The next time you order your Skinny Grande Mocha you will notice they repeat your order back to you in a different series of order. In fact, they have actually created a brochure on how to correctly order your coffee. It becomes somewhat of a game. By having a system in place for ordering allows Starbucks to offer personalized orders in an efficient and profitable manner. Take a look at the drive thru at the Golden Arches. Again, an act of customer intimacy by getting to personalize your order for you and only you. Yet in order to maintain a profitable and efficient system they created ordering by numbers, electronic screens to verify correct orders, multiple ordering lanes, a pay window and a service window, and automated soda stations. All of this is just for you. You wonder where A&W went wrong.

When creating this customer intimacy it is important that our team is trained and on board. But more importantly, it is our leadership teams number one goal to make sure our systems in place are consistent. There is no sense in offering a service or product if we can't do it time and time again. Let me pick on our front-end staff for a moment. One thing we do is offer to carry out large bags of pet food out to the car for the client. If you re-call client service was a large part of our branding at Meadow Hills. I love every time I hear our staff make the offer to our clients "May I carry that out to your car today". But what will hurt us and get the client thinking we are slipping is if they come in 30 days later for another bag and they don't get the same offer. When a client experiences an "Extra" they are going to expect it each time. And when it is not there, dissatisfaction is going to start to set it. So rule number one. Never implement a system for customer intimacy unless you know your team can perform it over and over consistently.

With that said, let's evaluate 3 client touch points where we can practice our client intimacy:

Treatment/Surgical Plans – More commonly referred to as an estimate, this is our time to shine and explain to the client in a story book fashion what it is we are recommending on doing, how and when it will happen, and why we want to do the specific services and/or products. The treatment plan is tailored to their specific pet again demonstrating customer intimacy. This is a time not to judge, a time to be confident in what the clinic is offering and also a time to describe all of the hard work that will take place for their pet. This is the time to really let the client know all of the work that will be done by the doctor and technicians in the back. Let them experience it first hand and even offer a tour. The more the client realizes what is being done, the more likely they are and will see value in what it is they are paying for. We often fail by simply providing an "estimate" and then we fail more by simply listing a barrage of service list codes that a client has a hard time relating to. Work with your staff on re-creating how you present treatment and surgical plans and you will gain rewards by the simple fact of the client appreciating and accepting what it is we are recommending.

Admit Appointment – An admit appointment is a extremely beneficial tool to use in communicating to the client about their scheduled diagnostics or treatments/surgical procedures. In 10 minutes, we can further create value while at the same time assuring our veterinary team is on the same page as the client. To get started, set up 10-15 minute appointments with each client that is have a diagnostic or procedure. We usually call this our drop off time and can often be pure chaos as you have 3-5 clients dropping pets off all together. Instead, plan the morning out a bit. Take the individual time with each of your clients and have the technician review the day's schedule. Have them review the procedures and expectations. Offer a tour so the client can see firsthand what is going to take place. This is the time to assure we have current phone numbers and also a time to discuss elective or optional additional services such as a microchip etc. This one on one time is invaluable in demonstrating the work that will be done and assuring the client is getting everything they are requesting. There is nothing worse than doing a lump removal of small growths only to find we didn't remove the most important one to the client. It is during this admit appointment we can assure we are all on the same page. It is also here that we will indicate we wish to schedule a discharge appointment.

Discharge Appointment – Much like the admit appointment, we are wishing to control the end of day chaos, demonstrate value in what was done, and educate the client on all of the home care needs of their pet going forward. All of the work that was done behind closed doors can now be communicated to the client for them to gain a better understanding of what it is they are paying for but more importantly, giving them a greater understanding of the effort and expertise that was used on their pet today. This is a time to review the procedure and findings, review expectations, and review home care instructions to include medications. This appointment typically lasts 10-15 minutes. The majority of the appointment should be done without the patient. Once the patient is brought into the room, the client will have other focuses rather than on you as the presenter of information. In addition to review everything we have talked about today verbally, we should also have this in a written form. This will be useful for the client to review again at home. We forget how much information we are giving to the client at once and sometimes can be a bit overwhelming. I would further encourage you to charge the client for the invoice after the discharge appointment has taken place. We find that when the client gains an understanding of the value of what took place, the bill becomes less significant than it might have been without. Taking time to spend with your clients after during the discharge will be the cherry on top and leave the client feeling satisfied and wanting to return in the future.

The new and revised treatment/surgical presentation, the admit appointments and the discharge appointments are all 3 useful tools in further defining, communicating and demonstrating all of the incredible work that goes on behind the scenes. Consider making some modifications in your own hospital to further show this value to your clients. I guarantee you won't be disappointed and neither will the clients.

Getting More Pets the Care They Deserve

Amanda L. Donnelly, DVM, MBA

The human-pet bond is stronger than ever and pet spending continues to go up every year. And yet veterinary visits have declined in the past 10 years. In part, this is because people have many choices for pet care and have become more cautious consumers. Unfortunately, another major factor is that pet owners still don't fully understand the value of regular veterinary visits.

Veterinary practices that maximize the opportunity during every client interaction to create an exceptional experience will help pets get the care they deserve. Team members should learn how to be seen as a trusted advisor in today's marketplace and build client loyalty before, during and after visits. Trusted advisors focus on client engagement and client education to improve client retention and increase word of mouth referrals. Moreover, they use specific communication skills and implement actions that create lasting impressions with pet owners, increase client visits, and improve compliance with wellness and treatment plan recommendations.

Client Engagement: Build Relationships And Connect With Clients
In their book *Human Sigma*, two Principals of Gallup, Joe Fleming and Jim Asplund define customer engagement as making an emotional connection with people such that they become emotionally satisfied customers. Their research shows that customers who are emotionally vs. rationally satisfied will spend more with a business, be loyal customers and refer more people to the business. This concept applies in veterinary medicine as in other businesses. Client engagement is about making authentic connections with pet owners. Clients routinely develop strong relationships with veterinarians and team members. Clients may say to a friend or co-worker "I wouldn't dream of going anyplace else with my little Sophie." However, due to a variety of factors within the marketplace (such as Internet pharmacies, low-cost providers, effects of the recession and increased ease of gathering information on the Internet just to name a few) clients are not as easily bonded to their veterinary hospital as they used to be 10 years ago. Concerted efforts are necessary by all team members to enhance levels of client engagement.

Creating Positive First Impressions
Studies have shown people form first impressions in 7 seconds. This isn't much time to impress clients but the good news is there are specific actions you can take to create positive lasting impressions with pet owners. Clients quickly form first impressions when they walk into the reception area.

Here are 4 actions you can take to create a positive impression and be seen as likable:

- Make eye contact. Don't just glance up at the client and then look back at your computer screen. Instead hold the eye contact until you complete the next 2 steps.
- Smile and convey a positive attitude that says "I'm glad you're here"
- Tailor your greeting to the client. You can say "Hi Mrs. Jones, how are you and Sophie doing today?" This greeting helps to determine how the client is feeling and shows interest. If you don't know who the client is, you can say "Hello. Are you Mrs. Jones with Sophie?" Don't worry if you don't correctly identify the owner. Just move to a positive statement about their pet or how you can help them.
- Have an open body posture and lean forward. Your body language needs to match your verbal welcome. If possible stand to greet clients or even come from behind the desk. This shows you're happy to see the client and often makes it easier to see and greet their pet.

Using Client And Pet Names
A very simple, yet often overlooked way to make service more personalized is to use the name of the client and the name of the pet when speaking with pet owners. People like to hear their name. Using someone's name shows respect but it also conveys that you know who they are-they aren't just a number in your day.

Be sure to use the client's last name and an appropriate title unless you know the client well. For example, you would say "Hi Mr. Taylor, we're ready for Jake now" or "Mrs. Smith; here is your medication for Josie." If the client says, "Please call me Sally", then you can use their given name. Try to use the client's name at least 2-3 times over the time of your interactions. Two very appropriate times to use a client's name are when greeting a client and when saying goodbye.

People also love to hear their pet's name rather than hearing "your pet, he or she". Using the pet's name helps you avoid having to worry as much about getting the pet's gender correct because you'll be saying Scooter rather than "he" or "she". Moreover, referring to the pet by name tends to result in you saying the correct gender because it wouldn't make any sense to talk about "Sophie" and then say "how is he doing?" Remember that the use of client and pet names applies to the phone also. Ask callers their name and their pet's name so you can then use the names throughout the conversation.

Engage Clients with Compliments
Everyone likes to receive compliments so look for opportunities to say something nice to clients. Always praise clients about how well they take care of their pet because this will reinforce your position on patient advocacy and show you care about keeping pets healthy and happy. For example, you may be able to comment on what a great job a client did with getting their pet to lose weight. Or you could compliment clients for being consistent with heartworm and flea control products.

Don't forget to compliment pets since owners love to hear team members show interest in their pets. You may be able to comment on how attractive the pet is, tell the owner you like their collar, or compliment the pet for being so cooperative and friendly. Don't limit your compliments to praise or comments about the pet. If you like something about the client let them know. You may compliment people about their clothes, jewelry, hairstyle, community involvement, quality of their work, or their sense of humor.

Converting Phone Calls To Appointments: What To Say And Not Say
Developing outstanding phone skills is extremely important since it is often the first impression clients have regarding the practice. Clients begin to make assessments about a business based on their phone interactions with staff and the conversation can easily influence decisions to book an appointment.

Communicating effectively with clients on the phone presents challenges since neither person on the phone can rely on visual cues to enhance communication efforts. In many instances, it's less about what you say and more about how you say it. Here are examples of phone skills and best practices for the phone that will create positive impressions:

- Always answer the phone by the 3rd ring. When the phone rings longer than 3 rings, clients become irritated and feel the practice does not value the importance of providing exceptional client service
- Don't quickly rattle off a greeting the client can' easily understand. Identify the name of the practice, your name and ask how you can help the client. This greeting should be articulated clearly and concisely.
- Use a friendly, relaxed and upbeat tone of voice when answering and speaking on the phone. The person on the other end of the line should immediately feel like they are talking to someone who is warm and interested in helping them. Verbalize the same enthusiasm to clients you don't know as you do with pet owners who are your favorite clients.

Responding To "Phone Shoppers"
It's a rare client service representative that gets excited about handling phone shopper calls. So, begin by thinking of these as "Potential Client" calls instead of "Phone Shopper" calls which carries a negative connotation. Bear in mind that many pet owners are cost conscious in light of the slow economy and it may be your existing clients who are calling about fees. Use the following communication skills increase the number of calls to booked appointments

Engage Clients Before Quoting Fees
Start the conversation with a positive comment such as *"I'd be happy to help you. Let me get some more information so I can be sure to give you accurate information."* Next, ask the caller's name and their pet's name so you can deliver personalized service. Then ask *"Have we seen your pet (dog, cat) before?"* to determine if the caller is an existing client or has never been in before.

After asking the caller for their name, their pet's name and whether they are a client of the practice, strive to quickly engage the client before just quoting fees. There are two basic ways to engage telephone callers; by asking engaging questions and by making engaging comments. Both work very well but remember they must be authentic and sincere.
Engaging questions to ask a caller about their pet or their situation include questions such as:

- *"How did you find out about our practice?"*
- *"Has it been awhile since you had a puppy?"*
- *"Do you have her medical records?"*

Engaging comments are authentic compliments or friendly comments that demonstrate warmth and enthusiasm such as:

- *"Oh, I love Papillons, they are so cute"*
- *"What a pretty name."*
- *"Yorkie puppies are so adorable. I bet you're having fun with her."*

Communicate The Value Of Services
Remember to always, explain the value of specific services before quoting fees. The goal is to engage clients and convey the value of services without having callers feel like you're never going to get to the point and tell them the fees. Rather than only giving the caller fees for the service they asked about or rattling off all possible fees, begin by asking a few questions to best determine what services are necessary for the callers pet. Then give a few details and describe the benefits of services. For example if a potential client calls to ask about the cost to bring in their new puppy for vaccinations, you would ask the age of the puppy and inquire about the medical history. Once you know this information you would say:

"Mrs. Jones, Gidget is now due for her second set of puppy vaccines. When she comes in for her vaccinations, one of our doctors will complete a comprehensive physical exam to evaluate her health and discuss any concerns you may have. Her vaccines include protection for distemper and parvo which are viral diseases that can be life threatening as well as protection against 2 upper respiratory diseases. In addition, our doctors recommend testing a stool sample to check her for any intestinal parasites and we routinely deworm all puppies for worms that can be transmitted to people. The cost for these services is $00.00. It's important to get Gidget started on heartworm and flea prevention as well. For puppies, we provide complimentary doses on their first visit which is a value of $00.00"

Handling Cost Inquiries For Sick Pets
Don't make the mistake of simply telling pet owners, *"We can't diagnose over the phone. We have to see your pet and that will cost $45."* What the caller really wants is meaningful information and empathy. Ask questions about the pet and their symptoms which demonstrate your concern for the pet. Then follow up with empathy phrases.

Your end of the dialogue might sound something like this: *"Mrs. Humphrey, how long has Chloe been vomiting and how has her appetite been this week? I am so sorry to hear she isn't feeling well and like you, I know I'd be concerned, too. You know it's impossible to say for certain what's causing her illness. I wish I could tell you something over the phone but really the best option is to have Dr. Taylor check her out. After examining Chloe, she can tell you what she thinks is going on with her and we can certainly let you know any costs involved before proceeding with tests or treatment. Our examination and consultation fee is $45."*

At this point, pause to let Mrs. Humphrey speak. If she doesn't indicate a desire to schedule an appointment, further express that she will have peace of mind once she and Chloe see Dr. Taylor and let her know what time she can bring Chloe in or drop her off to be seen.

Give Clients Accurate Information With Confidence
When veterinary team members are well trained to appropriately educate pet owners they can help attract new clients to the practice and build loyalty with existing clients. Therefore, it's important to always convey accurate information to clients. When clients hear different recommendations from team members they can become confused and trust starts to break down. Take for example educating new puppy owners about heartworm preventive medication. The American Heartworm Society has established guidelines stating that puppies should be started on preventives by 8 weeks of age. Yet in my mystery shopper calls, I've found that 20% of client service representatives recommend an older age. Consider how a client might feel if you give them erroneous information and they later find out they were misinformed. To be a trusted advisor for pet owners requires specific training to become knowledgeable about many topics including the hospital's appointment and scheduling protocols, recommended preventative care guidelines for pets, medication refill policies, answers to common medical questions, and other common healthcare topics such as nutrition, microchipping and dentistry.

Always Ask For The Appointment
Asking to schedule an appointment increases the likelihood of actually booking an appointment. After communicating the value of services and quoting fees, always ask the caller to schedule an appointment and offer specific times. This strategy conveys to the potential client an interest in having them come in.

End Calls With A Positive Statement
Close by letting the caller know the practice is very interested in seeing their pet. If it is an existing client, use phrases such as *"We'd love to see Chloe again. Please call me back when you are ready to schedule an appointment."* If it is a potential new client that doesn't schedule an appointment, leave them with a reason to call back to schedule an appointment at your hospital. This closing statement is essentially a call to action and should convey pride in your hospital and services. You could say *"We welcome the opportunity to care for Chloe and would love to have you as a new client. We're proud of the quality of medical care and service we offer. And I know you will like Dr. Smith-she is so compassionate and knowledgeable."*

Communication Skills That Enhance Client Loyalty And Compliance
Research in both human medicine and veterinary medicine has shown communication is a core clinical skill and better communication by doctors leads to better relationships and patient outcomes. Enhanced communication by the veterinary healthcare team builds client loyalty and at the same time leads to better patient outcomes for pets due to improved dialogue and decision-making about what is best for the pet. The following communication skills can be used by any team member to build rapport with clients and help increase compliance with treatment recommendations.

Ask Questions To Connect With Clients
Look for opportunities to gather more information, gain insight, and create stronger connections with pet owners by asking questions. It often only takes a few minutes longer and this communication skill helps to develop a more meaningful client relationship which leads to greater client loyalty.

One of the best ways to engage clients is to ask open-ended questions. Open-ended questions can demonstrate genuine interest in the client and their pet. Examples of open-ended questions include:

- "What do you have planned for the holidays?"
- "You seem uneasy Mrs. Taylor. Can you tell me more about your concerns?"
- "I think Welsh Corgis are so adorable. How did you decide to get one?"
- "Tell my how your daughter is doing in soccer."

- "What toys does Sadie like to play with?"

Non-Verbal Communication
Non-verbal communication is just as important if not more powerful then verbal communication. Regardless of what we say, our body language also tells a story. It's imperative that team members be mindful of the message received by clients as a result of non-verbal communication. For example, folded arms, a frustrated sigh, or frowning may indicate impatience and frustration with the client or pet. On the other hand, smiling, nodding of the head, and leaning in toward the client demonstrate interest and patience when the client is talking.

Eye-contact is one of the most significant non-verbal communications. Communications can seem impersonal and clients may perceive you're not very interested if you don't make eye-contact with them. At a minimum, be sure to establish eye-contact with clients when they arrive at the practice, when asking them to follow you to exam rooms, when greeting them in exam rooms, and when saying good-bye.

Try to sit down next to clients during important discussions. This helps make clients feel like they're a partner in the care of their pets and facilitates easier dialogue without distractions. When you stand while clients sit, clients may feel intimidated and be less likely to ask questions. In addition, it is easier for team members to focus on the client when sitting down to talk.

In addition to your own non-verbal communication, observe the non-verbal communication of clients which will give you clues about their feelings and what actions you may need to take to improve communication. For example, glancing at a cell-phone or watch, pacing, folded-arms, hands on the hip, standing instead of sitting in the exam room, standing near the door, and frowning can all indicate the client is in a hurry or unhappy about the wait time. Clients who are afraid or uncomfortable for some reason may display nervous behaviors such as clutching their pet, looking down, reluctance to talk, or fidgeting in their chair. Once you become more observant of client's non-verbal communication, you can take action to respond to their body language.

Practice Reflective Listening
Some people are naturally good listeners and some people have considerable difficulty with this communication skill. If you know you tend to always think about your response while someone is talking or you tend to interrupt others when they talk, you may need to practice developing better listening skills. Listening to clients is important for two primary reasons. First, it is often critical to ensuring you have gathered all the relevant medical history and information about the pet and client. In addition, attentive listening demonstrates interest and compassion towards the client.

Reflective listening helps to make sure that we have listened to clients, that we are processing the correct information and that we are cognizant of what pet owners are feeling and thinking. Examples of reflective listening statements include:

- "I'm hearing that you think maybe Scooter's quality of life isn't good, is that correct?"
- "I understand you have some limits on what you can spend today."
- "If I am hearing you correctly, it sounds like you're unsure which treatment option is best for Sophie?"

Reflective listening statements invite clients to affirm that you have understood them correctly. If you have made erroneous assumptions, clients have the opportunity to clarify their thoughts and feelings. In addition, reflective listening invites client to give you more information. This can be critical particularly when you engage in dialogue about serious medical conditions and need to ascertain the level of understanding by the pet owner and/or their willingness to care for the pet.

Empathy Statements
Veterinary teams generally do an excellent job of showing compassion to grieving clients and are routinely

praised for being kind, yet many team members miss out on opportunities every day to convey empathy to pet owners. It isn't that doctors and staff don't want to let clients know they are empathetic; rather it is that teams often don't know what to say and when to use empathy statements.

Empathy statements are used to convey to clients that you understand their perspective and feelings. They are an acknowledgement of the client's emotions or their position. Here are some examples of empathy statements:

- "I can appreciate that this is a difficult time for you."
- "I understand you weren't expecting these expenses for Hannah's care today."
- "That must have been very upsetting to see Chloe have a seizure. I know I would be scared too."

Empathy statements don't have to be confined to discussions about the pet. You can express empathy about anything a client may tell you including family illness, job situations, personal problems, minor frustrations, etc. People appreciate affirmations and concern about what they are going through.

Handling Angry Clients

In veterinary practices, the team interacts with pet owners who experience many emotions. One of the most difficult emotions for employees to deal with is anger. While no one likes to be confronted by a livid client, team members who are trained to respond with compassion will find these encounters less stressful and be better able to reach a positive outcome. Here are steps all team members can use when responding to a disgruntled client.

Stay calm

Sometimes clients take their anger out on team members even though no one in the practice did anything wrong. It's human nature to feel unjustly accused or insulted and to respond with argumentative or defensive comments. Unfortunately, this doesn't help the situation. Avoid escalating tensions by responding to angry clients with a calm demeanor. Focus on taking deep breaths and controlling your own emotions.

Seek to Understand

Allow clients to vent their frustrations or to thoroughly explain what they are angry about. If you interrupt them too quickly, you may exacerbate their anger. The goal is to clearly determine the underlying reason for the client's anger. Are any of their complaints legitimate? Are they under stress? Are they afraid their pet may die? Do they seek attention or reassurance? When you correctly identify the motivators for behavior you'll be more likely to respond appropriately. Ask open-ended questions to discover all the reasons why the client is upset.

Apologize when appropriate

Be sure to apologize when mistakes are made. Quick apologies usually serve to defuse anger. An apology should be offered if someone on the team failed to provide excellent service or deliver on their promise. Examples of times when an apology is warranted include forgetting to send a toy or leash home with the pet, failing to prepare a prescription on time and not making return calls as promised.

There are many times when it is appropriate to say "I'm sorry" but the expression is used to convey sympathy. For example, you may say "I'm sorry for the communication breakdown." In these instances, the practice team did not/may not have done anything wrong but you want to let the client know you're sorry they have been inconvenienced.

Seek to connect

People want to be heard. Clients appreciate team members who listen and express empathy. Listening is an active process. Body posture and facial expressions are important if you want to convey interest and a genuine desire to help. Lean forward slightly, nod, and maintain eye contact. Convey empathy with statements such as, "I know this was an unexpected illness and how much Sophie means to you." Always attempt to validate clients' emotions. You can do this by saying, "I understand that you are angry" or "I realize this is a difficult time for you".

Problem-solve
When people are unhappy about service, they want someone to take action to resolve the problem. Clients don't want to hear excuses or details about your policies. Even if you're unsure how you can solve a client's problem, start by responding with a phrase such as, "Let me see what I can do," which confirms a desire to help. Even if you cannot give all clients what they want, thank them for their feedback and offer reassurance that you will do your best to provide assistance. For example, if a client is upset that the doctor has not called them back, you may be able to offer an explanation and assure them that you will do everything you can to facilitate the return phone call.

If the client's anger escalates, even with your best efforts to help them, confront them politely about their behavior. It's appropriate to say, "Mr. Smith, I'd like to help you but the level of your anger is making it difficult for us to work together to resolve this issue." You can also ask the client what they want or what will make them happy. You can say, "Mrs. Clark, we value you as a client. What can I do to help you?"

Remember that everyone has a bad day occasionally and you may just be in the line of fire on that day. And people love their pets so they may be under considerable stress in a veterinary hospital. Teams that can defuse clients' anger help raise the level of service and can even help pets get the care they deserve.

Team Training To Improve Compliance
Veterinary teams trained to focus on client engagement and education can successfully build trust and rapport with clients which helps to bond them to the practice. Through the use of specific communication skills and strategies, these teams can increase patient visits and compliance with treatment recommendations. To begin the training process, start by making sure everyone on the team understands the benefits of enhancing their client communication skills.

Relevant Statistics
It can be helpful to share compliance data with the team so they understand the need to communicate better with pet owners about the value of veterinary services. The 2011 Bayer Veterinary Care Usage Study showed a number of factors responsible for declining patient visits including that pet owners don't fully understand the need for routine examinations. In 2014, there was an update to the 2011 study which showed that pet owners were willing to accept longer intervals between veterinary visits and they had an increase in reliance on the Internet to find information about their pets' medical care. In addition, there was an 11% increase in clients saying the cost of care was higher than they expected.

Define Team Member Roles Before, During and After Appointments
The best way to improve client compliance with treatment recommendations is to work as a team. If you're organized and work as a team, clients are more likely to receive consistent client education messages and to understand the value of your services which will result in greater compliance.

The first step to developing an organized, team approach is to make sure everyone knows how to fulfill their specific role as a trusted advisor to pet owners. For pets to get the care they deserve, everyone on the veterinary healthcare team needs to build trust with clients by providing accurate and thorough information about pets' medical care. They also need to build trust by focusing on client engagement. Remember trusted advisors focus on client engagement and client education *before* making recommendations.

Reassess Your Protocols
Think about your hospital protocols and staff roles for routine wellness visits. Who makes recommendations to clients about their pets' needs? Do staff members quickly state what services are due or do they first ask questions about how the pet is doing? Are team members trained to talk about the benefits of services and products that are being recommended? Is your team focused on increasing the number of services performed each month or on patient advocacy? As you reflect on your communication protocols consider what messages you are conveying to

clients. Most practice teams feel like they're focused on the welfare of pets by making appropriate recommendations but what do clients think?

Train Teams to Enhance Client Engagement
Client engagement is about making authentic connections with pet owners. One of the best ways to connect emotionally with clients is to recognize their unique needs while endeavoring to exceed their expectations. For example, a new puppy owner may need reassurance and praise for their socialization efforts as well as thorough information about preventative healthcare. Pet owners with sick pets often need someone to explain complex medical conditions in a manner that they can understand, payment plan options, realistic information regarding patient outcomes, someone to validate their emotions and someone to convey empathy. Busy doctors and staff members sometimes forget to see the client's perspective when communicating with clients. Don't make this mistake. Instead, remember to focus on what clients may be feeling and what they need from the healthcare team as well as what their pet needs. When you do this, clients will understand and remember your team as their "trusted advisors".

Train Teams to Enhance Client Education
Clients are more skeptical today and have many choices for pet healthcare. They may think someone is trying to "sell" services if team members immediately provide recommendations for their pet before even asking questions, taking a thorough history or performing a physical exam. Clients may feel like their pet is just a number to the practice and receives the same recommendations as every other pet that walks through the door. Here are some skills and strategies to use to better educate pet owners and inform them about the value and benefits of services. These skills help build trust.

- Don't assume clients are knowledgeable about basic services. Ask if they have questions about heartworm disease and let them know which common parasites are being looked for when they bring in a stool sample.
- Ask open-ended questions about pets and engage clients in a dialogue before immediately launching into what services you recommend. Ask questions such as "What problems are you seeing with Sophie?" or "Tell me what concerns you have today about Max?"
- When team members do make recommendations for wellness care prior to the veterinarian doing a physical exam and consultation, be sure to let client's know the doctor will do a full evaluation of their pet's health and answer any questions they may have.
- Make sure all aspects of the physical exam and procedures are thoroughly explained. While conversing with the client is desirable and necessary, don't make the mistake of having the pet owner completely miss out on the value of the exam because they didn't even realize the pet was being examined. The client should be informed of normal and abnormal findings and the reason for each part of the exam.
- Even if you take the pet to the treatment room for procedures, take the opportunity to show clients some of the equipment used. For example, show clients the snap test when it is completed and the tonopen or Doppler. Use visual aids or models to reinforce verbal messages when possible. For example, use the body conditioning score chart to let clients see why you want to talk about weight loss for their pet. If you don't have client education brochures with pictures or anatomical drawings, look into obtaining these visual aids.
- Give clients sufficient information. For example, after recommending wellness care such as diagnostic testing, give the client more detailed information about what tests are included and what they will reveal about the pet's health.
- Don't just make recommendations-focus on need recognition and the value of the services. Tell the client why the pet needs the tests. Use phrases such as "the senior testing will determine if Benji is healthy or if he has any early indications of illness." And finally, tell the client the value of the services by using phrases such as "We want to catch any abnormalities early so that we can help Benji live a long life"
- To effectively communicate the value of a veterinary service or product to clients, make sure everyone on

the team understands and agrees with the value of the hospital's services and products. When gaps in knowledge are identified or employees demonstrate discomfort associated with certain client interactions, focus training in these areas.

Talk With Confidence About Money
Often, staff members receive the brunt of client complaints about fees since they collect deposits, receive payments and may present treatment plans. Untrained employees may not know what to say when faced with an angry client and suffer in silence. To avoid this situation, train team members so they're comfortable talking about money. Empathetic employees who can confidently communicate the value of services and present payment options help build trust with pet owners.

Make sure team members don't think they need to apologize for the cost of services but instead should remain committed to providing the best care possible to pets and focus on communicating the value of this care to pet owners. Inevitably pet owners express concern or complaints about fees when presented with treatment plan recommendations. When this occurs, convey empathy, identify possible other underlying causes for an owner's reluctance to agree to services and focus on how to overcome objections.

The following schematic outlines the process of effectively communicating with clients to build client loyalty and improve compliance. Following the diagram are suggested actions for staff training for each part of the cycle.

Making It Stick: Setting Service Standards To Differentiate Your Practice
Setting standards helps ensure consistency in the execution of service to your clients. When standards exist, there is a greater chance that pet owners will experience the same service and client education from all team members even on different visits to the practice. Client service standards can also differentiate your business from other veterinary practices in your area especially if the level of service provided is superior to that offered by competitors.

Creating Service Standards
The first step to creating standards is for the leadership team to decide what level of service to provide to clients. You may think that this seems like an unnecessary step. Doesn't everyone want to provide the highest quality service possible? Maybe. Maybe not. The fact remains that different practices have different business models and strategies which may guide the quality of service that is offered. For example, a high volume, low-cost clinic in a middle-income community may purposely choose to offer a different level of service than a 24-hour, full-service hospital in an upper-income major metropolitan area.

Be sure to include the team in the process of creating standards as this will help to achieve team buy-in for the standards. This discussion time also affords the team an opportunity to give feedback about whether they feel the standards are reasonable and attainable.

Implementing Service Standards
When implementing service standards, it is helpful to develop standards for specific client interactions as well as general standards for the entire team. The following are examples of client service standards:

Service standards for all personnel

- Arrive for your shift 5 minutes before you are scheduled to ensure that you have time to clock in and be "on the floor" ready to work at the beginning of your shift.
- Always make eye contact with clients when you say hello and when you say goodbye. Look at their eye color to make sure you have made a connection.
- Make at least one positive statement or compliment about the pet during every visit.

Standards for phone communications

- Answer calls by the 3rd ring; this means staff members must be trained to work together and personnel in the treatment area need to answer the phone if the client service representatives cannot answer a phone by the 3rd ring.
- Hold times should be no longer than 1 minute
- Apologize for putting clients on hold and thank them for their patience when returning to the call
- Use a standard greeting and do not rush the greeting

Standards for greeting clients

- Immediately acknowledge clients that enter the reception area
- Greet clients enthusiastically with a smile. Greetings such as “Welcome to (hospital name). Is this Jake?” are appropriate.
- Us the client’s name when speaking to them. For example, use phrases such as “Mrs. Smith, we’re ready to see Chloe now. Can you follow me to the exam room?”
- Interact with pets using the pet’s name and the correct sex of the pet

Standards for exam room interactions

- Explain every action to the client so they know what is being done
- Use at least one visual aid to better educate pet owners

When establishing standards, be as specific as possible to avoid any ambiguity about the delivery of service that is desired. Having a standard that states “Be nice to all clients” is too vague and subject to interpretation by individual employees.

I recommend veterinary teams develop client service standards by starting with 3-5 standards for various categories of client interactions as described above. It’s helpful to have different teams in the practice brainstorm on the standards and reach consensus. For example, the client service representatives can work on standards involving phone interactions and the technical team can work on standards for exam room interactions. Once the standards are agreed upon, they need to be written and distributed to the entire team.

Train To The Standards

Client service standards will only ensure consistency in the delivery of service to pet owners and raise the quality of service you provide if the entire team adheres to the standards. It is not enough to create standards. You must train to your standards! All existing employees and new hires must go through a formal training process. Supervisors, middle managers, team leaders and doctors can assist with training and should be role models for the rest of the team. Remember to start with a small number of standards first. It is difficult to remember a long list of standards and change behavior patterns. Assess your progress every few weeks or monthly after you initiate standards. Once the staff is trained and shows consistency in adhering to a few standards, you can incorporate more standards if desired.

New Generation of Culture

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Overview

As millennials enter our workforce, the veterinary field is finding itself facing difficult questions: What exactly do these young people want? Why do they behave this way? You have heard people talking about how “lazy" and independent Millennials are perceived to be before. However, what you have not heard is how we can utilize the amazing traits they are bringing to the workplace to create a culture that all four generations currently working can love. This is the focus of The New Generation of Culture, complete with concepts you can implement in your practice immediately to boost your culture, along with a conversation about how to bring the most loved corporate culture in the world, Google, into your veterinary practice, helping you to attract and retain the best possible talent available.

Notes

- What do Millennials want?
  - 62%: make the world a better place[1]
  - 72%: be their own boss[1]
  - 79%: have a boss who is a coach or mentor[1]
  - 88%: collaborative work environment[1]
  - 74%: flexible work schedules[1]
  - 88%: work-life *integration*[1]
  - 68%: be associated with industry leader[1]
  - 90%: for their voice or opinion to matter[1]
  - 12%: be wealthy[1]
  - NOTE: career position NOT on this list
- Gen X’ers and millennials have a lot of differences, but also some key similarities:
  - Both want to pursue passions
  - Both share the expectation of multiple careers
  - Both know it is hard to find permanent work
  - Both need and want professional independence
  - Both understand the need to be flexible in career
  - Both highly value and expect lifelong learning
  - Both are prepared to work long days or weeks
  - Both are willing to live at home if needed.
- Typical veterinary culture is stale and stuffy, “command and conquer,” passive aggressive. Not conducing to happy millennials
- The future of work environments:
  - Inclusive management
  - Collaboration
  - Continual feedback
  - Goal focus
  - Casual relationships
  - Employee-driven motivation
  - Frequent turnover
  - Hire for culture
  - Team training

- Better performance evaluations
  - Ranking or rating performance evaluations DON'T WORK
  - Should not be a grading of day to day activities: this should be addressed daily
  - Performance evaluations should consist only of:
    - Summary of progress or failure to progress
    - Addressing ONGOING issues
    - Re-evaluate goals and set new ones
  - Goal focus:
    - Critical part of performance evaluation process
    - Have at least a monthly check-in with each employee to discuss goal progress
- Routine feedback
  - Millennials want feedback 50% more often than other employees, but everyone wants and needs it.[2]
  - Benefits of routine feedback:
    - Reduces confrontational nature of coaching
    - Face to face time with manager: validates employee
    - Platform for positive feedback
  - Don't forget the manager!!
- Appreciation/ recognition
  - Make sure feedback is specific, not, "Great work today," or, "Thanks for your help!"
  - Specific feedback comes across as genuine, general feedback comes off as disingenuous
  - Best ways to show appreciation: thank you cards and daily recognition
- Develop personal relationships
  - They want to know who you are, and they want you to know them, too.
  - Coffee/ Breakfast/ Lunch with the Boss
    - Once a month
    - Talk about:
      - Where they grew up
      - How their kids/ spouse/ partner is doing
      - What they wanted to be when they grew up
      - Recent vacations or special events
      - And... YOU!
    - It's OK to be vulnerable and imperfect!

- Inspiration and Motivation
  - iVET360 surveyed 200 hospitals
  - Mission for 199 of them: Take great care of the patients and clients
  - To attract the best, you have to define how you are different.
    - Client and patient care SHOULD be a given
    - State what you believe in
      - Trusted neighborhood veterinarian
      - Changing the landscape of veterinary care
      - Enhancing quality of life for pets in our community
      - Creating a comfortable environment to promote healing for pets and their people
    - Then, ACT on it!
      - Require community service, maybe even pay for it
      - Participate in charity events
      - Host community events
      - Make "Fear-Free" changes
      - Make your practice "green"

- Lily Padding= structured delegation
    - Treats a career like a pond, not a ladder
    - Creates “lateral transfers” that promote growth and learning
    - Benefits:
        - Many people can jump in
        - No “hoarding” information
        - Reward those who succeed, coach those who don’t
        - Frees up the hospital manager
- Building Better Bosses
    - Millennials leave for 3 reasons [3]:
        - No connection to mission, their work “doesn’t matter”
        - Dislike co-workers
        - Horrible bosses: the most common reason for anyone to leave their job
    - Google: Project Oxygen= 8 Behaviors for Great Managers[3]
        - AKA: how to build a better boss
        - 8 Behaviors:
            - Express interest and concern for goals and well-being
            - Be productive and results oriented
            - Be a good communicator
            - Help with career development
            - Have a vision and share it
            - Use your skills to advise
            - Be a good coach
            - Empower the team, don’t micromanage
    - How to use:
        - Yearly performance evaluations for you and managers. Ask the staff to review you and the leadership team anonymously
        - Thank them for being honest, even if it hurts
        - Then, ACT on the feedback.

Want the handouts and forms from this presentation? Download them at https://ivet360.com/checklists/

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Becoming a Loving Leader

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Summary
Often, leaders in the veterinary field feel they must be dictatorial to get the results they want from their staff. This heavy-handed approach, however, is seen by younger generations as "old-school," abrasive, and even hostile. Leading this way now drives away some of our brightest talent, leaving us with individuals who have learned to "put up" with this kind of direction. In Leading with Love, we discuss how today's veterinary professionals prefer to be communicated to, how the same principles that make our personal relationships work are also appropriate for our work relationships. Based on Joel Manby's *Love Works*, we will discuss seven key principles of leadership, translating them into actionable concepts that you can use in your practice the moment you return. We will wrap up with a discussion of simple Rules of Engagement for Supervisors, a list of rules to help ensure a harmonious, yet productive and mutually accountable work environment.

Notes

- Gallup poll of 2 million employees: Most rate a caring boss higher than how much money they make [1]
- Millennials:
  - 12% prioritize "being wealthy" as a goal
  - 79% want a boss who is a coach or mentor [3]
  - 88% prefer a collaborative environment [3]
  - 90% feel their voice and opinion should matter
- All people want to be respected at work, fewer and fewer will tolerate a disrespectful environment
- When asked, "How long would you tolerate a poor supervisor before quitting?"
  - 1995: 5-10 years
  - 2014: 5-10 months
- Supervisors and managers are #1 reason people love or hate their jobs
- Leading with love will help you be the premier "employer of choice" in your area
- 4 Greek words for love:
  - Eros: lusty love
  - Philos: brotherly love
  - Storge: familial love
  - Agape love: loving behavior, not a "feeling"
- Agape love:
  - Foundation for the best relationships
  - Deliberate and unconditional
  - Can exist in most difficult environments, especially work'
  - You can treat someone with agape love, even when you don't like them personally
- It's hard to talk about. We speak openly about business strategy, harder to talk about how to treat people
- 2 key things to remember:
  - When you don't like someone, that is when you need to BEHAVE like you love them
  - Treat all people with love at all times
- Joel Manby: *Love Works:* Discusses 7 key words to remember for working with others

- **Patient: Self-control in difficult situations**
  - Be genuine. False praise kills credibility
  - Praise without specifics is worse than no praise at all
  - Don't "compliment sandwich" Be upfront, honest, and kind in your criticisms
  - Don't be patient with poor performance, be patient in how you RESPOND to it

- Think before you speak, wait for the right moment and the right words
- How can I be more PATIENT:
  - Wait until you can admonish in private. Respect their dignity, they are human, too.
  - Get to the point, be specific, get them back on track, and then never mention it again
  - Stop. Breathe. Plan, then discuss
  - Praise 3 times more than you admonish

- **Kind: Show encouragement and enthusiasm**
  - Every interaction, you can make their day better or worse. It is your obligation top make it better, and never worse
  - “Making their day better” is contagious and increases energy, effectiveness, and productivity
  - The enthusiasm of the client experience can never rise above the enthusiasm of your employees
  - Kindness is about intentionally creating and maintaining the right environment so the team can deliver an enthusiastic client experience.
  - How would employees rate **you** on kindness factors like enthusiasm, passion, and encouragement?
  - How can I be more KIND:
    - Meaningful thank-you notes to staff. Take the time to encourage
    - Meaningful thank-you notes to staff’s family
    - CEO: Chief Encouragement Office: How many employees can be CEO?

- **Trusting: Place confidence in people**
  - Trusting your team is critical to building a climate of positive morale and performance
  - Taking over projects, hoarding information, shooting down ideas, and interrupting others are signs of distrust. Tells the they are not important; that you are better than they are
  - Interruption isn’t efficient, and it isn’t just rude, it’s degrading.
  - Treating yourself differently shows disrespect and lack of trust
  - Trustful leaders must let people do their own jobs, find their own solutions, and even make occasional mistakes to learn.
  - How can I be more TRUSTING:
    - Let your team make some decisions:
      - Responsible: who is responsible, “owns” the recommendation
      - Approve: Who has to approve, “owns” the decision
      - Consult the people directly affected
      - Inform the rest of the team
    - Trust people until proven wrong
    - Be a listener, always

- **Unselfish: Think of yourself less**
  - Selfish leaders need to remind people they are in power, like to hold on to power instead of giving it away
  - Giving time and talent to develop leaders is an excellent example if being unselfish in the organization
  - Don’t become “numb” to the needs, emotions, and personal issues in employee’s lives. Listen and care.
  - Wait until you can admonish in private. Respect their dignity in your words and actions
  - Decide to decide less. If you are becoming involved in someone’s work, you have lost faith in their judgement.
  - How can I be more UNSELFISH:
    - Give your skills to make the company and world better. Give your time to others
    - Be unselfish with making decisions. Strong leaders of strong companies make fewer decisions

        - Ask more questions, without your own opinions already formed, to make better decisions

- **<u>Truthful: Define reality</u>**
    - Create rules in meetings to get to the truth:
        - Don't shoot the messenger
        - Don't confuse disagreement with conflict (conflict happens when people take disagreement personally)
        - Don't assume others will see it your way
        - See the truth
        - Speak up
    - If we love our team, it is critical their voices are heard, opinions considered.
    - Getting the truth out ensures real decisions are made with the company and employee's best interest
    - Leaders must be held accountable for their actions, their truth.
    - Firing someone is when truth is critical, as well as love and care and compassion. Protect their dignity.
    - How can I be more <u>TRUTHFUL:</u>
        - Be honest, not soft, and truthful with employees
        - Firing someone should never be a surprise. If it is, you have not done your job and have not been honest
        - Speak last so as not to influence the thinking of the team. Easier to find the corporate truth when you get out of the way.

- **<u>Forgiving: Release the grip of the grudge</u>**
    - What was done to you doesn't matter in the end. All that matters is how you respond
    - Giving someone a second chance doesn't always work out, but consider it anyway
    - Forgiving those who wronged you or the organization releases you to focus on relationships and not anger
    - Forgiveness has a positive ripple effect that often extends far beyond our comprehension
    - How can I be more <u>FORGIVING:</u>
        - Forgive those who have wronged you or the practice
        - Be slow to fire and quick to forgive
        - Never say anything negative about a prior client or employee

- **<u>Dedicated: Stick to your values in all circumstances</u>**
    - Leader primary role: give and inspire hope. Achieved through clarity of vision, mission and values; creates financial success
    - Great leaders need to use both love and power
    - Measure BE goals and DO goals:
        - DO goals: career choice, reaching a revenue goal, growth plans, etc.
        - BE goals: What kind of person do I want to be? What kind of values do I uphold? What is my integrity when no one is watching?
    - Leaders must make difficult decisions, how they handle them separates who does and doesn't lead with love
    - It is possibly to lead with love during the tough times, but it takes dedication.
    - How can I be more <u>DEDICATED:</u>
        - BE goals for leaders: What kind of leaders do we want? What kind of behaviors and attitudes are expected? How will they balance love with DO goals?
        - Stick to your values in all circumstances
        - Remember, love works, not EVEN in hard times, but ESPECIALLY in hard times
- How can I implement?
    - Supervisor Rules of Engagement

  - Keep the rules handy (How can I be more…)
  - Evaluate with love
  - Same as/ More of/ Less of
  - DO goals/ BE goals
- Only 10% of companies have clearly defined values. Be one of the 10%
- Leading with Love is a higher testament to one's leadership ability than fear-based, power-hungry, or back seat management

MAKE THEIR DAY BETTER. ALWAYS.

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