# Consultation Skills for Veterinary Nurses Mini Series

## Session 2: The 7 Steps to Better Consults

**Alison Lambert BVSc MMRS MRCVS**

This webinar is the second in the series of three concerning the customer experience in the consult room:

1. Delivering a better consult room customer experience
2. The seven steps to excellent customer care in the consult room
3. Measuring and managing customer care in the consult room

**2. The seven steps to excellent customer care in the consult room**

You will remember that last time we looked at the Veterinary business model, with its five key stages to business success:

1. Make the phone ring
2. Convert the caller into a paying client
3. Convert the consultation into further treatment and care
4. Charge correctly and fairly for all work done
5. Get recommended (which in turn makes the phone ring...)

You'll also remember that we discussed how much the customer experience really matters to your business, at every point of interaction - owners assume high levels of clinical competence at every practice, so it is your customer care that actually sets you apart from your competitors.

**The seven steps to excellent customer care in the consult room**
This process has been created to help you approach the consult in a business-like manner, improving owner compliance and boosting recommendations. The seven steps have been adapted from the Calgary-Cambridge model, used for many years in human medicine:

1. Prepare yourself
    - Clear away all evidence of the previous consult
    - Check through the notes beforehand
    - Collect paperwork, equipment and medicines needed (vets and nurses leaving the room mid-consult is one of the biggest gripes from owners)
    - Make yourself presentable (wear uniform and a name badge)
    - Be on time!
2. Create rapport
    - Use the animal's name and talk to it as well as to the owner
    - Maintain regular eye contact
    - Position the table so that it is not a physical barrier between you and the owner (stand at the side), ensure that the computer can be accessed without turning your back to the client

3. Use open questions

    - "What can we do for Ben today?"

    - Let the client tell the whole story - don't assume or second guess

    - Establish a list of the owner's priorities (which may be different to yours)

4. Undertake a visible pet / horse examination

    - Your checks are obvious to you, but may be missed by the owner - make them more visible and narrate what you are doing and finding

    - Memorable and thorough exams will be talked about in clients' recommendations

5. Make recommendations

    - Be clear (Use the phrase 'I recommend' and not, 'let's see', 'I think' or 'perhaps we should')

    - Recommend what is best for the animal

6. Check understanding and signpost next steps

    - Confirm that you have met the owner's needs, according to their list of priorities which you established at the beginning

    - Involve the owner in this discussion - ask them to take notes and confirm their understanding of what happens next

7. Closing the consultation

    - Say goodbye to the owner and the animal

    - Be clear when you will see them again - book the next appointment in now

    - Follow-ups should account for 40% of our business - get them booked in before the owner forgets or goes elsewhere!

Once you have begun to follow the seven steps regularly, a number of obvious benefits will follow:

- Better operational efficiencies - consults are more focused and run to time

- Improved client compliance

- Recommendation rates go up

- Increased revenue - more clients visiting more often

Next time we'll explore the impact of the seven steps process in more detail, and look at how you can measure performance and set targets for further improvements.