Vermont Veterinary Medical Association

2019
WINTER MEETING

Sunday, February 10, 2019
Burlington Hilton Hotel

Wendy S. Myers, CVJ
President, Communication Solutions for Veterinarians
wmyers@csvets.com

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Thanks for being a VVMA Member!

We are pleased to welcome the following members who joined since our 2018 Summer Meeting

Charley Abernathy – BEVS
Ashley Ackert – Green Mountain Vet. Hospital
Dana Ames – West Mountain Animal Hospital
*Lauren Blume – Peak Veterinary Referral Ctr.
Shannon Bradley – Essex Veterinary Center
Earl Brady – Cold Hollow Veterinary Services
Adrian Flanders – Fitzgerald Animal Hospital
*Miranda Fritz – Mountain View Animal Hospital
*Jeanne Harding
Brian Hurley – Gardner Animal Care Center
Krista Jones
Andrew Koenitzer – Ark Veterinary Hospital
Kayla Miner – Affectionately Cats
Kathryn Miller – West River Valley Vet. Services
Nicole Poppenger – Animal Hospital of Hinesburg
Matthew Reimert – East Haven Veterinary Service
*Michael Romp – Vermont Air National Guard
Nicholas Sherman – Essex Veterinary Center
Allaire Smith-Miller
Lainie Springer – BEVS
Mallory Sullivan – BEVS
Kathereen Tamburello – Newport Vet. Hospital
Jaclyn Torzewski – VT-NH Veterinary Clinic
Elisabeth Zenger – BEVS
Courtney Zwahlen – Peak Veterinary Referral Ctr.

Congratulations new VVMA Life Members!

Life members are veterinarians who have been state VMA-dues paying members for thirty-five (twenty of which must be Vermont VMA membership years). Life members are exempt from Association dues but retain all privileges of membership. They also receive reduced registration rates at VVMA CE programs. Thank you to the following members who reached Life Member status this year. We appreciate your long-time commitment to the VVMA!

Steven Carey – Retired
*David Lamb – Vermont Equine Medical
Barbara LeClair – Riverbend Veterinary Clinic
*Chris Mangini – Retired
Steve Wadsworth – Northwest Veterinary Associates

*** Attending this 2019 Winter Meeting!**

Vermont Veterinary VVMA Medical Association

88 Beech Street Essex Jct., VT 05452
802-878-6888 office
www.vtvets.org
kathy@vtvets.org

VVMA Mission:
Promoting excellence in veterinary medicine, animal well-being and public health through education, advocacy and outreach.

VVMA Vision:
To be the preeminent authority on veterinary medicine and animal well-being in Vermont.

VVMA Values:
Integrity, Service, Dedication, Compassion, Inclusivity, Visionary Thinking, Life-Long Learning

For questions or more information on the VVMA, contact Executive Director Kathy Finnie.

2019 Winter Meeting Exhibitors
Thank you for your support of our Meeting!

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Nestle Purina PetCare Company	Lauren Koron	lauren.koron@purina.nestle.com
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How to Keep Doctors on Time

Wendy S. Myers, CVJ, President, Communication Solutions for Veterinarians Inc., 6455 Montano Place, Castle Pines, CO 80108, USA; 720-344-2347; wmyers@csvets.com; Csvets.com; Facebook.com/csvets; YouTube.com/csvets; @wendysmyers

Meet your consultant

Wendy S. Myers, CVJ, has been training veterinary teams for more than 20 years as owner of Communication Solutions for Veterinarians in Castle Pines, Colorado. She helps healthcare teams improve telephone and communication skills that result in getting more pets the medical care they need. Wendy shares her expertise through conferences, online courses, and monthly CE webinars. She is a certified veterinary journalist and author of five books. For five years, Wendy was a partner in an AAHA-accredited specialty and emergency hospital, which was sold to a corporate group. Wendy belongs to the American Animal Hospital Association and serves on a committee for the Foundation for Veterinary Dentistry.

What you'll learn

- Understanding clients' expectations, preferred appointment times and average waits
- What to tell clients while they're waiting
- Tracking wait times for benchmarking
- Scheduling techniques that will help you strive to have timely exams
- Rescuing medical staff from chatty clients—or moving a chatty doctor onto the next exam
- Options to see sick patients and work-ins
- Proven strategies to keep doctors on time

Understanding clients' expectations and average waits

How long do patients wait to see physicians?
Americans can expect to wait 20 minutes to see their family physicians, according to a survey by Vitals.com, a physician review website. The growth of urgent care centers and walk-in clinics has slightly decreased wait times in traditional doctors' offices. There are now about 1,600 walk-in clinics across the country, with 3,000 expected by 2017 as patients say they prefer to see doctors without having to wait days to schedule an appointment, according to the Convenient Care Association.[1]

Unlike physicians' offices, veterinary hospitals must see patients for preventive care, illness, surgery, dentistry and emergency care—all in the same day. The schedule can easily spiral out of control without an organized and efficient system for booking patients.

How long do pet owners wait to see veterinarians?
Wait time is an issue at most veterinary hospitals, and it gets worse the larger the practice. Research from 10,000 companion animal practices participating in a 2010 online American Veterinary Medical Association (AVMA) study paints a concerning trend. In a five-doctor practice, a client waits 19 minutes during a busy part of the day before being escorted into an exam room. Then the same client waits nearly 10 minutes to check out. For a 20-minute preventive exam, a client's waiting time totals 29 minutes or more than the length of the appointment itself, with the entire visit taking 49 minutes. In the best-case scenario, a client of a solo practice waits 5 minutes to see the veterinarian during a normal part of the day and it takes 4 minutes to pay, for a total of 29 minutes.

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Average client wait time in lobby

Size of practice	Average client wait Normal part of day	Average client wait Busy time of day
1 doctor	5 minutes	14 minutes
2 doctors	5 ½ minutes	15 minutes
3 doctors	6 ½ minutes	17 minutes
4 doctors	6 ½ minutes	16 ½ minutes
5 doctors	7 minutes	19 minutes

Average client wait time at checkout

Size of practice	Average client wait Normal part of day	Average client wait Busy time of day
1 doctor	3 ½ minutes	7 minutes
2 doctors	3 ½ minutes	8 minutes
3 doctors	4 minutes	8 minutes
4 doctors	4 minutes	8 minutes
5 doctors	4 minutes	9 ½ minutes

The busiest times in most hospitals are the first and last two hours of the day that your business is open.[2] If your clinic is open from 8 a.m. to 6 p.m., your heaviest appointment volume would be 8 to 10 a.m. and 4 to 6 p.m. A Zoetis U.S. study of 18,000 clients identified their preferred times for veterinary care:

When do veterinary clients want appointments?[2]

Appointment time	Best time
Saturdays, 8 a.m. to 12 p.m.	34%
Weekdays, 8 to 11 a.m.	28%
Weekdays, 5 to 8 p.m.	26%

How long are clients willing to wait?
The answer is 15 minutes, according to a National Research Corp. study of 10,000 human medicine patients. If another 15 minutes pass without explanation, patients say they would become angry and some will leave.[3]

What to tell clients while they're waiting

No one likes to wait. Be a client advocate and be aware of how long pet owners are waiting.

Provide updates every 15 minutes. Communicate that you appreciate the client's patience and are staying in touch with the medical team for the latest updates. Instead of "I'm sorry for the wait," say *"Thank you for your patience."* This replaces the negative words of sorry and wait with positive ones of thanks and patience. Say this proactive phrase even when the client hasn't been good-natured because you want to reward the behavior you want.

"<Client name>, thank you for your patience. I know you have been waiting 15 minutes. I checked with the nurse, and we should be ready to see you in 10 minutes. Can I bring you water or coffee? We appreciate your patience while our team is caring for another patient. I will update you again in 10 minutes, so you have the latest information."

If the wait time occurs during checkout say: *"<Client name>, thank you for your patience. I know you have been waiting 15 minutes. I checked with the nurse, and the doctor is finishing your*

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pet's medical record. We should have your medical record updated and invoice ready within 10 minutes. Can I bring you water or coffee? We appreciate your patience while our team is completing your pet's medical record. If the delay will be more than 10 minutes, I will update you with the latest information."

Post a sign. Invite clients to approach your client-service team. Post a counter sign that reads, "If we have not attended to you in 15 minutes, please see the receptionist."

Have clients wait in the lobby, not in exam rooms. Sitting in a windowless 8-by-8-foot exam room might have clients feeling trapped in solitary confinement. Boredom could lead to impatience and anger. Let's say you're performing in-house laboratory tests and results will take 15 minutes. Tell the client, *"For your comfort, let's have you wait for your pet's test results in the lobby. You can help yourself to beverages and literature. We have free Wi-Fi if you'd like to visit us on Facebook."*

Lobby amenities[4]

For clients	For pets
Beverages such as coffee, water and sugar-free juice boxes for children	Jar of healthy treats
Bulletin boards with educational topics	Grassy walking area for energetic dogs
Wall-mounted pamphlet rack	Pet relief area with baggies and trash can
Shopping for retail items	Laundry basket filled with towels sprayed with Feliway for clients to cover cat carriers
Television (www.petcaretv.com, play at low volume or muted with closed captions)	Paper bowls on your water cooler for pets
Wi-Fi so clients can visit your website, Facebook	Separate dog and cat waiting sections
Magazines	Slip resistant rug or mat at entrance for traction

Tracking your wait times for benchmarking

Measure current wait times so you can set a goal for improvement. To get the pulse on your wait times, have receptionists keep a log periodically. For one week, ask receptionists to record check-in and checkout times for every appointment. Your practice-management software also may have this capability. Track wait times on weekdays as well as Saturdays because service bottlenecks might occur during specific times and days, which will help you identify trends.

Share results of your wait-time log during a staff meeting. Discuss trends and brainstorm ideas to shorten wait times. Every team member must help develop solutions for your initiative to be successful.

Sample wait time log

Doctor	Dr. Smith
Appointment time	9:00 a.m.
Day of the week	Monday
Client and reason for visit	Brenda Reagan, Brandie, 6-year-old Australian Shepherd, adult preventive exam
Time client arrived	8:55 a.m.
Time client enters exam room	9:10 a.m.
Time client exits exam room	9:35 a.m.
Time client checks out	9:47 a.m.
Comments	Waited for heartworm preventatives and chart to come to front desk

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Results	Minutes	Trend/Comments
Time waiting in lobby before exam	15	Client arrived 5 minutes early
Time in exam room	25	5 minutes over scheduled 20-minute exam
Time to check out	12	Waiting for pharmacy and charges to be entered
Total visit time	**52**	

Solutions to reduce wait time for this scenario:
1. Have receptionists ask clients at check-in: *"What food and medication refills do you need today?"*

2. Have the nurse step out of the exam room to fill preventatives as the doctor explains exam findings. The nurse should say to the veterinarian, *"I will go refill Brandie's flea/tick and heartworm preventatives while you finish the appointment. Are there any additional medications that Brandie will need?"*

Proven solutions to keep doctors on time

Service distinguishes your hospital from neighboring practices. Clients judge your business based on the total service experience, from the receptionist greeting them and their pets by name, the nurse taking a good history and vital signs, the doctor thoroughly explaining the exam and findings, and the receptionist who presents the invoice to show value. Any slip-up or excessive wait during the service experience is what the client remembers, not how wonderful the doctor was. You can't practice high-quality medicine and have poor client service—the scale is out of balance. To retain and attract clients, a thriving veterinary practice needs both exceptional service and medicine.

Solution 1: Encourage clients to be on time with confirmation texts, emails and/or calls.

Best: Texts
Texts have a 99% open rate and 95% of messages get read within 3 minutes of being sent.[5] Use services that allow two-way texting such as:

- AllyDVM, www.allydvm.com
- AVImark Rapport, https://avimark.net/practice-solutions/rapport/
- Dialog Health, www.dialoghealth.com/animalhealth
- IDEXX Pet Health Network Pro, www.idexx.com/en/veterinary/software-services/cornerstone-software/pet-health-network-pro/
- VitusVet, http://content.vitusvet.com/request-a-demo-of-the-vitusvet-vet-app-csvets
- Zipwhip, https://www.zipwhip.com/blog/special-20-off-for-veterinarians/

For existing clients, your text would say: <Pet name> has an appt with Dr. <Name> beginning at <time> on <date>. Reply C to confirm, RS to reschedule.

For new clients, your text would be: We look forward to meeting <pet name> at <time> on <date>. Get driving directions at <bit.ly link>. Reply C to confirm, RS to reschedule.

Use text and email together. Cut check-in time in half when you set expectations before the day of surgical and dental procedures. Text the client, "See you tomorrow at 8 a.m. for Alex's surgical admission. No food after 10 p.m. Water is OK. We emailed surgical forms to <email>. Reply with questions." The text prompts the client to check his email, where you can provide detailed fasting instructions and attach consent forms and treatment plans.

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Better: Emails
Email open rates in medical, dental and healthcare are 22%, significantly lower than text.[6] If you're confirming appointments by email or text, send notices four days in advance. Some clients may not check personal email daily.

Your email message might say, "We will see <pet name> for surgery tomorrow at <Your Veterinary Hospital>. Please withhold food after ___ p.m. tonight. Water is OK to drink to prevent dehydration. Your surgical admission begins at 8 a.m. with a nurse, who will spend 15 minutes reviewing the consent form, answering your questions, and getting phone numbers where we can reach you the day of the procedure. I've attached your treatment plan and anesthesia consent forms. To speed your admission, please bring these signed forms with you, or we are happy to answer questions during check-in. Please allow at least 15 minutes for <pet name>'s admission to our hospital. If you have questions, call or text 555-555-5555."

Good: Calls
If clients don't respond to text or email confirmations, remind them two days before exams with phone calls. Let's say your client works at a retail store and must keep her cell phone in her employee locker during work. Mid-day, you leave her a voicemail message confirming tomorrow's 9 a.m. exam for her dog. The client's shift ends at 6 p.m., which is the same time your hospital closes. After listening to your message, the client calls you at 6:15 p.m. and leaves a voicemail cancelling tomorrow's exam for her dog. Your client-service team starts answering telephones the next morning at 8 a.m.—just one hour before the cancelled exam. Chances are slim that you'll refill the empty slot within an hour. Instead of confirming exams one day before, call clients two days in advance. Because you've notified the client two days in advance, you can replace the open exam with another appointment if the client cancels or reschedules.

Day of appointment	When to confirm
Saturday or Sunday (if open)	Tuesday
Monday	Wednesday
Tuesday	Thursday
Wednesday	Friday
Thursday	Saturday
Friday	Sunday (if open) or Monday

"This is <your name> with <Your Veterinary Hospital> confirming your <pet name's> appointment with Dr. <Name> on Monday ***beginning*** *at 9 a.m. Please bring a teaspoon-sized stool sample that's fresh within ___ hours, as well as any medications and supplements you're giving. If you have questions, call us at 555-555-5555."*

The phrase "beginning" instructs the client to be in the lobby and ready to see the doctor at 9 a.m.—not down the street at Starbucks. Appointment reminders train clients to be on time so they respect your schedule and you respect their time.

Solution 2: Lead the scheduling call.
A client calls and explains, "My dog has diarrhea. Do you have an appointment available at 3 p.m. today?" The receptionist replies, "Yes, we have 3 p.m. available." Because you already have sick-pet exams at 2:30 and 3:30 p.m., you will have three sick-patient exams in a row if you schedule this client at 3 p.m. Instead of asking callers "When do you want to come in?" guide them to specific times that will have your day flowing smoothly and reduce wait-time. Say, *"We could see your sick pet today at 1 or 4 p.m. Which fits your schedule?"* This results in a better client experience and keeps your schedule on time because you can sandwich the sick pet exam at 4 p.m. between a preventive exam at 3:40 p.m. and another at 4:30 p.m.

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Ask these questions to direct the pace and efficiency of the call:

1. What will be seeing <pet name> for?
2. Is there a doctor you prefer?
3. Which day of the week works best for you?
4. Do you prefer an appointment in the morning, afternoon or early evening?

Sick pets should be seen the same day, while clients calling for preventive exams should be seen within one week. Aim for an exam pattern of preventive care / sick / preventive care. Always sandwich a sick-patient exam between two preventive exams, which are more predictable and likely to stay on time. It's OK to schedule preventive care exams back-to-back but it's better to use them as "slices of bread" that hold your schedule together.

Solution 3: Schedule visually, making a layered club sandwich.
When booking appointments, color code your schedule based on the reason for the visit. Strive for a checkerboard of colors. It's like making a club sandwich (bread, lettuce, cheese, tomato, bacon, turkey, bread). If you'd make a club sandwich with two slices of bread followed by the remaining ingredients and then pick up the sandwich to take a bite, it will fall apart in your hands. Likewise, your schedule will crumble if you don't create structure. Think of preventive exams as the bread that holds the schedule together.

At a glance, color-coding allows you to keep your appointments balanced between preventive and sick-patient exams. If you stack one sick pet exam after another, doctors will run behind. For example, schedule preventive-sick-preventive appointments in a group rather than sick-sick-sick. A sick pet will require extra time and diagnostic tests.

When you schedule visually with color codes, receptionists can easily see if they've achieved a balance between preventive and sick-pet exams. Most practice-management software lets you use color codes. Create a color legend such as:

- Green = Preventive care exams
- Yellow = Sick patients
- Purple = New clients
- Pink = Euthanasia
- Red = Urgent care (same-day sick pets)
- Blue = Medical progress exams and diagnostics
- Orange = Forward booked appointments made 6 to 12 months in advance

Exam Time	Doctor 1	Doctor 2
9:00 a.m.	20 minutes for preventive care Debbie Smith (existing client) Max, dog, Newfoundland 555-555-5555 Adult preventive care exam Note: See breed so you put this patient in a larger exam room.	30 minutes for new clients Wendy Myers (new client) Alex, cat, DSH 555-555-5555 Adult preventive care exam
9:10 a.m.		
9:20 a.m.	20 minutes for complicated medical/surgical discharge Cindy Duncan (existing client) Champ, dog, Labrador retriever	
9:30 a.m.		20 minutes for preventive care Bonnie Thompson (existing client)

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	555-555-5555 Complicated surgical discharge, orthopedic case	Thunder, dog, Malamute 555-555-5555 Adult preventive care, forward booked 12 months ago
9:40 a.m.	20 minutes for puppy/kitten exam Vi Corn (existing client) Sherlock, kitten, 12 weeks, DSH 555-555-5555 Second kitten exam	
9:50 a.m.		20 minutes for puppy/kitten exam Courtney Peters (existing client) Spike, dog, Jack Russell 555-555-5555 Fourth puppy visit
10:00 a.m.	BLOCKED: 30 minutes for urgent care Reserved for same-day appointments Available to schedule any type of exam if not filled 90 minutes prior to 8:30 a.m.	
10:10 a.m.		10 minutes for medical progress exam Bob White (existing client) Spike, dog, mixed breed 555-555-5555 Ear infection
10:20 a.m.		30 minutes for senior preventive care Brenda Reagan (existing client) Brandie, dog, Australian Shepherd 555-555-5555 Senior preventive care exam, forward booked 6 months ago
10:30 a.m.	20 minutes for preventive care Dale Richmond (existing client) Lucy, 12 weeks, Golden Retriever 555-555-5555 Second puppy visit	
10:40 a.m.		
10:50 a.m.	20 minutes for progress exam for illness Jeff Marsh (existing client) Disney, dog, Yorkie 555-555-5555 Disease-management exam: renal, urinalysis	BLOCKED: 30 minutes for urgent care Reserved for same-day appointments Available to schedule any type of exam if not filled 90 minutes prior to 9:20 a.m.
11:00 a.m.		
11:10 a.m.	40 minutes for attended euthanasia John Smith Tiger, cat, DSH 555-555-5555 Attended euthanasia	
11:20 a.m.		40 minutes for vomiting Beverly Sanchez (existing client) Rocky, dog, Pug 555-555-5555 Vomiting
11:30 a.m.		
11:40 a.m.		
11:50 a.m.	Doctor's lunch	
12:00 p.m.		20 minutes for complicated medical/surgical discharge

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Solution 4: Schedule the length of the appointment based on the reason for the visit.
If you put every patient into the same time slot, you risk getting behind or having gaps in your schedule when a follow-up exam just takes a few minutes. Use the flex-10 scheduling system for maximum efficiency and on-time performance. Laws about which duties credentialed nurses may perform vary by state. Check your state's practice act at www.avma.org/Advocacy/StateAndLocal/Documents/scope_vet_assistant_duties.pdf.

Doctor appointment lengths

Length of exam	Type of appointment
10 minutes	Booster vaccines without exams (i.e. Lepto, Lyme, Bordetella, etc. Could be a nurse appointment depending on your state's practice act.) Medical progress exams (Don't say recheck, which sounds free and optional.) Surgery admission and discharge for new clients
20 minutes	Adult preventive exams, age 1 to 6 Complicated medical/surgical discharge Medical progress exam for illness Second, third or fourth puppy/kitten exams
30 minutes	Chest / abdomen / bladder x-rays (Nurses may take x-rays but the doctor needs 15 to 20 minutes to interpret images and discuss results and treatment with clients.) Illness Kitten visits that include feline leukemia/FIV testing Limping (may take x-rays) New clients Eye exams Quality of life consultations Second opinions Senior preventive exams, age 7 and older Skin cases Unattended euthanasia (Admission, good-byes, consent form) Urgent care
40 minutes	Attended euthanasia (May need additional time for visitation, Paw Print, etc.) Diarrhea Exotic pets First puppy/kitten exams (It's OK to double-book the doctor because the nurse does most of the client education.) Vomiting

Solution 5: Use urgent care slots to see sick patients the same day.
It's 8 a.m. and your clinic's phone is already exploding. Four clients have called with sick pets and need to be seen today. Building urgent care slots into your daily schedule has these benefits:

- Provides needed patient care
- Increases client loyalty
- Ensures healthy practice revenue

To plan for sick patients that must be seen the same day, block urgent care slots in your schedule. Reserve three 30-minute urgent care slots per doctor per day. You may need more urgent care slots on Mondays, Fridays and Saturdays, when most practices see a higher volume of sick patients.

How many urgent care slots do you need? Estimate 20% of exams will be same-day sick patients. If your veterinarian sees three exams per hour and has appointments for six hours, he would see 18 patients per

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day. If you allocate 20% as same-day sick patients, you would need to block four urgent care exams in the schedule. Look at last week's schedule and tally the number of patients per doctor per day. Then calculate the number of urgent-care slots to predict future schedules.

In a multi-doctor practice, stagger urgent care slots for each doctor by one hour. If two doctors both have urgent-care slots at 10 a.m., you might cause traffic jams in the treatment area for workups and have doctors playing "steal the nurse" game.

Here are sample urgent care blocks with two doctors seeing appointments:

Doctor 1	Doctor 2
10:00 a.m.	11:00 a.m.
1:00 p.m.	2:00 p.m.
3:00 p.m.	4:00 p.m.

Schedule the last urgent care slot 60 to 90 minutes before closing time to avoid employee overtime. Overtime affects at least four employees: 1 doctor, 2 nurses and 1 client service representative.

If a client calls at 11 a.m. with a sick pet, use the two-yes-options technique, guiding her to two exam times that will flow well for today's schedule. Say, *"A doctor needs to see your sick pet today. We have urgent-care appointments at 1 or 4 p.m. Which fits your schedule?"*

If urgent-care appointments don't get filled within 90 minutes of the blocked time, release them for any client. Let's say you have an urgent care slot at 10 a.m. It is now 8:30 a.m. and no one has called with a sick pet. Open the exam to any pet owner seeking care. A client calls at 8:30 a.m. and says, "I have a new puppy. Can I bring him in today?" If the urgent-care slot at 10 a.m. hasn't been taken, reply, *"Congratulations on your new baby. We have an appointment at 10 a.m. today. Does that work for you?"*

Solution 6: During check-in, ask if clients need medication and food refills.
AVMA research identified checkout as the biggest bottleneck in companion animal practices, with checkout times ranging from 4 to 10 minutes. Oftentimes, clients wait for preventatives and medication refills at checkout.

To proactively solve this problem, receptionists should ask clients upon check-in, *"Do you need medication, preventatives or food while you're here today?"* Check your practice-management software to see the date of last purchases and quantity sold. If yes, the receptionist sends the request to the pharmacy at the beginning of the appointment rather than waiting for the doctor or nurse to handle the request at the end of the exam. Then the medication or food is waiting for the client at the front desk upon checkout or is delivered into the exam room at the end of the appointment.

Solution 7: Text or call clients when they are 15 minutes late.
This strategy encourages clients to be on time while letting you choose options to see their pets if they have been unexpectedly delayed. If it's 3:15 p.m. and the client has not arrived for a 3 p.m. exam, text: "We expected to see you at <time> for <pet name>'s appointment. Reply YES if you're on your way, RS to reschedule."

If calling, say, *"Hello, <client name>. This is <your name> from <Your Veterinary Hospital>. We expected to see you and <pet's name> at 3 p.m. Please call us to let us know everything is OK, or to reschedule your exam. We want to help <pet name> get the medical care he/she needs. You can reach us at 555-555-5555."*

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You're more likely to reach the client on her cell phone and can determine whether she forgot the exam or is delayed in traffic. When the client rushes in at 3:15 p.m., say, *"<Client name>, I'm glad you're here. We left you a text/voicemail because we were worried something happened to cause you to be late. Let's see which options we have to see your pet."*

This message communicates your compassion yet subtly tells the client she needs to be prompt. Then determine options you can offer such as letting the client wait with the expected time, seeing another doctor if one is available, admitting the pet for services with a later pickup or rescheduling the appointment. This client-centered approach shows her time is as valuable as yours.

Option 1: Offer to see another doctor if one is available.
"<Dr. Name 1> is performing emergency surgery and won't be able to see <pet's name> at 2 p.m. <Dr. Name 2> is available during that time. Can we still see you and <pet's name> at 2 p.m. with <Dr. Name 2>?"

Option 2: Ask if the client can wait (work-in).
"We had an emergency surgery this morning, and <Dr. Name> will be finished in 30 minutes. Are you able to wait? If not, we can admit <pet's name> to the hospital. You can pick her up in a few hours, or you can reschedule your appointment. Which is convenient for you?"

Option 3: Reschedule the appointment.
If you know in advance that the appointment might be delayed, call the client. For example, the client has a 10 a.m. preventive exam and you know the veterinarian will be in emergency surgery until 11 a.m. Call the client and say, *"<Dr. Name> had an emergency surgery this morning and needs to reschedule <pet's name> exam. Could you come at 3 p.m., or would you prefer to admit <pet's name> to our hospital and have <Dr. Name> examine him during the afternoon? Then you could pick <pet's name> up after 5 p.m.? Which is convenient for you?"*

Option 4: Offer a day admission (~~drop-off~~ appointment).
The client can bring the pet to your hospital and the doctor can see the patient at a time that's convenient for his schedule. When you schedule a day admission for your convenience (i.e. we're fully booked, need time to run tests or must work-in a patient) the client is not charged for hospitalization. When the day admission is for the client's convenience, charge a 1- to 12-hour hospitalization or day boarding fee.

If day admission is for your convenience: *"<Dr. Name> is performing emergency surgery and won't be able to see <pet's name> at 2 p.m. We could admit <pet's name> to the hospital so <Dr. Name> can examine your dog after he finishes surgery. Then you could pick up <pet's name> after 5 p.m., or we could reschedule. Which do you prefer?"*

If day admission is for client's convenience: *"We'd be happy to provide services for your pet's annual checkup as a day admission. For 15 minutes, you will meet with a nurse, who will ask you history questions, get your pet's vital signs and review which services and products are due. We will get your cell phone number in case the doctor has questions. You may pick up your dog after 5 p.m. Because we will care for your pet throughout the day, there is a day admission charge of $___. When will you arrive for your pet's day admission?"*

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Solution 8: Train staff and doctors to rescue each other from chatty clients.
If the veterinarian is trapped in a personal conversation with a chatty client, the nurse can step in and say, *"Doctor, is there anything else you need as you wrap up your appointment?"* This subtly tells the doctor the next client has arrived and prompts the client to ask any final questions.

Use body language. Use stools for doctors and nurses in exam rooms. When a doctor sits to explain his diagnosis and recommendations, his body language communicates, "You have my complete attention, and I want to focus on you and what your pet needs." When he stands, the body language politely signals, "Our visit is finished."

If a nurse opens the appointment and a client begins a lengthy description of her dog's problem, she might interject, *"Let me repeat the two key problems that your dog is experiencing so I can go get the doctor now and keep your appointment on time."* This redirects the conversation and lets the client know that you value her time. Another approach might be, *"The doctor will need to hear all of those important details from you. Let me finish the brief history and then you can share that information with the doctor."*

Solution 9: Move a chatty doctor onto the next exam.
Dr. Popular is the most requested veterinarian at your hospital, thanks to his 30 years of experience and jovial bedside manner. Although his exams are scheduled every 30 minutes, he often runs 20 minutes behind. While he is efficient with exam time, personal conversations trap him. Employees get frustrated with waiting for his stories to finish while they're calming angry clients in the lobby. Could this favorite doctor be hurting client retention and practice revenue?

Your favorite doctor is a key business asset, so approach him privately about his extended conversations. Come prepared with a time-flow study documenting his average exam times and suggested solutions. Take a collaborative approach and say, *"Clients love your expertise and bedside manner. We both want happy clients as well as efficient exam time. When appointments stay on schedule, we reduce clients' wait time and stress on the medical team. I've measured average lengths of your exam times for one week to determine where the bottlenecks happen. I'd like to share the results with you and get your input on solutions."*

Use a secret code. Let's say your hospital has three exam rooms. Establish a secret code with your team such as saying the next client is in Exam 4. Because you don't have four exam rooms, this lets the medical team know that rooms are overflowing, and you need to speed the schedule back on track. Say, *"Excuse me, <Dr. Name>. I have your next patient ready in Exam 4. Can I bring you anything as you wrap up this appointment?"*

Solution 10: Use timers to monitor your timeliness. Have the staff member who escorts the client into the exam room start a timer. Clip the timer onto metal doorframes. Before walking into the exam room, the doctor can glance at the timer to see how long the client has been waiting and know the remaining time available.
If the client has waited more than 5 minutes, don't say, "I'm sorry you had to wait." This reinforces the client's negative emotions. Instead, say, *"Thank you for your patience. I know your time is important. Let's get started."*

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Solution 11: Use whiteboards on the back of exam doors.

Available at office supply stores, buy a small whiteboard with a dry-erase pen. Use removable wall-saver tape to mount the whiteboards next to exam doors that face the staff hallway. Before nurses greet clients and patients in exam rooms, they would write on the whiteboard:

- Time appointment began in exam room
- Client and patient name
- Reason for visit

This summary alerts the doctor of how long the client has been waiting. Let's say it's 10:30 a.m. and the client has been waiting in the exam room since 10:15 a.m. Because the doctor knows that 15 minutes of valuable exam time has expired, she can prioritize the visit and be efficient with her time.

Solution 12: Install signal flags.

To keep exam rooms turning quickly and let doctors and staff know what's going on inside the exam room, set up your own coding system using colorful signals.

The position and color of the signal flags can be used to designate which doctor is inside or the status of each room (occupied, ready for cleanup, nurse in room, ready for doctor, patient ready for lab or x-rays, etc.) Order signal flags from Quill Healthcare at www.quill.com or 800-982-3400. Choose from signal flags with two to eight flags in various colors.

Which goals will you implement from today's training?

1. _____

2. _____

3. _____

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How to Master Forward Booking

Wendy S. Myers, CVJ, President, Communication Solutions for Veterinarians Inc., 6455 Montano Place, Castle Pines, CO 80108, USA; 720-344-2347; wmyers@csvets.com; Csvets.com; Facebook.com/csvets; YouTube.com/csvets; @wendysmyers

Meet your consultant

Wendy S. Myers, CVJ, has been training veterinary teams for more than 20 years as owner of Communication Solutions for Veterinarians in Castle Pines, Colorado. She helps healthcare teams improve telephone and communication skills that result in getting more pets the medical care they need. Wendy shares her expertise through conferences, online courses, and monthly CE webinars. She is a certified veterinary journalist and author of five books. For five years, Wendy was a partner in an AAHA-accredited specialty and emergency hospital, which was sold to a corporate group. Wendy belongs to the American Animal Hospital Association and serves on a committee for the Foundation for Veterinary Dentistry.

What you'll learn:

- Best practices to adopt from dentists
- Techniques to forward book progress exams, preventive checkups, disease-management exams, and procedures
- What to tell clients to lead them to book future exams now
- How to organize your schedule for forward booking
- Ways to prevent no-shows with serial confirmations of texts, emails and calls

Do you want $40,000 in additional revenue for your hospital this year? An American Animal Hospital Association (AAHA) report found that forward booking 10% of checkups could lead to this significant income boost, which equals 3% revenue growth for a typical practice.[1] Gone are the days when you need to wait for clients to schedule appointments on their own or be prompted with a reminder. Forward booking will revolutionize your business. Benefits of forward booking include:

Provide timely preventive care for patients. When patients return for timely checkups, your team has more opportunities to catch preventable health problems before they escalate into serious conditions. When you identify obesity, dental disease, arthritis, and other health conditions early, you may offer more treatment choices and affordable options to pet owners. Consider the difference between treating early kidney disease compared to renal failure.

Keep your appointment schedule full. Your goal is to have every appointment filled every day. A full schedule means your hospital is operating at maximum capacity, which ensures healthy profits and better staff utilization.

Reduce the staff labor spent on overdue reminder calls. Your goal is to have 70% or more of clients book pets' exams after receiving up to three checkup reminders. When clients ignore emails, texts, and postcards, your team needs to be patient advocates and call clients with overdue pets. If a full-time veterinarian works five days a week with 15 to 20 appointments per day, the average number of appointments per year would be 3,900 to 5,200, or an average of 4,550 appointments.[2] If 70% of appointments are make through reminders, the remaining 30% of clients will need to be called. Did you know the average phone call to schedule a healthcare appointment takes 8 minutes?[3] Consider the amount of staff labor to make 1,365 calls per doctor times 8 minute per call. The result is 10,920 minutes or 182 hours of calls. While overdue reminder calls generate significant income and need to be a priority, you can greatly reduce the labor with forward booking.

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Cut telephone time spent booking exams. When clients get reminders about pets' checkups and procedures, they call to book appointments with each call averaging 8 minutes. If the doctor sees 20 appointments per day, a client care coordinator invested 160 minutes or 2.6 hours per day to book those exams. In a four-doctor hospital, receptionists collectively spend 10.4 hours per day scheduling appointments. If more clients book at checkout, the front-office team will have fewer future scheduling calls. This lets them deliver a higher level of service to visiting clients and spend time on income-generating projects.

Save on postage because you don't need to mail checkup reminders. A postcard stamp is $0.35 plus the cost of inhouse or outsourced printing, which can easily equal $1 or more per reminder. If each doctor averages 4,550 appointments annually, a four-doctor hospital could spend up to $18,200 or more on postcard reminders. More practices are cutting back on snail mail, using forward booking and text and email notices.

Stop marketing promotions during slower seasons because you're consistently busy. Every February, you run a dental special to fill empty procedure time. Don't do it! Discounting may harm clients' perception of value and could cause pet owners to delay procedures, waiting for the sale. When you forward book procedures and exams, you'll enjoy a consistent schedule and avoid seasonal downturns.

Best practices to adopt from dentists

Forward booking has been a standard practice for dentists for more than a decade. Only 5% of veterinarians use forward booking compared to 80% of dentists.[4] Here are words of wisdom from dentists:

Make and save money with forward booking. For more than 25 years, Lee Weisbard, DDS, has provided general, implant, and cosmetic dental services at Weisbard Dental in Greenwood Village, Colorado (www.weisbarddental.com). Dr. Weisbard says 90% of her patients forward book their next appointments. This strategy lets her team enjoy a full schedule, meet monthly income goals, and reduce confirmation calls because patients automatically get text notifications. Forward booking saves her practice time and money, Dr. Weisbard touts. "Dentistry is predictable. We know where patients are from a periodontal perspective," says Dr. Weisbard. "Forward booking lets me get my patients to optimal health, and then they are on a maintenance schedule." She encourages veterinarians to embrace this business strategy. "Veterinary clients need to know that pain is the body's way of saying, 'We have a big problem,' " she says. "Don't wait until the pet is sick to seek care. Forward booking prevents costly procedures, ensures optimal health, and saves pet owners money."

The hygiene department contributes 25% to 35% of gross practice production, and hygienists produce about three times their wages.[5] During the hygiene appointment, 75% of restorative needs are discovered. In veterinary medicine, the preventive care exam is where veterinarians frequently diagnose dental disease, obesity, kidney disease, and other health problems that need treatment. Preventive visits feed your follow-up exam and procedure schedules.

The medical team schedules the next exam. Dental practices focus on scheduling recare appointments in the hygiene room, which is done by the hygienist who is part of the medical team. Julie Whiteley, RDH, worked as dental hygienist and is now an instructor at Massachusetts College of Pharmacy and Health Sciences University in Boston. Rather than delegate forward booking to front-desk employees, she did it while the patient was still in the hygiene room.[6] "Patients for whom I made appointments were less likely to miss those appointments. When I booked them, I made it clear that I was reserving time especially for them and would mention something that we would be doing or following up on at that next appointment and why it was important," Julie writes in *Dentistry IQ*. "Patients are less likely to break an appointment

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with you, as you have a different relationship with them than a person from your front-desk team. They don't want to let you down."

If your veterinary hospital has computers in exam rooms, veterinary nurses could forward book appointments now. The upcoming appointment will print on today's receipt, and appointment confirmations will be automated in your practice-management software.

Lead clients to schedule. Dr. Weisbard advises picking the same day of the week and time as today's appointment. Use benefit statements, telling the patient what is in it for him. He gets his first appointment choice because the dentist isn't easily available, and he can choose the time that best fits his schedule, Dr. Weisbard advises. When I visited Tom A. Kampfe, DDS, in Centennial, Colo., my hygienist Yvonne pulled up the appointment schedule while I was still in the dental chair. She said, "Let's schedule your next visit now, which will be the week of January 23. I see that you usually make appointments on Monday or Friday mornings. Would Monday, January 23 at 8 a.m. work for you?" Yvonne led me to schedule and was savvy enough to check my preferences. I asked her how many patients forward book. She replied, "About 90%. I'm persuasive because if patients don't schedule, I must call them. It saves us both time when we schedule now."

Veterinarians who have been early adopters of forward booking report impressive results. The 2016 Canadian Practice Owners Economic survey showed 45% of Ontario veterinary hospitals booked patient exams one year in advance and 87% of clients agreed to schedule their pets' next exams.[7] Median hourly revenue per doctor in those practices was 7% higher than in hospitals that did not forward book. Encouraging a client to forward book can result in three appointments per year, according to the Well-Managed Practice Study.[8]

Techniques to forward book exams and procedures

Get staff buy-in first. A Veterinary Hospital Managers Association (VHMA) study found some staff is reluctant to try forward booking because of a fear of taking risks.[9] This attitude of "If it ain't broke, don't fix it" can limit practice growth. We are conditioned to stick with scheduling systems that work (sort of) rather than risk trying a new approach. Fear is not a compelling reason to disregard a best practice. Focus on the benefits of forward booking for patients, clients, and your team.

Don't just watch this course and tomorrow announce to your front-desk team, "We are going to forward book every client as of today." Think of your Mom saying, "Because I said so." Veterinarians and managers will likely get more pushback from employees than clients. The "secret sauce" to getting your team to buy into the concept of forward booking is to explain the "why" behind this patient care and business strategy: 1) Proactively manage patients' health and catch diseases earlier, 2) Give great client service because pet owners get their first choice of time, day and doctor, 3) Generate future hospital revenue, and 4) YOU WILL MAKE FEWER REMINDER CALLS! Employees are tuned into WIFM: What's in it for me?

Tell, don't ask. Use benefit statements to lead pet owners to schedule. Direct the client to a specific date and time, increasing the likelihood she will schedule. If the client is here at 10 a.m. on a Wednesday, she can probably visit again at a similar time and day of the week. Known as the two-yes-options technique, this phrasing guides clients to accept future exams.

Brienna Richardson-Hammer, hospital manager at North East Animal Hospital and Wintergreen Animal Hospital in Erie, Pennsylvania, says employees don't get pushback from clients. "We don't give our clients the option. While they're in the exam room with the doctor, our front-desk staff is automatically forward booking their next appointments," she explains. Pet owners get an appointment reminder card

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at checkout, and employees explain they will call one month before forward-booked exams to make sure appointments still fit clients' schedules. "We've had zero pushback and have crazy good compliance," Brienna says.

Here's how to use forward booking for four appointment types:

1. Medical progress exams
Veterinarians excel in this category. A VHMA Insider Insights Report found 76% of teams schedule medical progress exams.[1] Tell clients when their pets need to be seen next, avoiding the yes-or-no choice of "Do you want to schedule your next appointment?" Follow the guideline of "same day, same time, same doctor."

Seeing the same veterinarian builds client confidence that the medical problem will be resolved and provides exam efficiency. If a different doctor sees the patient for follow up, he may spend twice the amount of time reviewing the medical record to learn the previous veterinarian's diagnosis and treatment. Tell the client, *"Dr. <Name> needs to see your dog in two weeks for a medical progress exam for Duke's ear infection. Does this same time, 9 a.m. on Jan. 31, fit your schedule?"*

Select from three approaches to schedule care now:

- **Choice 1:** If you have computers in exam rooms, book follow-up care now. You risk having the client walk through the "mind-erase hallway" on the way to the front desk to check out. Because the client is focused on leaving, he forgets to schedule. The receptionist may not know that follow-up care is necessary unless she reads the diagnosis in the medical record.
- **Choice 2:** Put an alert in your software or use a travel sheet. This notifies receptionists to schedule medical progress exams before checking out clients for today's services.
- **Choice 3:** Do a verbal handoff. The doctor or nurse walks the client to the checkout counter and tells the receptionist, *"We need to see Duke again in two weeks for a progress exam for an ear infection. Could you please schedule that with Dr. <Name>?"*

Avoid the term "recheck," which clients may perceive as free and optional. "Medical progress exam" clearly communicates you're following up on a previously diagnosed condition. Update this term in your practice-management software.

2. Procedures
Give clients information to decide on treatment on the day of diagnosis. After the veterinarian explains his diagnosis and your anesthetic protocols, answer the client's questions. Have a nurse present a treatment plan that lists medical services and fees. The nurse would tell the client, *"Now that Dr. <Name> has answered your questions, he asked me to go through the treatment plan with you, so you understand the services and fees. I will show you photos of a pet's dental procedure that illustrates each of the steps. I can share information about our payment plans through <third-party financing>. Then you can decide how you want us to proceed."* After reviewing the treatment plan, ask for a commitment to treat. Lead the client to book now with the two-yes-options technique: *"We can perform the dental procedure on Monday or Wednesday. Which do you prefer?"*

Busy practices may have full surgical and dental schedules for two or more weeks. If clients don't schedule elective procedures on the day of diagnosis, you may have limited availability that cause them to seek faster care elsewhere. Focus on what you can do, not what you can't. Say, *"Dr. <Name's> next available surgery days are Jan. 23 and 24. Which do you prefer?"*

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3. Disease-management exams
Create categories of exams to distinguish reminders and fees. Use pediatric, adult, and senior preventive exam codes for routine checkups. When a pet is diagnosed with a chronic health condition, change the preventive exam code to a disease-management exam. This pre-appointing concept is especially important for patients with chronic health conditions such as cardiomyopathy, hyperthyroidism, kidney disease, and diabetes. Forward booking will let the veterinarian provide optimal disease management. Clients also will appreciate that the veterinarian has spread out the cost of care.

Set the reminder interval based on the frequency of follow-up care. Let's say you diagnose a dog with arthritis and prescribe a non-steroidal anti-inflammatory drug and therapeutic diet. You want to see the patient every six months for exams and drug monitoring tests.

After explaining the diagnosis and answering the client's questions, tell her, *"Because Daisy was diagnosed with arthritis today and will begin long-term medication, I need to see her every six months to successfully manage her arthritis and check blood work in case we need to adjust medication dosages. Six months from today would be June 16. I could see Daisy at 9 a.m. or 3 p.m. Which do you prefer?"* Explain the "why" behind the change in frequency of exams and use benefit statements.

4. Preventive checkups
Six out of 10 pet owners will forward book their pets' checkups.[1] Use a comparison that clients already understand: Dentists. Say, *"Just as your dentist has you schedule your next appointment at checkout, we do the same to proactively manage your pet's health. Dr. <Name> could see your pet at 10 a.m. on Wednesday, June 14 or 3 p.m. on Friday, June 16. Which do you prefer?"* The first choice is the same day of the week and time as today's appointment. The second choice is a different day of the week and time of day (morning vs. afternoon).
When a procrastinator won't book, be persistent and use benefit statements. Say, *"I understand you don't know your schedule 12 months from today. Let's book your pet's next checkup for this same day and time next year. We will confirm two weeks before the exam, so if you need to change the appointment it will be easy. By scheduling today, you will get your first choice of doctor, day, and time. Your appointment reminder for 10 a.m., Wednesday, Jan. 17 will print on today's receipt."*

How to organize your schedule for forward booking

Make forward booking part of your checkout process. When you finish today's exam, schedule the next visit. Clients are familiar with this checkout process from their dentists and hair stylists.

Build your schedule 12 months out. You will need to have doctors' schedules in your software for 12 months in the future. Don't worry if work schedules change due to veterinarians' conference attendance or vacations. Doctors will often request time off one or more months in advance, especially when buying plane tickets and registering for conferences. Because you'll confirm forward-booked exams two weeks ahead, you can easily move appointments. Call the client and say, *"Dr. <Name> asked me to call you to reschedule Daisy's disease-management exam on March 16 because he will be out of the office. Can the doctor see Daisy at the same time, 10 a.m. on Wednesday, March 21, which is just one week later?"*

Designate an appointment type for forward-booked exams. Your practice-management software has codes for appointment types such as medical progress exams, sick-patient exams, preventive checkups,

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euthanasia consults, and others. Just add forward-book exams as another appointment type. Set a unique color code to flag that these exams were booked six or months in advance.

Use forward-booked blocks for scheduling efficiency. Pre-blocking your schedule lets you plan for efficient, timely visits. Aim for the scheduling pattern of preventive care / sick / preventive care. You're more likely to stay on time if you sandwich a sick-patient exam between two preventive checkups. Color code your exams by appointment type so you may visually schedule for efficiency.

Design a legend using color blocks by exam type:

Appointment type	Color
Orange	Forward booked exams scheduled 3 to 12 months in advance (includes checkups and disease management)
Green	Recently booked preventive checkups
Blue	Medical progress exams
Red	Urgent care or same-day sick patients
Yellow	Sick-patient exams
Purple	New clients
Pink	Euthanasia
Brown	Disease-management exams

Here is a sample schedule that is 3 months in the future. You'll see two forward-booked and two open appointments, which will fill as the date nears. Color blocking lets you space appointments for efficiency, aiming for the scheduling pattern of preventive care / sick / preventive care.

Exam Time	Doctor 1
9:00 a.m.	20 minutes for adult preventive exam Bonnie Thompson Thunder, dog, Malamute 555-555-1234 Adult preventive exam (Forward booked 1 year in advance)
9:20 a.m.	30 minutes for sick patient Appointment is currently open and will be scheduled as the date nears.
9:50 a.m.	30 minutes for disease-management exam Vi Corn Sherlock, DSH, age 16 555-555-1234 Disease-management exam for kidney disease (Forward booked 3 months in advance)
10:20 a.m.	BLOCKED: 30 minutes for urgent care Reserved for same-day sick patient appointments

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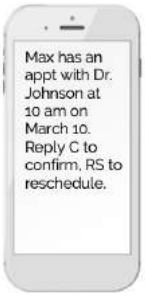
Ways to prevent no-shows with serial confirmations of texts, emails and calls

Electronically confirm the future appointment today. When clients forward book exams, send a text or email confirmation through your practice-management software or app. Mobile notices can sync the appointment time and date on the pet owner's calendar (Apple, Google calendar, Outlook). Digital calendars allow the pet owner to set alerts, including the travel time to your hospital. An alert of when it's time to leave for the appointment will pop up on the client's mobile phone, computer, and tablet thanks to syncing. When I booked my next appointment with my hair stylist, she sent me a text confirming the time and date. I added the appointment, which was six weeks away, to my calendar today.

Send a series of appointment confirmations. To avoid no-shows, confirm forward-booked exams with a series of three reminders:

When to confirm	Type of reminder
1. 2 weeks before appointment	Text or email
2. 4 days before appointment	Text or email
3. 2 days before appointment (only if client did not reply to electronic notices)	Phone call



Confirm exams two weeks in advance in case clients need to reschedule. Use text and email confirmation for efficiency. If clients have not responded to electronic notices, call them two days before forward-booked exams to confirm. If the client reschedules or cancels, you have an entire business day to refill the empty slot.

Forward booking doesn't fall on the shoulders of receptionists alone. Doctors, nurses, and client care coordinators must support one another's efforts to secure follow-up care. Clients need to hear a consistent message that you're working together as a team to proactively manage their pets' health.

Set a goal to forward book 75% of checkups. Schedule a staff meeting to explain the "why" behind forward booking, emphasizing preventive care, early detection, better management of chronic conditions, stronger client retention, and increased income. Your team needs to believe in the concept of pre-appointing before it will become a habit.

As a veterinary consultant, I advise teams to give a new concept at least three months before passing judgment. Don't just throw your hands up after one week of trying and say, "Well, that didn't work." The VHMA study reported some teams' first efforts to implement forward booking were not successful.[9] Don't abandon the initiative, VHMA advises. If the first try didn't get results, revisit why and then revise your strategy with the entire team's input. "Be brave, be positive, and accept the challenge of moving forward with forward booking!" VHMA posts on its website (www.vhma.org).

Measure, and then move forward. At Gull Lake Animal Hospital in Richland, Michigan, employees were forward booking 16% of patients, mostly medical progress exams.[7] Hospital Manager Cari Richmond previously worked in a human dental practice and knew forward booking could have a dramatic impact. She solicited input from teammates, revised travel sheets so veterinarians could note when patients needed to be seen next, and explained the goal was to help the practice provide "the right care at the right time for every patient." Together, the team developed this plan:

- Veterinarians told clients when their pets' next appointments were needed and marked them on travel sheets before leaving exam rooms.
- Veterinary nurses and assistants walked clients to the front desk and let them know that the client service representative would book their next appointments.
- Client care coordinators forward booked exams based on information on travel sheets.

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- The hospital manager tracked appointments and shared forward-booking progress with the team, letting them work through issues.

After 12 months of implementation, the team went from 16% to 58% compliance. Cari won the VHMA Forward Booking Contest and attributes the program's success to listening to her team, sharing metrics and progress, giving each teammate a role, and banishing the term "annual appointment," replacing it with "your pet's next appointment."

When your healthcare team implements proactive scheduling, you'll be better patient advocates and guarantee return client visits. Forward-booking exams has decades of proven success in human dental offices. Embracing this trend will ensure the health of your veterinary practice as well as your patients.

Quick-Reference Tips to Implement Forward Booking

1. Explain the "why" behind forward booking to employees.
2. Provide staff training in how to effectively schedule and scripts for client conversations.
3. Tell, don't ask when leading clients to forward book.
4. Be persistent and use benefit statements when clients won't commit.
5. Schedule future exams and procedures before today's checkout.
6. Designate an appointment type for forward-booked exams.

Which goals will you implement from today's training?

1. _____

2. _____

3. _____

Helpful resources	Link
Article: 4 ways to use forward booking	www.csvets.com/userfiles/4%20Ways%20to%20Use%20Forward%20Booking.pdf
Article: Forward book every patients next preventive exam	www.csvets.com/news/downloads/20047.pdf
Article: How to schedule more follow-up care	www.veterinarypracticenews.com/How-to-Schedule-More-Follow-Up-Care/
Course: Change your approach: Every month is dental month	https://shop.csvets.com/communication-skills/change-your-approach-every-month-is-dental-month/
Course: Creating the 5-star experience in the exam room	https://shop.csvets.com/communication-skills/creating-the-5-star-experience-in-the-exam-room/
Course: Follow-up calls that increase patient visits	https://shop.csvets.com/receptionist-skills/follow-up-calls-that-increase-patient-visits/
Forward booking tools	www.partnersforhealthypets.org/forward_booking.aspx
Preventive pet healthcare: Your guide to becoming a practice champion	www.vhma.org/page/ChampionWorkbook
Video: Forward booking: How you ask matters	www.youtube.com/watch?v=0fhiN1IpvsA&t=14s
Videos: Wendy's YouTube channel	www.youtube.com/csvets

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Facilitators' Guide

Choose a facilitator to lead your team's discussion. Create plans to implement goals you learned in this training program.

1. What staff training do you need to implement before kicking off forward booking?

_____

_____

_____

_____

_____

2. How will each teammate support forward booking? Explain each person's role.

CSRs _____

_____

_____

Nurses _____

_____

_____

Doctors _____

_____

_____

Hospital manager _____

_____

_____

3. What scheduling updates do you need to make to successfully implement forward booking?
(i.e. build schedule 12 months out, implement color codes by appointment type, etc.)

_____

_____

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10 Phone Skills Every Receptionist Should Know

Wendy S. Myers, CVJ, President, Communication Solutions for Veterinarians Inc., 6455 Montano Place, Castle Pines, CO 80108, USA; 720-344-2347; wmyers@csvets.com; Csvets.com; Facebook.com/csvets; YouTube.com/csvets; @wendysmyers

Meet your consultant

Wendy S. Myers, CVJ, has been training veterinary teams for more than 20 years as owner of Communication Solutions for Veterinarians in Castle Pines, Colorado. She helps healthcare teams improve telephone and communication skills that result in getting more pets the medical care they need. Wendy shares her expertise through conferences, online courses, and monthly CE webinars. She is a certified veterinary journalist and author of five books. For five years, Wendy was a partner in an AAHA-accredited specialty and emergency hospital, which was sold to a corporate group. Wendy belongs to the American Animal Hospital Association and serves on a committee for the Foundation for Veterinary Dentistry.

What you'll learn

1. Answer the phone with a smile
2. Place callers on hold
3. Juggle multiple phone lines
4. Establish rapport with callers
5. Take the perfect message
6. Transfer calls
7. Schedule exams efficiently
8. Get price shoppers to become new clients
9. Confirm exams and surgeries
10. Be a good listener

Receptionists are the face of your veterinary hospital. You want every caller to experience prompt and professional service. Being an excellent communicator over the phone will give callers confidence in the veterinary care that your hospital provides.

In *Veterinary Economics'* 2010 Benchmarks survey of Well Managed Practices, turnover was 26% for veterinary receptionists compared to a national average of 16%.[1] Clients notice when there are constant new faces at your reception counter. Practice owners and managers need to train to trust.

Great receptionists get great ongoing training. Just as licensed veterinarians and nurses need regular continuing education to keep pace with medical advances, receptionists need unending client-service training.

A friendly and efficient front-desk team is the cornerstone of a successful veterinary practice. If you don't hire the right employees and constantly reinvest in training, you may risk losing clients.

Phone Skill #1: Answer the phone with a smile

Deliver a welcoming greeting. Mirror the personality of a Golden Retriever during phone conversations. Golden Retrievers are well-mannered, intelligent, perpetually happy and have never met a stranger. I often tell veterinary teams that "you get what you give," so be a Golden Retriever so you'll get friendly, happy attitudes in return from clients.

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If you give a triple espresso greeting, you'll transfer your stress onto the caller. The pet owner will likely be more demanding in return.

Even though client service representatives repeat the phone greeting hundreds of times each day, it creates a first impression with every caller every time. Let callers hear the smile in your voice and eagerness to help.

Answering the phone on the first ring is best, especially if the caller is experiencing a medical emergency with his pet. Set a standard of service to answer calls by the third ring. The longer your phone rings, the less important callers feel.

An effective phone greeting includes four elements: *"Welcome to <Your Veterinary Hospital>. This is <your name>. How may I help you?"*

Salutation: Say "Welcome to" or "Thank you for calling" rather than "good morning" or "good afternoon." On a busy day, you could risk answering the phone with a "good morning" greeting when it's 2 p.m., which tells the caller that you're not paying attention to details. This may cause her to lose confidence in your team, especially if she has a sick pet.

Business name: Always say the full name of the business, which is part of your branding.

Employee's name: Because veterinary medicine is a relationship business, always share your name. Callers need to know who is helping them. Clients often spend more time with the reception team than doctors and nurses. Client service representatives talk with clients over the phone, greeting them upon arrival, spend time in the lobby with waiting pet owners, and assist them again at checkout. You want clients to have as much confidence in the reception team as they do in the medical staff. Getting to know each other on a first-name basis helps establish this rapport and confidence.

An invitation for service: Let the caller know that you're eager to help.

Phone Skill #2: Place callers on hold

Ask permission before placing callers on hold. On average, 70% of business calls are placed on hold, so your clients will inevitably experience hold-time.[2] Small businesses, such as veterinary hospitals, have the longest hold times at 1 minute and 47 seconds.[3]

When you're the caller who is holding, the hold time feels three times longer. Holding for nearly 2 minutes feels like 6 minutes! How you place callers on hold shapes their perception of your business. Always ask for permission and WAIT for the answer.

Say, *"Welcome to <Your Veterinary Hospital>. This is <your name>. Is this a medical emergency, or are you able to hold?"*

Use the phrase "medical emergency" rather than "emergency" because some high-maintenance clients may assume that requesting prescription refills are emergencies. A caller with a medical emergency will need immediate assistance.

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Phone Skill #3: Juggle multiple phone lines

A typical two-doctor practice has seven support staff, which includes 2 receptionists, 4 nurses and 1 assistant who is cross-trained in reception and assisting duties. Many hospitals have four or more telephone lines. Because the number of phone lines often outnumbers receptionists, your team must be efficient at multitasking.

The busiest times in most veterinary hospitals are the first and last two hours of the day that your business is open. If your hospital is open from 8 a.m. to 6 p.m., your heaviest call and appointment volume would be between 8 to 10 a.m. and 4 to 6 p.m.

Receptionists must manage callers and visiting clients with professionalism, grace and efficiency. Juggling with confidence is a necessary job skill. An inefficient receptionist will frustrate callers and visiting clients.

Provide prompt attention. If you're on the phone when a client arrives, make eye contact, wave or nod. Your body language signals: "I will be with you in a moment." When you're finished with the call, stand to greet the visiting client. Standing communicates that you're eager to help and puts you on the same eye level.

Answer a call while you're helping a visiting client. Let's say a client is standing at the front desk with his credit card in hand and your phone rings. You need to make the client and caller feel equally important. Tell the client, *"Will you please excuse me for a moment, so I can place this caller on hold and then keep helping you?"*

Then answer the phone, *"Welcome to <Your Veterinary Hospital>. This is <your name>. Is this a medical emergency, or are you able to hold while I **finish** checking out another client?"*

The word "finish" tells the caller that the wait time will be brief. A client ready to checkout will be thankful that you're respectful of his time as well. It's also acceptable to swipe the client's credit card while answering the phone, especially if he's handing you the credit card.

Put a caller on hold to answer another incoming call. You're on Line 1 talking with a client and Line 2 rings. On the second ring, ask the current caller, *"Are you able to hold for a moment while I put another caller on hold, so I can keep helping you?"*

Then answer the second line, *"Welcome to <Your Veterinary Hospital>. This is <your name>. Is this a medical emergency, or are you able to hold? I am finishing helping another caller, and then I'll be right with you."*

Set expectations when you have two or more callers holding. Remember, callers can't see you, so you need to describe where they are in the calling cue. Say, *"Welcome to <Your Veterinary Hospital>. This is <your name>. Is this a medical emergency, or are you able to hold for a few moments? I have two callers ahead of you and will be with you as quickly as possible."*

Reintroduce yourself when picking up a call that has been placed on hold. Whether you put the original caller on hold or are picking up a line that another staff member initially greeted, always reintroduce yourself. Don't say, "Thank you for holding" because the word "holding" reminds the caller that she has been waiting and could be perceived as negative. Say, *"Thank you for your patience. This is <your name>. How may I help you?"*

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Phone Skill #4: Establish rapport with callers

When talking with callers, treat existing clients and price shoppers with the same respect and professionalism. Consider price shoppers as soon-to-be new clients because you want them to book exams today!

The first step in starting a relationship is to create rapport. Ask callers' and pets' names in the beginning of phone conversations and use them frequently throughout calls. This technique bonds price shoppers to your hospital and personalizes the call. Repeating names throughout the conversation communicates that you're listening. Here are ways to ask for the caller and pet's names at the start of the conversation:

Say, *"Welcome to our hospital. I'm happy to answer your questions. May I ask your name and your pet's / baby's name?"*

If the price shopper is uncomfortable sharing his name, simply ask for the pet's name. If the caller questions you about why you need a name, reply, "So I can get to know you and your pet." Remember, you've already shared your name during the phone greeting, so the caller knows who you are. Likewise, you want to welcome returning clients. When the caller says, "I just got my dog's reminder postcard and need to book an appointment." Respond with, *"Thanks for calling to schedule your pet's preventive care exam. May I have your name and your pet's name?"*

Asking the caller and pet's name lets you locate the correct patient in your practice-management software. For example, you likely have several clients with the last name of Myers and many patients named Max.

For existing clients, ask bonding questions such as:

- What will we be seeing <pet's name> for?
- How is <pet's name> doing?
- Does <pet's name> need any preventatives, medication or food refills when you visit us?

Phone Skill #5: Take the perfect message

Screen calls for doctors, so clients get help now and don't have to wait for returned calls. Ask about the reason for the call, saying, *"The doctor will be in surgery until 1 p.m. Could you tell me what your specific question is for Dr. <Name>? One of our nurse may answer your question now."*

If the medical question needs a doctor's response, take a message. Elements of a perfect phone message include:

- **Time:** The veterinarian will return calls flagged as urgent first, and then the oldest to newest messages.
- **Date:** Strive to return calls within the same day. Noting the date is especially important if the client called on a doctor's day off. When the doctor returns to work, he can return calls before morning exams begin.
- **Specific question:** This lets the doctor have the chart or electronic medical record in front of him as well as the answer before dialing the client's number.
- **Phone numbers where the client can be reached:** Ask for both the client's cell and home telephone numbers. A cell number is the best choice because you're more likely to reach the client and avoid telephone tag. If you get the client's cell number, update it in your practice-management software, where the latest contact information should be.

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- **Best time to return call:** Find out when the client will be available for the doctor to return her call so you lessen the chances of phone tag.
- **Your initials:** Should the doctor have questions about the message before returning the client's call, he knows which employee to consult.

Phone Skill #6: Connecting calls

Each morning, receptionists should check the surgery schedule to see which patients are being admitted for procedures and which doctors and nurses are on the surgery team. Receptionists act as a bridge that connects clients with your medical team. Clients may quickly lose confidence in the medical team if receptionists don't know which patients are having surgery today. Another point to remember: Every client assumes her pet is the only one having surgery today!

When connecting a call, don't say, "Please hold while I transfer you." The words "hold" and "transfer" could leave negative impressions. "Hold" tells the caller she'll be waiting. "Transfer" is confusing because you don't transfer people. Reruns of the TV hit "Star Trek" come to mind, when the crew would beam from the Starship Enterprise onto other planets—and sometimes a transporter accident caused a person not to rematerialize correctly or get propelled into a black hole.

Instead, use positive words that show action. Say, *"Let me connect you with the surgery nurse, <employee name>."* The word "connect" shows completion. You've also let the client know which employee will be picking up the call to assist her.

When paging the surgery nurse, describe the purpose of the call. The receptionist would tell the nurse, *"I have Mrs. Myers on Line 2, who is calling for a medical update on Caymus, a cat who is being neutered today."* Then the nurse can be prepared to greet the caller by name and provide the latest medical information.

When the nurse picks up the call, he would say, *"Hello, Mrs. Myers. This is <nurse name>, the surgery nurse. <Receptionist name> explained that you're calling for an update on Caymus. Let me tell you how surgery went…"* This hand-off shows your team is a cohesive unit who works together to provide exceptional patient care and client experiences.

Phone Skill #7: Schedule exams efficiently

Receptionists should lead the scheduling call, guiding clients to appointment times that will help your medical team stay on schedule and provide a better client experience.

A client calls and explains, "My cat has been vomiting all night. Do you have an appointment available at 1 p.m. today?" The receptionist replies, "Yes, we have 1 p.m. available." Because you already have sick-pet exams at 12:30 and 1:30 p.m., you would have three sick-patient exams in a row if you schedule this client at 1 p.m. Instead of asking callers "When do you want to come in?" guide them to specific times.

Show empathy and reply, *"I'm sorry to hear that your cat is sick. Let's schedule an urgent care exam today. We can see your cat today at 11 a.m. or 4 p.m. Which choice fits your schedule?"* This results in a better client experience and helps you keep your schedule on time because you can put the sick pet exam at 4 p.m. between a preventive care exam at 3:40 p.m. and another at 4:30 p.m.

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Ask four questions so you direct the pace and efficiency of the call:

1. What will be seeing <pet name> for?
2. Is there a doctor you prefer?
3. Which day of the week works best for your schedule?
4. Do you prefer an appointment in the morning, afternoon or early evening?

Sick pets should be seen the same day, while clients calling for preventive care exams should be seen within one week. Try to achieve an exam pattern of preventive care / sick / preventive care. Always sandwich a sick-patient exam between two preventive care exams, which are more predictable and likely to stay on time. It's OK to schedule preventive care exams back-to-back but it's better to use them as "slices of bread" that hold your schedule together. Your urgent care exams should be 30 minutes because you'll need time to run diagnostic tests.

Phone Skill #8: Get price shoppers to become new clients

A new client will typically spend $200 on the first visit for an exam, vaccines and diagnostic testing for a puppy, kitten or adult pet, according to the *AAHA Veterinary Fee Reference*, 9th edition.[4] The lifetime value of a new client who visits today with an 8-week-old puppy and returns for preventive care over the dog's 12-year lifespan will spend more than $13,000.[5] The practice would receive additional income if the dog had emergency care, therapeutic diet, long-term drugs, ear infections, illnesses, spay/neuter, or other medical care.

A receptionist will spend an average of 5 to 7 minutes to convert a price shopper into a new client. You will guide the caller through four steps to become a new client:

Step 1: Ask caller and pet names. Think of the price shopper call as the first date—you want to establish a relationship, have the caller fall in love with your clinic and begin a lifetime relationship of veterinary care. Phone shoppers aren't checking prices—they're looking for long-term relationships with your practice. Pet owners are seeking a veterinarian they can trust whether their pets need preventive care, emergency treatment or help resolving an illness or chronic medical condition.

When a caller asks, "How much are shots for a new puppy?" Reply with, *"I'm happy to provide that information. Let me start by asking your name and your pet's / baby's name."*

Step 2: Ask questions to determine needs. New pet owners may inquire about shots, but most don't know their new pet need exams, intestinal parasite tests, parasite preventatives, nutrition counseling and other services. Instead of delivering spiels, ask questions to determine needs such as:

- Where did you adopt your pet?
- How old is your pet?
- Which vaccines has your pet had?
- Which flea/tick and heartworm preventatives are you using?
- Has your kitten/cat been tested for feline leukemia and FIV?
- Has your puppy been spayed or neutered?

Answers will guide your conversation about which services and products the pet will need based on your hospital's standards of care.

Step 3: Describe service first, price last. Never lead with the price because callers will make immediate decisions without understanding services and their value. Here's an example of a new puppy call:

"For Elsa's first veterinary visit, she will have a nose-to-tail exam to check her growth and

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development. I know your breeder would want to be sure that you have a healthy puppy. Elsa will receive two puppy exams at 12 and 16 weeks. Because Elsa is a Yorkie and will go to a groomer, we recommend vaccinating her for distemper/Parvo and Bordetella, which protects her from a respiratory disease called kennel cough. (Explain other vaccines such as Lyme and Leptospirosis that are in your protocols). *When Elsa reaches 16 weeks, she will be vaccinated for rabies, which is required by state law. Elsa will receive an intestinal parasite test to check for worms, including parasites that can be passed from pets to people. We also will give Elsa medication to deworm her. We will start Elsa on monthly flea/tick and heartworm preventatives for ongoing protection. Elsa will get a puppy baby gift on her first visit, which includes a free dose of flea/tick and heartworm prevention, a leash, a 3-pound bag of puppy food, handouts on training and raising a healthy puppy, a vaccine record-keeper, a pet food measuring cup, treats for training, and 30 days of free pet insurance. This baby gift is valued at $100."*

Talk about free gifts for new clients such as a complimentary pedicure, free exams for new patients, or a free puppy/kitten kit. Always assign the retail dollar value to the free gift or service.

Step 4: Ask for the appointment. Be confident, not tentative. Ask, *"When would you like to schedule your pet's exam? We can see you today at 2 p.m. or tomorrow at 10 a.m. Which fits your schedule?"*

Avoid saying, "Do you want to book an appointment?" The word "when" is a yes answer compared to "do you want," which is a yes-or-no option. Strive to see newly adopted pets within 24 to 48 hours because many might have intestinal parasites, ear mites and upper respiratory problems.

Phone Skill #9: Confirm exams and surgeries

Confirm appointments two days in advance. Because you've notified the client two days in advance, you can easily replace the open exam with another appointment if the client cancels or reschedules.

Day of appointment	When to confirm
Saturday or Sunday (if open)	Tuesday
Monday	Wednesday
Tuesday	Thursday
Wednesday	Friday
Thursday	Saturday
Friday	Sunday (if open) or Monday

Why should receptionists confirm two days in advance? Let's say your client works at a retail store until 6 p.m. Like many businesses, her employer prohibits personal cell phone use while at work. At the end of her shift, she checks voicemail and hears a message from your hospital confirming tomorrow's 9 a.m. exam for her dog. The pet owner calls you at 6:30 p.m. to cancel tomorrow's exam and leaves a

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voicemail message for you because your hospital closed at 6 p.m. When your reception team arrives tomorrow morning and starts answering phones at 8 a.m., they have just one hour before the cancelled exam. Chances are slim that you'll refill the empty slot within an hour. Instead of confirming exams one day before, call clients two days in advance. Should a client cancel or reschedule, you have an entire business day to refill an empty appointment slot—and the chances are 100%!

"This is <your name> calling from <Your Veterinary Hospital> to confirm your dog's appointment with Dr. <Name> on Monday ***beginning*** *at 9 a.m. Please remember to bring a teaspoon-sized stool sample that's fresh within ___ hours, as well as any medications and supplements you're currently giving your dog. If you have questions or need to reschedule, please call us at 555-555-5555."*

The phrase "beginning" instructs the client to be in the lobby and ready to see the doctor at 9 a.m.—not down the street at Dunkin' Donuts. Confirmation calls help train clients to be on time.

Reminding clients to bring pets' stool samples will significantly increase compliance for intestinal parasite screening. Explaining the teaspoon-size quantity ensures you'll get a valid sample size. Avoid medical jargon such as "fecal."

Asking clients to bring all medications and supplements will help your team identify missed doses of parasite preventatives as well as unknown supplements or over-the-counter medications such as aspirin, fish oil and glucosamine. The client may be practicing do-it-yourself veterinary medicine at home, having self-diagnosed and self-prescribed glucosamine for her dog's suspected arthritis.

Confirm surgeries one day in advance. Confirmation calls have two important purposes:

1. To help clients allow enough time in their morning routine for check-in
2. Explain fasting instructions

Remove "drop off" from your vocabulary and hospital forms. "Drop off" implies the admission process will take seconds—hand you the leash or cat carrier and go. Instead of "drop off," use the term "surgical/dental admission," which is more professional and communicates there will be a check-in process.

Set expectations during confirmation calls so clients know how much time to plan for patients' admissions. Because clients need to understand the length of time, my confirmation scripts use the broken-record technique, and have you repeat, "Please allow at least 15 minutes for your pet's admission to the hospital."

If you have a specific admission time, say, *"This is <your name> calling from <Your Veterinary Hospital> to remind you of <pet name>'s surgical/dental procedure tomorrow. Please withhold food after ___ p.m. tonight. Your surgical/dental admission* ***begins*** *at ____ a.m. with a nurse, who will spend 15 minutes reviewing the consent form, answering your questions, and getting phone numbers where we can reach you the day of the procedure. Please allow at least 15 minutes for <pet name>'s admission to the hospital. If you have questions, please call us at 555-555-5555."*

If you have a window of time when patients check in for procedures, say, *"This is <your name> calling from <Your Veterinary Hospital> to remind you of <pet name>'s surgical/dental procedure tomorrow. Please withhold food after ___ p.m. tonight. Your surgical/dental admission is between ____ and ____ a.m. with a nurse, who will spend 15 minutes reviewing the*

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consent form, answering your questions, and getting phone numbers where we can reach you the day of the procedure. Please allow at least 15 minutes for <pet name>'s admission to the hospital. If you have questions, please call us at 555-555-5555."

Phone Skill #10: Be a good listener

Stay focused. Avoid distractions from colleagues and external noises. Concentrate on what your caller is saying. Keep a notepad at your fingertips. Jot down details such as caller and pet names, medication refill requests and keep track of which callers are holding.

Listen for emotions. Is the caller concerned because her pet is sick? Show empathy and offer an appointment today. Does the caller have a new puppy? Let her hear your excitement to meet her new pet.

Repeat names. Use caller and pet names throughout the conversation to communicate you're listening. Let's say a client calls in the morning because her cat has been vomiting all night. Here's an example of the conversation between the pet owner and client service representative (CSR):

Caller	Conversation	Tip
Pet owner:	"My cat has been vomiting all night. Do you have any appointments available today?"	
CSR:	"I'm sorry to hear that your cat is sick. Let's schedule an urgent care exam today. Can I get your name and your cat's name?"	**Tip:** Ask for caller and pet names. Show empathy.
Pet owner:	"My name is Wendy Myers, and my cat's name is Alex."	
CSR:	"Thank you. We could see Alex today at 10 a.m. or 1 p.m. Which time fits your schedule?"	**Tip:** Use the two-yes-options technique and strive to schedule preventive care exams next to your urgent care slots that are reserved for same-day-sick patients. You want to achieve the exam pattern of preventive care/sick/preventive care. Your urgent care exam should be 30 minutes because you'll need time to run diagnostic tests.
Pet owner:	"10 a.m."	
CSR:	"We will see you and Alex at 10 a.m. today with Dr. <Name>. Thank you for calling."	

Which goals will you implement from today's training?

1. _____

2. _____

3. _____

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5. Lifetime value of canine preventive care from 8 weeks to 12 years. Data on file at Communication Solutions for Veterinarians.

Helpful resources	Link
Article: 6 scheduling secrets for receptionists	www.csvets.com/news/downloads/20045.pdf
Article: Easy and effective word makeovers for receptionists	www.csvets.com/news/downloads/20043.pdf
Book: *101 Communication Skills for Veterinary Teams*	http://shop.csvets.com/books-and-videos/101-communication-skills-for-veterinary-teams/
DVD: Become a client communication star	http://shop.csvets.com/books-and-videos/videos-on-dvd-become-a-client-communication-star/
Video: How to ask callers to schedule appointments	www.youtube.com/watch?v=CSQuanVVJTA
Video: Using urgent care slots in your veterinary hospital's schedule	www.youtube.com/watch?v=roZ2WqUhp7w
Webinar: 4 easy steps to turn price shoppers into new clients	http://shop.csvets.com/receptionist-skills/4-easy-steps-to-turn-price-shoppers-into-new-clients/
Webinar: Be a telephone superstar	http://shop.csvets.com/receptionist-skills/be-a-telephone-superstar/
Webinar: Secrets to effective scheduling	http://shop.csvets.com/receptionist-skills/secrets-to-effective-scheduling/
Webinar: Secrets to lead phone shoppers to become new clients	http://shop.csvets.com/receptionist-skills/secrets-to-lead-phone-shoppers-to-become-new-clients/
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How to Tame Rude Clients

Wendy S. Myers, CVJ, President, Communication Solutions for Veterinarians Inc., 6455 Montano Place, Castle Pines, CO 80108, USA; 720-344-2347; wmyers@csvets.com; Csvets.com; Facebook.com/csvets; YouTube.com/csvets; @wendysmyers

Meet your consultant

Wendy S. Myers, CVJ, has been training veterinary teams for more than 20 years as owner of Communication Solutions for Veterinarians in Castle Pines, Colorado. She helps healthcare teams improve telephone and communication skills that result in getting more pets the medical care they need. Wendy shares her expertise through conferences, online courses, and monthly CE webinars. She is a certified veterinary journalist and author of five books. For five years, Wendy was a partner in an AAHA-accredited specialty and emergency hospital, which was sold to a corporate group. Wendy belongs to the American Animal Hospital Association and serves on a committee for the Foundation for Veterinary Dentistry.

Learn how to deal with these challenging clients:

- Texting Teresa is addicted to her cell phone, texting throughout her pet's exam
- Bossy Bob shouts "If I can't pay, you're just going to let my pet die?"
- Internet Irene says she knows what's wrong with her dog, "I Googled it."
- Suspicious Suzie asks, "Why are your prices so high? I can get my vaccines cheaper at a shot clinic."
- Price-Match Paul demands that you match an Internet pharmacy's price for his pet's medications
- Expletive Ed curses and belittles employees

You want mutually respectful client relationships, but some pet owners are challenging. Get solutions to tame rude clients and reward the behavior you want.

Texting Teresa

Texting Teresa is addicted to her cell phone, texting throughout her pet's exam. You need to explain her dog's Grade 2 dental disease and discuss treatment. Engage Teresa, so she may understand the diagnosis and decide to schedule the procedure.

Insensitive use of technology may become commonplace as pet ownership demographics shift. Millennials are now the primary pet-owning demographic at 35% of U.S. pet owners compared to Baby Boomers' 32%, according to the American Pet Products Association.[1] Millennials will add 2.6 million pet owners between now and 2020, and they spend more on veterinary care than Generation X and Baby Boomers.[2,3]

Millennials check their smartphones 43 times per day.[4] Regardless of generational differences, some clients may be addicted to email, text and social media. Surfing Facebook can become intoxicating and stupefying. Don't stay silent about bad mobile manners. Distracted clients may be incapable of making healthcare decisions, causing both patient care and hospital revenue to suffer. Here's how to get clients to stop texting and listen to you:

Use signs to establish ground rules. You'll be more comfortable and find it easier to get people to refrain from cell phone use rather than getting them to stop. Post signs in your lobby and exam rooms that encourage the behavior you want such as "During your appointment, we kindly request that you refrain from cell phone use, so we may discuss your pet's health." Have a custom sign made or order

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signs from www.mydoorsign.com or www.safetysign.com. Place signs in prominent locations such as the check-in desk and at eye level of client seating in exam rooms.

Redirect the conversation away from texting. While you want to bark, "I'll be back when you're done with your text," don't just leave the exam room for 10 minutes, which is equally rude and could result in a bad online review. Reclaim control of the conversation.

Tell the client, *"I see you're having an important text conversation with someone. Is your text about your pet's care today? I'm happy to provide answers so you may consult with that person after you have all the information from me. Could we discuss your pet's healthcare first, and then you could get back to your text?"*

Rather than accept ill-timed cell usage as a sign of the times, Sherry Turkle, an author and professor at the Massachusetts Institute of Technology, diagnosed the problem as, "We expect more from technology and less from each other."[5] To win over clients, you need to be more engaging than their smartphones. Involve them in exams, letting them listen to heart murmurs, having them peer into your microscope and sharing their pets' digital dental x-rays. Use show-and-tell demonstrations to capture clients' attention. At All Pets Dental Clinic in Weston, Florida, Dr. Jan Bellows, Dipl. AVDC, uses a smartphone to take photos of pets' mouths during exams. Smartphones let you adjust exposure, crop and markup images. Enlarge images of painful conditions such as resorptive lesions. Send the client home with pictures. Use the print feature to send the photo to a blue-tooth enabled color printer. Text or email images to clients and share them online in patients' portals.

Use a texting service through your practice-management software or a third-party provider to share the dental images with the client.

- AllyDVM, www.allydvm.com
- AVImark Rapport, https://avimark.net/practice-solutions/rapport/
- IDEXX Pet Health Network Pro, www.idexx.com/en/veterinary/software-services/cornerstone-software/pet-health-network-pro/
- VitusVet, http://content.vitusvet.com/request-a-demo-of-the-vitusvet-vet-app-csvets
- Zipwhip, https://www.zipwhip.com/blog/special-20-off-for-veterinarians/

Save digital photos to patients' electronic medical records. Take dental photos during each preventive exam, which gives you pictures to compare the progression of dental disease over time.

Bossy Bob

Because 95% of people consider pets to be family members, emotions may escalate when their pets are sick or injured.[6] A Petplan study of insurance claims found $1,500 is the average cost of emergency care. The top emergency care situations were cruciate injuries (average of $3,480), foreign body ingestion (average of $1,755) and cancer (average of $2,033).[7]

Bossy Bob brings his dog, Bojangles, to your hospital because he won't eat and has had diarrhea for several days. Through bloodshot eyes, Bob explains he's been up most of the night cleaning up after the dog. You examine the dog and feel several hard spots in Bojangles' belly. You tell Bob that you need to take x-rays and explains the fees. He agrees to the x-rays and waits for the results. You show Bob the x-rays and point out seven baby pacifiers. You explain the pacifiers will need to be surgically removed. Bob asks, "Can we just take Bojangles home and see if he will poop them out?" You review the x-rays again

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with Bob, explaining the objects are too large to pass. Surgery is necessary. You tell Bob you'll prepare a treatment plan that explains the surgical services and fees. After presenting a treatment plan and stressing the urgency of surgery, Bob says he can't afford it on top of expenses from the new baby. He loses control and shouts "If I can't pay, you're just going to let my pet die?"

When clients become irrational, help them refocus. You both want the same result: Get Bojangles the surgery he needs. Show empathy and provide financial solutions. Your hospital should accept every payment method possible: cash, checks, all credit cards, debit cards and third-party financing.

If financing isn't available, 43% of pet owners would decline procedures due to cost.[8] If a client says, "I can't afford treatment," the first no is not the final no. Acknowledge pet owners' concerns, and then share financial solutions. Say, *"I understand you're concerned about the cost of your pet's emergency surgery, which is $1,500. We offer ____, a payment plan for approved clients that has six months of deferred interest. Would $250 per month fit your budget?"* Show clients how to apply.

Here are third-party providers who provide financing for veterinary clients:

- CareCredit, www.carecredit.com/practices/veterinary/
- Extend Credit Financing, www.extendcredit.com/veterinary/
- PaymentBanc Financing, www.paymentbanc.com
- Scratch Pay, https://scratchpay.com
- Vet Billing, www.vetbilling.com
- Wells Fargo Health Advantage, https://retailservices.wellsfargo.com/wfha_veterinarians.html

Internet Irene

Internet Irene arrives for her dog's sick-patient exam. Bubbles has had vomiting and diarrhea for three days. She's been feeding Bubbles boiled chicken and cottage cheese to entice him to eat. Irene asks the veterinarian if he can prescribe medication to make the vomiting and diarrhea stop. "I'm sure it's just stress. My son is visiting us this week with his wife and three kids. My grandson chases Bubbles non-stop. I know it is just Bubbles' nerves acting up. I Googled it. We'd just like a prescription, please."

More than 75% of pet owners use the Internet to access pet health information before they pick up the phone to make veterinary appointments.[9] Acknowledge the pet owner's effort, and then provide solutions. A pet owner is genuinely concerned if she has gone to the Internet to look for help.

Say, *"I appreciate your concern about your pet's symptoms and your interest in searching online for information. Vomiting and diarrhea can have many causes, including certain foods, anxiety, toxic substances, viruses, parasites, intestinal obstruction and more. To get an accurate diagnosis, I will ask you questions about your pet's symptoms and perform a nose-to-tail exam. We may need to take x-rays or perform blood work. Then I will talk with you about the diagnosis and treatment choices. We both want an accurate diagnosis of your pet's condition. You did the right thing by bringing your pet to our hospital today."*

Start with a statement of appreciation rather than starting an argument. Explaining the reasons behind history taking, a comprehensive exam and diagnostics shows you're committed to finding answers. Saying "We both want an accurate diagnosis" makes the client your partner in delivering healthcare. Compliment her decision to seek professional advice.

Because Dr. Google is here to stay, your team needs to take proactive approaches:

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Provide trusted links. Share trusted links on your website, client handouts and social media. Acknowledge the pet owner's curiosity. Whether it's a simple ear infection or serious cancer, pet owners may confirm or seek more information online after you've explained your diagnoses. Openly share resources.

Say, *"I know you will have more questions about your cat's diagnosis of diabetes today. What questions may I answer about what we've discussed? I also will share handouts on diabetes with trusted websites where you will find accurate information. We will work together to manage your cat's diabetes. If you have questions about diabetes or what you find online, please call our hospital first. Here's my business card."*

List websites on client handouts. To brand every handout to your business, include your logo, phone number, website and email. Even if you use resources from veterinary companies, let pet owners know the information comes from you. On the bottom of each handout, put in big, bold type: For trusted sites on this topic, visit _____. Then list your website, Facebook page, YouTube channel, veterinary associations, colleges of veterinary medicine and others.

Here are favorite trusted websites for pet owners:

Topic	Organization	Website
Animal health, medications, therapies, surgery, behavior and safety	Veterinary Information Network (VIN)	www.veterinarypartner.com
Animal poison control	ASPCA	www.aspca.org/pet-care/animal-poison-control
Feline behavior	American Association of Feline Practitioners (AAFP)	www.catvets.com/cat-owners/behavior-and-care-tips/
Feline general health	Cornell Feline Health Center	www.vet.cornell.edu/fhc/Health_Information/topics.cfm
General health	Vetstreet	www.vetstreet.com
General health	IDEXX	www.pethealthnetwork.com
General health, behavior, diseases and conditions	AAHA	www.aaha.org/pet_owner/pet_health_library/default.aspx

Suspicious Suzie

Suspicious Suzie calls your hospital because she received an email from you that her dog, Daisy, is due for an annual checkup. She asks how much the visit will cost. The receptionist explains the exam, vaccines, heartworm/tick screen, intestinal parasite screen and preventatives along with the price. Suspicious Suzie says she saw an advertisement for a pet shot clinic, which offers $10 rabies and $20 distemper vaccines. "Why are your prices so high?" she challenges.

You need to retain clients and show value for your professional services. During preventive checkups, doctors often diagnose health problems such as dental disease, obesity, arthritis, kidney disease and other conditions. You don't want to miss an opportunity to see Daisy.

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Rather than talk down the vaccine clinic, talk up your protocols. If you offer preventive care plans or packages, monthly payments may entice her to continue to choose your hospital for preventive care. Download my proceedings on preventive care plans at www.csvets.com/AAHA/.

Be a patient advocate and explain all preventive care needed, not just "shots." Guide the client to make an appointment using the two-yes-options technique. Say, *"Our veterinarian will perform a nose-to-tail exam to make sure Daisy is healthy. The doctor will ask you questions about her lifestyle and activities, so he may choose only necessary vaccines. We use safe, guaranteed vaccines with the latest technology and research. We offer vaccines with one- or three-year protection, and some vaccines are combined to protect against multiple illnesses in one shot, which is more comfortable for your pet. Daisy also needs heartworm/tick and intestinal parasite tests. The total for her checkup will be $___. What questions may I answer about your dog's preventive care?"* <Client responds.> *"When would you like to schedule Daisy's appointment? We could see her at 9 a.m. Friday or 2 p.m. Monday. Which do you prefer?"*

Price-Match Paul

Price-Match Paul calls your hospital to ask if you'll match an Internet pharmacy's price for his dog's preventatives. Six months ago, he purchased flea/tick and heartworm preventatives from you but has been checking prices online.

Consumers are most likely to comparison shop for the three largest categories of pet medications: flea/tick and heartworm preventatives and non-steroidal anti-inflammatory drugs (NSAIDs).[10] Just as you price spays and neuters competitively, take the same approach with shopped medications. According to the *AAHA Veterinary Fee Reference*, 10th edition, the average markup for heartworm preventatives is 76% while flea/tick products are marked up 65%.[11] If you just double the price from your distributor to set your retail price, you've led clients to price-shop. The *AAHA Veterinary Fee Reference* doesn't list an average markup for NSAIDs but gives an average markup of 113% on all prescription medication.[11]

Focus on a combination of strategies:

Check competitors' prices monthly. Monitor retail prices of flea/tick and heartworm preventatives and NSAIDs you carry. Your hospital manager can check Internet pharmacy prices and use *Today's Veterinary Business'* retail price index at http://todaysveterinarybusiness.com/resources/retail-pricing-index/, which lists all flea/tick, heartworm and pain drugs by brand and size.

Send medication refill reminders. Just as remind for exams, vaccines and diagnostics, notify clients when medications need to be refilled. Use text and email reminders to save postcard postage.

Ask questions to help shoppers compare apples to apples. Gather information from the pet owner:

- What brand, size and quantity did you find online?
- What is the price?
- How much is shipping?
- Does the Internet pharmacy offer you a money-back guarantee if the product doesn't work?
- Let me calculate the cost per dose for you and tell you our prices.

Promote rebates and free doses. These deals are exclusive to veterinary hospitals. A "buy 6, get 2 free" promotion may make your price for 8 doses cheaper or competitive with an Internet pharmacy's six pack. Some manufactures offer greater savings when pet owners purchase 12 doses or a combination of flea/tick and heartworm preventatives. Many NSAIDs also have rebate rewards programs.

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If an online pharmacy offers a six pack of flea/tick control for a 40-pound dog for $72 with free shipping, the cost per dose is $12. If your price is $90 but the six pack includes two free doses for a total of eight, the cost per dose at your clinic is $11.25. You're cheaper!

Say, *"At $72 for six doses with free shipping, the Internet pharmacy's cost per dose is $12. When you buy six doses from us, you will get two free for $90, so our cost per dose is less at $11.25. We guarantee our products and have an online store with free shipping. Shall I refill <pet name>'s flea and tick preventatives for you to pick up today, or do you want to place an online order at <your website>? I can walk you through placing your first online order now. We appreciate your business and decision to protect your pet from fleas and ticks."*

Have an online store. Price may not be the only reason Price-Match Paul is shopping online. He loves home delivery. Work with distributor partners to set up an online store with auto-ship capabilities. Some programs also let you ship single doses of preventative each month.

Before matching the Internet pharmacy's price, Gary Glassman, CPA, of Burzenski & Company in East Haven, Connecticut, advises asking yourself five questions:[12]

1. Who are you price matching (Internet, big box stores, retailer)?
2. How much will you need to cut your price?
3. How much will price matching increase your sales?
4. How will lowering the price impact your bottom line?
5. What does price matching do for client loyalty?

Expletive Ed

Expletive Ed arrives to pick up his cat from a dental procedure. Dental x-rays revealed the cat had two resorptive lesions and the teeth were extracted. During the procedure, the veterinarian called Ed to explain the additional dental work and cost of care. Ed gave his verbal approval over the phone. After meeting with the nurse to review dental x-rays and discharge instructions, Ed goes to the front desk to pay. "I can't believe you jacked up the price of my cat's dental procedure. Your prices are #$@&%*! outrageous," Ed shouts at the receptionist. If you let his cursing offend you, you've lost your objectivity and control, and he's won. What he's really telling you is that he's upset.

If you're sitting at the front desk and Ed is standing, his body language dominates you and puts him in control. Stand up and get eye-to-eye so you're both on equal ground. Step out from behind the counter, which is a physical barrier between you and Ed.

An angry client loves an audience. Direct Expletive Ed to an exam room where you may have a private conversation. If all exam rooms are occupied, use the doctors' office, manager's office or employee break room. Your body language will lead Ed to follow you. Respond with a positive statement such as, *"I understand you're upset about this situation. Let's step into an exam room so you may have my complete attention and we can find a solution together."* Walk and talk, opening the exam room door and motion with your hand to lead him inside.

Once you're in the exam room, maintain eye contact and positive body language. Don't cross your arms. Stand up straight or lean in towards the client, which shows you're confident. Leaning forward indicates you're eager to help and focused exclusively on him. Don't stand face-to-face or talk across the exam table, which puts a physical barrier between you and the client and could be perceived as confrontational body language. Instead, stand at the end of the exam table, forming L-shaped body language between you and the client. Maintain eye contact. Don't respond too quickly and let him voice all of his concerns.

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Say, *"Tell me your concerns about your cat's dental procedure."* To demonstrate you're listening, nod and take notes while the client speaks, noting his key concerns.

Ed says he is concerned about the additional cost of extractions. Revisit the steps you took to diagnose the problem and seek the pet owner's consent before care was delivered. Reply, *"I understand you did not anticipate that your cat would need to have teeth extracted. Once your cat was anesthetized, the doctor performed a complete oral exam, and the nurse took dental x-rays. The exam and x-rays revealed that your cat had two resorptive lesions. Dr. <Name> called you during your cat's procedure to explain the resorptive lesions, which are painful. Dental extraction is the best treatment. After Dr. <Name> explained the diagnosis and cost, you gave him permission to extract the two teeth. <Nurse name> showed you the resorptive lesions on your cat's dental x-rays during the discharge appointment. You made the right decision in agreeing to the extractions. What questions can I answer about the care your cat received?"*

If the client care coordinator is unable to answer medical questions, say, *"Let me have a nurse answer your questions about the medical care your cat received."*

To proactively prevent client complaints, use these strategies:

When the patient is admitted, have the client sign a consent for additional dental services if needed. You'll get signatures on the treatment plan, anesthesia consent form and additional dental services form. This consent form explains that once the pet is under anesthesia, the doctor will perform a comprehensive oral exam and x-rays will be taken. Findings may reveal additional dental work. Always call the client to explain the diagnosis and get consent over the phone. If you are unable to reach the pet owner, this consent form has the client's decision to proceed with all necessary procedures, decline unforeseen dental procedures or approves up to a specific dollar amount of additional care. My *Veterinary Practice Management Resource Book & CD* has a Consent for Additional Dental Services Form (http://shop.csvets.com/books-and-videos/the-veterinary-practice-management-resource-book-cd/).

Document the verbal consent. If you get consent over the phone, have a second employee join the call as a witness. Note the client's decision in the medical record. After discussing treatment and fees, tell the client, *"I'm going to ask <nurse name> to briefly join us on the call to confirm that you agree to the additional treatment."* If your hospital records calls, this also legally documents clients' decisions.

Email the updated treatment plan. Tell the client, *"I will have my nurse email you the updated treatment plan that you agreed to while I begin the extractions. If you have questions before we see you for the 4 p.m. discharge appointment, please call and ask for me or my nurse, <employee name>."*

Discharge first, pay last. When the client arrives to pick up his pet, escort him into an exam room where he will meet with a doctor or nurse to review the dental procedure, see x-rays and discuss medication and home-care instructions. Clients need to understand all of the care that was delivered before they see invoices. Remember, clients also received treatment plans before admission that explained services and fees. When they understand services first, pet owners will have better perception of value for your professional fees.

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Which goals will you implement from today's training?

1. _____

2. _____

3. _____

Helpful resources	Link
Article: 5 Statements That Irritate Your Clients	www.csvets.com/userfiles/5%20statements%20that%20secretly%20irritate%20clients.pdf
Article: Are You Confident or Fearful When You Talk to Clients About Money?	www.csvets.com/news/downloads/20035.pdf
Article: How Should You Respond to Crazy Clients?	www.csvets.com/news/downloads/20046.pdf
Article: Stop Clients' Bad Habits of Emergency Refills	www.csvets.com/news/downloads/20058.pdf
Book: *Veterinary Practice Management Resource Book & CD*	http://shop.csvets.com/books-and-videos/the-veterinary-practice-management-resource-book-cd/
Video: Get the #$@&%*! Off Your Phone	www.youtube.com/watch?v=zcyfu0g2hNo
Video: Take dental pictures with your smart phone	www.youtube.com/watch?v=2BO51ZMuJaA
Video: Tame the challenging caller	www.youtube.com/watch?v=iTotEr8g2go
Videos: Communication Solutions for Veterinarians' YouTube channel	www.youtube.com/csvets
Webinar: 6 awkward client conversations: Respond like a pro	http://shop.csvets.com/communication-skills/6-awkward-client-conversations-respond-like-a-pro/
Webinar: How to deal with jerks	http://shop.csvets.com/communication-skills/how-to-deal-with-jerks/
Webinar: How to prevent client complaints and bad reviews	http://shop.csvets.com/communication-skills/how-to-prevent-client-complaints-and-bad-reviews/
Webinar: Managing bad clients	http://shop.csvets.com/communication-skills/managing-bad-clients-google-seekers-discount-divas-and-obnoxious-smartphone-users/

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