



# **Essential Skills for Veterinary Receptionists Mini Series**

## **Session 2: Your Role in Practice Marketing and Client Engagement**

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This webinar is the second of three in a series on Understanding practice marketing and client engagement:

1. Understanding the role of marketing and why customer engagement really matters
- 2. Understanding your role in delivering the practice marketing**
3. Measuring the customer experience and marketing activity

## **2. Understanding your role in delivering the practice marketing**

In any business, there are four key areas driving business success:

- Finance
- Customer
- Operational effectiveness
- Team (i.e. you!)

Everything that happens in practice involves a person interacting with another person (often the client). In each of these interactions, it is important to deliver a consistently positive customer experience; not just through what you do or say, but crucially, in how you do it. You are the face and voice of the practice, how you represent it is central to the impression that the owner has of it.

Clear communication is vital. It begins with the practice vision and mission, so every role should have an agreed job description detailing how the responsibilities of the role help the practice achieve its wider objectives.

Do you have an agreed job description?

Do you have an annual appraisal? And is your performance measured against specific stated practice objectives? Because if you aren't clear on what your practice stands for, how can your clients be expected to be?

### **Communication routes**

Face-to-face communication is always best - it allows the nuances of expression and body language to magnify the bare content of a message. However, this isn't always possible, and so often you will send emails, leave voicemails and write letters in the course of the average day. Yet whilst these 'lean' communication routes may be quicker and easier, take care to avoid the message getting lost in a 'Chinese whispers' style along the way:

- The longer the chain of communication, the greater the distortion
- People can leave out detail which they think is unimportant
- A chain of communication is only as strong as the weakest link
- Feedback prevents distortion and clarifies that the message heard is the message sent

### **Team effectiveness and individual responsibility**

Every team has a number of players, each bringing particular skills and strengths. Each member of the team may be motivated by different things - some by success, some by praise, others by pay rises. A strong team is made up of highly motivated individuals who share a common goal and understand how their individual objectives feed into the team vision.

Inevitably there are a range of different personalities and communication styles within every team, and in building an effective team it's vital to consider what these are.

People are different. But they are also predictably different.

DISC profiling identifies where the natural styles and preferences of everyone in the team lie, categorising each according to their dominant style in various situations:

- How you respond to challenges
- How you influence others
- What is your preferred pace?
- How do you respond to rules and procedures?

Every individual has a natural preference:

- Some are TASK oriented (you see them checking their to do list first thing)
- Some are PEOPLE oriented (they are checking how everyone is first thing)
- Every individual is also either RESERVED or OUTGOING

No one style is better, just different. Yet with an understanding of how you and your colleagues naturally prefer to communicate, potential barriers and obstacles can be overcome so that the team works together and makes the best of every member.

### **Measure performance**

Onswitch Index data shows that measuring and monitoring call performance leads to a better customer experience and three times more appointments being offered.

Caller conversion is key, and the target for small animal practices should be to convert 40% of incoming calls into paid appointments.

A superior customer experience will be shaped by each of the nine stages of customer care:

1. Arrival. Walk the physical journey taken by a potential client yourself - how does your practice look and feel? Is it easy to park? Is there clear signage? Does it smell?!
2. Acknowledgment. Even if you are on the phone, smile and acknowledge a waiting client
3. Greeting. Make eye contact, use names, interact with the animal too
4. Assistance. Clarify what the owner is expecting to happen at this visit and manage expectations up front if required
5. Waiting. Monitor average waiting times and look at process changes if they are consistently high
6. Clinical clarity
7. Payment. Give clear explanations and break downs, keep owners informed as and when there are any changes to initial estimates
8. Rebook appointment. Don't 'wait and see', book a check-up now
9. Positive ending. First impressions count, last impressions endure

The customer experience is all, and you have a crucial role to play in defining this. As Maya Angelou famously commented:

*"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."*

Next time we'll conclude this mini-series by looking at how you can measure (and thus improve) both the customer experience and your practice's marketing activity.