

HAVE YOU CALLED YOUR PRACTICE RECENTLY?

Peter Weinstein, DVM, MBA

PeterWeinsteinDVMMBA@gmail.com

You have an ultrasound, digital radiography unit, endoscope, and the best computers money can buy. However, it is none of these that will determine the ultimate success of your practice. One of the oldest, most arcane, and least appreciated pieces of equipment that you have is your true money maker.

Alexander Graham Bell's invention from 1876 that, in the right hands, is your greatest source for profits OR your greatest cause for deficits. That instrument is the telephone.

IS YOUR PHONE AN ASSET OR A LIABILITY?

Of course, it isn't really the telephone itself that is the asset or liability, no more than any other piece of equipment. It is the person operating the phone that can do the most good or the most harm. Whether it is a client service specialist (CSS), a technician, groomer, or even a doctor, the manner in which a telephone conversation is handled is fundamental to your practice's success.

As an asset, the telephone and its associated handler:

- Brings new clients in the door
- Answers questions about the level of care provided
- Makes appointments for clients new and old
- Takes requests for food and prescription refills
- Advises about the status of pets
- Handles price shoppers' queries
- Provides piece of mind
- And a million other moments of truth.

As a liability, the telephone and its associated handler:

- Leaves callers on hold for indeterminate periods of time
- Provides a feeling of complete and utter disdain to the caller
- Creates confusion and uncertainty
- Doesn't really answer the question asked
- Turns off potential new clients
- Irritates existing clients with the lack of client service
- Provides distrust and loss of respect
- And a million other moments of failure.

HAVE YOU CALLED YOUR PRACTICE RECENTLY?

How do you really know how effective your telephone handling is unless you actually monitor how calls are being handled? As someone who calls dozens of practices each month, I can tell you that a very large portion of veterinary practices have significant challenges in the telephone arena. Some samples of recent vintage:

"Animal hospital" (That's it, just animal hospital)

“Can you hold or is this an emergency?” (Yes, no hospital name, no CSS name-and didn’t wait for a response)

“ABC Veterinary Medical Center. This is Kathy.” (Not bad)

“ABC Veterinary Medical Center. This is Kathy.”

Hi, this is Dr. Weinstein. I am returning a call from Dr. Smith.

What was your name again?

Dr. Weinstein from SCVMA

Ok, Mr. Weinstein, I’ll let him know you are on the phone”

And, after being on hold, “Yes”. That’s it. Just “Yes”.

Or, even worse, after being on hold, “Yes, Mrs. Smith, you can pick up that prescription”. But I’m not Mrs. Smith.

A TELEPHONE ANSWERING “SYSTEM”

For the telephone to be a useful tool, just like an ultrasound, there has to be user training. And like any other tool, there needs to be systems and processes and checklists to ensure that everybody handles the phone consistently. Probably the greatest question is:

“What do you envision the telephone client experience to look like?”

If you were to paint the optimal telephone conversation for the 20 most common reasons people call your practice, what would it look like? Start with some expectations, for example:

- The phone will be answered within three rings
- The person answering the phone will have a pen and paper or other means of taking notes during the call to minimize asking the caller to repeat themselves
- Each person answering the phone will say, “Thanks for calling ABC Animal Hospital, this is Meghan, how may I help you today?”
- The person answering the call has been trained in what to do for the 20 most common reasons for a call (and is not answering the phone ‘live’ until they have been tested in each of them).
- How to put people on hold.
- No caller will be put on hold for longer than 60 seconds

Obviously, your practice standards, expectations, and training will be specifically for your practice. However, if you don’t have a vision and scripts and a telephone system, each person answering the phone will be creating their own personal telephone system that leads to inconsistency and unpredictability for a client calling your practice.

A Telephone Answering System includes:

- Who answers the phone?
- How the phone is to be initially answered
- How each of the more common reasons for a call are to be handled
- A means of tracking the reasons for calls
- A standard methodology for taking messages and ensuring that they reach the right people
- How and What to do when you put someone on hold

- What to do when you pick up after someone is on hold
- A goal to solve the problem (make an appointment, fill an Rx, check on a pet's status, etc.) with one call by one person within a finite period of time

And all of this is written down, documented, and part of an ongoing training program for new hires and a refresher program for existing staff.

BUT, HOW DO I KNOW IF MY SYSTEM IS WORKING?

Call your practice!!

Hire a Mystery Caller to call your practice

Record your calls using any of a number of available systems. (Make sure you understand the legalities of this in your community.)

Listen in on calls (there are systems that allow you to do this surreptitiously).

If you don't monitor and measure you can't manage or mentor. Your telephone system should be created to make it easier for your telephone team. With a system in place, they have a predictable method to handle 80% of the reasons for ringing you up.

Your CSS team should be evaluated for how they are handling calls. Call length is a common measure of success in Call Centers. The shorter the call the more effective and efficient the problem was handled. I am not sure call length is a good measure in a veterinary practice that is trying to engage a client and build trust. On the other, lengthy calls that do not end up on some sort of action can be nothing but ineffective and inefficient.

You know your CSS team and phone system are working if:

- There are more appointments
- Messages are clear and end up with the correct person with the right number in a timely fashion
- The team is less stressed when the phone rings
- Clients are complimentary about your CSS when you survey them (you do survey them don't you?)
- Phone shoppers make appointments

Talking about phone shoppers, we all know that most phone shoppers are from local practices checking competitive prices in your community. If you can impress the phone shopper from other practices than you know you are doing a great job. And if you want to see how you stack up in your community, YOU be the phone shopper or mystery caller of local practices. You will either truly appreciate your practice or learn what you can do better.

BUT WHAT ABOUT...

Telephone Trees—at the end of the telephone tree will either be a person or the opportunity to leave a message. Can you make your phone tree so efficient that you don't have to listen through more than 4 choices? In my personal experience, anything more than 4 choices is almost impossible to remember. When you pick up the phone as an option on a phone tree, please recognize that the person on the phone has just gone through a very impersonal

experience and they are desperately looking for a warm, friendly voice. And, don't put somebody back into the tree.

Telephone Rooms---I love this idea. In the average practice, the CSS are expected to greet clients, check out clients, fill prescriptions, answer the phone, and the list goes on. Take the phone OUT of the reception area and let CSS focus on the people there and then. Identify your best phone person (or people) to handle the incoming calls and triage them in a room without distraction. Why do most people get put on hold? Somebody walks in; a client is being charged out; or the doctor needs the CSS to make somebody an appointment; another call comes in. Separate the phone from the reception area and you have focused phone people who are less likely to make mistakes.

HAVE YOU CALLED YOUR PRACTICE RECENTLY? PART 2

With a vision in place on how you want calls handled;

With a system in place on the specifics of how the calls are to be handled;

With a tracking program in place to see the effectiveness of the system;

What is the missing and most vital component? The people!!

You need to create specific expectations, a detailed job description, for anybody who is going to be a primary phone person. Hiring people who have telephone skills is NOT easy. In most practices, we hire jacks-of-all-trades with people skills, attention to detail, organized, focused. However, do we specifically look at their telephone skills? Do you check their resume' and references for heavy phone call handling? Hiring the right people to handle the calls in your practice is paramount!!

COVID CODICIL

Over the last year, veterinary practices have been totally disrupted and the telephone has become more and more taxed by calls, questions, concerns and needs. And the busy-ness of the phone has impacted the business of veterinary medicine. Clients put on hold indefinitely; clients lost in a phone tree trying to speak to a human being; ringing without answering, are among some of the issues that have become commonplace.

Take some time to retain your team on phone etiquette. Engage technical staff to handle more on the phones that might be clinically based. Think about outsourcing some lines if needed. Simplify your phone tree if you have phone. Add a simple phone tree if you don't.

The telephone is more important than ever to give clients peace of mind. For client retention, taking great care of your best clients, consider an A client hotline to access your team as a preferred client. For client acquisition, find ways to use your website, email, text, etc., to supplement conversations over the phone.

The virus has taught us the importance of the telephone. If you are still using the phone as you did a few years ago, your colleagues will be passing you by from a service standpoint. Thank differently, improvise, and find a way to make your practice more phone friendly.

SUMMARY

The telephone is a great piece of equipment; however, it is the people handling it that will determine whether it is an asset or liability. A practice that 'gives good telephone' will be differentiated in the marketplace and will be much more successful. Calling your practice will give you an idea of where you stand at the moment. Ultimately, you need a vision of how you want your phones to be handle. You need a system that provides a consistent client telephone experience. Tracking the call outcomes will help you learn how well you are doing. Mystery calling or recording calls is a great training tool for new hires as well as experienced staff.

Really, the bottom line to practice success is not having barriers to accessing the products and services that you have to offer. In my experience calling many, many practices, the telephone and the person handling the phone is a barrier. Tear down that barrier.

Call your practice. On the primary line. You will be amazed or dismayed. In any case, you will learn something.