



Becoming More Confident about Money: Veterinary Receptionist Essentials Mini Series

Session 3: Increasing your Confidence in Money Matters

Alison Lambert BVSc MMRS MRCVS



3. Increasing your Confidence in Money Matters

Much of the daily content of a customer care role involves money - answering requests for prices on the phone, collecting payment from clients and promoting practice services. For many receptionists this is the area of the job where they feel least confident, largely because this is seemingly also the area to cause most client frustration or anger. Fortunately we can remove almost all the potential for difficulty by following some simple processes:

Price checkers

If someone calls asking how much your vaccinations are, they are actually after far more than just a figure. This is your opportunity to show them what else they get - demonstrating the love, care and expertise that only your practice can provide. Onswitch have developed a simple 5-step process that enhances the whole customer experience for both client and practice, thus significantly reducing the likelihood of any misunderstandings and frustrations as well as increasing the chance of converting a caller into a client:

1. Use your name
2. Use the pet / horse's name
3. Demonstrate love before price (answer the price question at the end)
4. Provide practice information
5. Always offer an appointment

The whole process can be completed in a couple of minutes and is certain to leave both sides feeling positively fluffy. Always make sure that you have a current price list near the phone - there's nothing more unprofessional than scrabbling around for bits of paper or asking a colleague for confirmation.

Up-selling

Many receptionists tell us that they feel uncomfortable 'pushing' products and services onto clients. Most of us recoil from the word 'sell', so let's simply change that word to 'educate'. If we educate our clients on the things that are best for their pet or horse, they are best placed to make an informed decision on whether or not to purchase it. And in the customer care team you will regularly be able to educate clients on a wide range of topics:

- Why vaccination is recommended, what your practice vaccination protocol is and which diseases are protected against.
- Why regular flea and worm treatment is recommended, which products are held in practice and why they are more effective than some cheaper products available elsewhere.
- Neutering procedure and why it is recommended.
- General advice; why an appointment is recommended.

Don't think of it as selling, rather than helping owners provide the best care for their animal. Recommending products that they will probably buy anyway provides another opportunity to demonstrate your expertise, and if they really aren't interested, then it goes without saying that you shouldn't push it.

Presenting invoices

As we've discussed previously, owners expect to have to pay for expertise and they want the best care for their beloved animals. When they are involved with discussions about the likely cost, are able to influence options chosen and are kept informed of any changes as and when they happen, there are unlikely to be any quibbles over the bill. Most problems arise when owners are presented with an invoice that is larger than they were expecting and which they don't understand. So here are a few tips to help things go smoothly:

- Always make sure that the account is fully itemised
- Provide written estimates at the start of treatment
- Obtain agreement for any changes as soon as the need for them becomes apparent
- Display prices clearly at reception and on your website

Sometimes, despite your best efforts, a client becomes angry or frustrated about costs, and this is where a process known as KLARDOC can be very useful in calming down a tricky situation:

Keep calm

Listen	Put assumptions aside and really hear what the client is telling you
Acknowledge	Repeat what you have just heard, for clarity
Refine and Define	Summarise the key facts, aside from the emotion
Overcome	Present possible solutions and alternatives
Close	Thank the client and detail the timings of any further action

Practice protocols

Make sure that you're familiar with the practice protocol for handling complaints and understand when to involve the practice manager or escalate things to partner level. If a client is becoming loud and disruptive at reception, keep calm and suggest moving to somewhere quieter. Document her concerns and agree what the next steps should be - don't make promises you can't deliver (for example, saying "I'm sure we can take some of these costs out for you") in order to calm her down, this will only make things worse in the long run.

Communicating effectively

Almost always, a 'difficult' conversation about money stems from the fact that your client is frustrated, confused, worried or distracted. Understanding her state of mind and looking at the situation from her perspective will usually help inform a solution, and it always helps to use calming, reassuring language:

- Don't use technical language or practice jargon.
- Keep your body language open and professional.
- Speak at the same pace as them.
- Repeat key words and phrases back to them.
- Use open questions to ascertain what the problem is.
- Ask politely for clarification of the issue, don't assume.

And finally, do consider undertaking a CPD day that offers interactive learning and practical tips to help you handle conversations about money more confidently - watching others and sharing their experiences is one of the best ways to learn new skills and build confidence.

Good luck!