

As a Customer Service Representative (CSR), some of your **primary responsibilities** are:

- Say yes to pets to support the growth of the practice
- Provide a warm, welcoming and engaging first impression
- Schedule appointments with the correct appointment type and provider
- Educating clients about their pets' health needs

Skills

- Communication skills must be exceptional; clear and confident dialogue not only conveys urgency and professionalism but also helps clients understand the importance of timely care for their pets.
- Empathy & patience
- Understanding the value of our service and the well-being of their pet

Why your role is crucial:

- Clients need us to be available during our hours of operation
- Missed calls are missed opportunity to help a patient
- Guiding clients to the appropriate appointment type and provider is key to growing our practices and ensuring pets receive the care they need in the time frame
- Padding the schedule with unnecessary hold times or tentative appointments can lead to a delay in treatment for the patient needing immediate or urgent care, longer wait times, and decreased client satisfaction.

General Tips:

- **Be efficient and engaging**
 - **Balance Connection and Efficiency:** While it's important to build rapport with clients, aim for a conversational style that allows you to connect without prolonging the call unnecessarily. Use open-ended questions to encourage dialogue but steer the conversation towards scheduling. For instance, "I'm glad you called! Let's make sure we get your pet the care they need. I have a 3:00pm today, does that work for you?"
 - **Active Listening:** Pay attention to the client's tone and needs. This will help you respond appropriately while keeping the conversation focused on scheduling. Acknowledge their concerns, then pivot to the appointment details.
- **Never assume things about a client like what they can/cannot afford**
 - **Avoid Financial Assumptions:** When discussing procedures, refrain from making assumptions about a client's financial situation. It is our job to educate the client on the service and it is up to the client to decide what they can or cannot afford. Be aware of the tone you use when answering financial questions – you may not realize that you are coming across as 'apologizing' for the price. Be confident!
- **Use your resources - don't forget about Wellness Plans!**
 - **Promote Wellness Plans:** Familiarize yourself with the wellness plans offered by your practice. These plans can make preventive care more affordable for clients and

encourage regular visits. When discussing options with clients, highlight how these plans can benefit their pets.

- **Educate Clients:** Explain the features of wellness plans, such as routine vaccinations, dental cleanings, and discounts on services. This not only helps clients save money but also promotes the overall health of their pets.
- **Be confident in your answers**
 - **Knowledge is Key:** Ensure you have a thorough understanding of common procedures, costs, and practice policies. This will help you provide accurate information confidently. If you're unsure about something, it's okay to say, "Let me check on that for you," but follow up promptly.
 - **Project Assurance:** Use confident language when discussing services and availability. Phrases like "We can definitely get you in on Thursday at 2 PM" project certainty and help instill trust in clients.
- **Don't ask a client if they want to schedule an appointment – offer them a time you can get them scheduled.**
 - **Make Clear Offers:** Instead of asking if they want to schedule an appointment, offer specific times that are available. For example, say, "I have an opening on Tuesday at 10am or Wednesday at 3pm. Which one works best for you?"
 - **Create Urgency and Importance:** Emphasize the importance of timely appointments for their pet's health. You might say, "Since your pet has been experiencing those symptoms, I recommend we get you in as soon as possible. I can book you for today at 1pm." Remember that you can offer drop off appointments which may work better for clients!

Client Scheduling Guidebook:

Remember to utilize the Client Scheduling Playbook to appropriately schedule your appointments. Some main points to remember:

- Clients expect you to be open and see appointments during your listed hospital hours.
- Vetstoria is an endless resource for both you and the clients.
 - Make sure your voicemail and website acknowledge Vetstoria as a fast way to schedule a non-urgent appointment.
 - Make sure All Day is clear as VetStoria and you have no saved appointment blocks or other blocks in your schedule as this indicates your day is full and clients will find a different practice that can accommodate them.
- Understanding how to fill the schedule:
 - Every appointment during a day should **not** be wellness. These should be spread out through the week to accommodate more urgent patients.
 - If a new client calls make it a priority to get them in same day
 - Know DVM surgery capacity and drop off capacity
 - If there is an open slot fill it!

Price Shoppers - Surgeries:

Don't treat price shoppers as a nuisance but an opportunity. They ask for prices because veterinary care is not a frequently purchased service, and our pricing is not readily available. Remember that it is our job to educate clients about *what* they will be purchasing, not just the price.

Do – Explain the services before the price.

"We have two options for a kitten spay. The first would be our surgery package which includes bloodwork prior to anesthesia to make sure your pet has no hidden abnormalities, anesthesia, the surgery, recovery time, and pain medication to go home. The doctor and technician may discuss additional options with you at the time of the surgery like a cone to go home. That cost is \$550 for the package. The other option with have is our Kitten Wellness Plan which actually includes that surgery package along with all of their wellness visits, vaccines, additional lab work like a fecal, and flea treatment. That is broken down into a monthly payment of \$75. When would you like to schedule your kittens spay? I can do Tuesday at 8am."

Do – Offer payment options that are available.

"We do accept CareCredit if you would like some more information on this!"

Don't – Only give the price with no value on the services you will be doing.

"Our spay package is \$350."

Offering clients information as to what they will be receiving will not only allow a client to be more informed on their decision, but also reduce the back and forth of questions that a client may ask after only getting a price.

Price Shoppers – Other Services:

Know your hospital policy on what you can price quote – IE exams, vaccines, surgeries, etc. When you do price quote, understand that clients will take that number as their absolute final price so be prepared to explain ALL costs associated with that they are asking for. If you are not able to give them a price for what they are asking for, offer them an appointment or an estimate.

Do – be transparent.

"We have the option to do a technician appointment for vaccines. The technician will do an exam on your pet and ask some history questions to ensure your pet is healthy. The cost for the technician exam is \$25 and the rabies vaccine is \$35."

Do – offer an estimate.

"Based on what you are asking for, it would be best if we create an estimate and send it over to you so you are able to see everything associate with that service."

Don't – exclude all the costs associate with their service like exam fees.

"Vaccines are \$35."

Pricing Objection

It is not an uncommon occurrence that a client will be surprised by a price since veterinary care is an uncommon fee that people incur. However, clients will complain most often if they don't understand why things cost a certain amount. If you are able to educate clients on your services and offer recommendations for financial support, you will reduce the amount of pricing complaints.

Do – Be empathetic and offer payment options.

"We understand that cost is a concern and recognize caring for your pet is a financial commitment. We do accept CareCredit if you would like to look up more information on that!"

Do – Explain your fees.

"For your pet's technician appointment, we have a trained team member do a physical evaluation on your pet and ask history questions to confirm your pet is healthy prior to giving any vaccines."

Don't – Diminish the value of your services.

"You're right – it is expensive here. If you go to the clinic down the street, they do it for less."

Diagnosing Over the Phone

Clients are used to human healthcare where they can call in and talk with an advice nurse instead of being seen physically. Unfortunately, our patients don't have the ability to talk with us directly which leads to pets having to be seen physically. We cannot diagnose anything appropriately over the phone and do need the doctor to make all diagnoses.

Do – Explain the need for proper medical care.

"Based on the symptoms you are describing, we need to see your pet in person for an exam. This allows our doctors to accurately diagnose and recommend the right treatment."

"I understand that your pet had a similar ear infection a couple months ago, but in order for us to give the proper medications to treat it we do need to see Fluffy for an exam with the doctor."

Don't – diagnose.

"I've seen this before and your pet is probably okay! Call us if he gets worse."

Slow to schedule

Sometimes clients are slow to commit to making an appointment for a myriad of reasons. They may not think their concerns are valid enough to make an appointment or they may simply not know when would work best for them.

Do – Highlight the importance of veterinary care.

"If you're concerned, we're concerned so I am glad you called! Let's get you scheduled with the doctor so they can discuss your concerns in detail and do a thorough exam to help getting Fluffy feeling better."

Understand their scheduling needs.

"I know you said you have a busy work week. We can schedule you first thing tomorrow at 8am or we can have you drop off Fluffy with us at 7:30 and we can contact you via phone to discuss Fluffy's care. Which would be a better option for you?"

"I understand if you're still unsure, but how about we schedule a quick appointment? You can always cancel or reschedule if needed, and I'd be happy to find a time that works best for you."

Don't – Leave it up to the client.

"Why don't you give us a call when you want to get something scheduled?"

The Talkative Client

We all have those clients that will start in one conversation and end 5 minutes later talking about something completely different. You can help guide them to where they need to be without being stuck on the phone for an exorbitant amount of time. Most of the time, these clients just want their concerns heard and addressed.

Do – Acknowledge and redirect to schedule

"Ms. Smith, it sounds like Fluffy is having some concerning symptoms recently. You're doing a great job on paying attention to his behavior and we're so glad you called. I'm making your concerns are document on his file. Based on what you've described, Dr. John would like to get Fluffy examined. We have today at 11am available. Let's get you scheduled!"

If they are still just wanting to chat, kindly mention that other patients need you.

"Ms. Smith, I'm so glad we were able to discuss your concerns with Fluffy today and we'll see you on Thursday. I do have another patient that is needing me right now. Is there anything else I can help with?"

Don't – Dismiss or ignore