



Creating the 5-Star Experience in the Exam Room

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Meet your consultant



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The exam room is your classroom. When you're an effective communicator, you can increase acceptance for professional services and products, boost client satisfaction and retention, and enjoy healthy revenue from better compliance.

What you'll learn:

- Taking a team approach to client communication because repetition gets results
- Using body language for collaborative communication that gets clients to YES
- Tailoring your approach to generations from Millennials to Baby Boomers
- Positioning your veterinary team as trusted advisors, reducing the threat of Dr. Google
- Asking history questions that provide insightful information
- Overcoming the barrier of medical jargon, using easy-to-understand terms
- Managing your doctor and technician exam time for productivity
- Educating clients with exam report cards, handouts and YouTube videos
- Following up with calls and emails after visits to check on patient care at home and to ensure clients will return

Taking a team approach to client communication because repetition gets results

Consumer decisions depend on multiple factors: price, need vs. want, competition, reputation, familiarity, and more. Marketing research suggests people need at least three "touches" to get to yes.¹ When guiding pet owners' decisions, repetition of the message can get results. Your entire veterinary team needs to educate clients and encourage compliance. Clients may ask different questions and have different comfort levels with receptionists, technicians and veterinarians. Consistent messages from your team can get results. Compliance improved as exposure to pet owner education increased, according to the 2009 American Animal Hospital (AAHA) Follow-Up Compliance Study.²

Know which messages you will share with clients BEFORE exams begin. Review the electronic medical record or paper chart so you can communicate the game plan for today's visit. Here are three touch points for a preventive checkup and how each team member could influence compliance:

TOUCH 1: Receptionist

Set expectations when clients arrive for appointments. Greet clients and patients by name to personalize the service experience. During check-in at the front desk, briefly explain the plan for today's visit, ask



about medication or diet refills, provide brochures on topics that will be discussed (i.e. senior screen, kitten preventive care plan, etc.) and show you're organized and prepared.

The receptionist would say, *"Good morning, <client name> and <pet name>. Thank you for visiting for <pet name's> senior pet checkup. I see that <pet name> needs a refill on <food and/or preventatives>. We will have refills ready for you at checkout. Do you need any medications or food for your other pets while you're here today?"* After the client responds, add, *"Because <pet name> is a senior, the technician and doctor will talk with you about our early detection screen. Here is a brochure to read. The technician and doctor will discuss testing and answer your questions. I will let them know that you've arrived."*

TOUCH 2: Technician

When greeting clients in exam rooms, technicians or assistants should introduce themselves, shake hands and explain their role. Say, *"Good afternoon, I'm <technician name>, the technician who will assist Dr. <Name>. For your pet's checkup, we will do a nose-to-tail exam, vaccines, heartworm/tick screen, intestinal parasite screen and refill your preventatives. I will take a brief history, collect samples for testing and get your pet's vital signs. Then the doctor will begin the exam. Does your pet have any health or behavior concerns you want to discuss with the doctor?"*

Explaining your role at the start of the appointment puts you in the driver's seat. Some clients may mistake the technician for a doctor and begin a lengthy description of their pets' symptoms. If the client steers you off track with specifics, reclaim control of the conversation by saying, *"The doctor will need to hear those important details. Let me take a brief history, and then the doctor will join us."*

If you need to educate the client about additional testing such as a senior early detection screen, do it before the doctor arrives in the exam room. Besides echoing the message, educating the client now allows you to collect one blood sample for multiple tests (i.e. heartworm/tick and early detection screen).

Tell senior pet owners: *"Just like people, your dog's health will change as it ages. Let's see how old your dog is in people years."* Share an age analogy chart that compares human to pet ages. Download a dog chart at www.pethealthnetwork.com/dog-health/dog-checkups-preventive-care/how-old-your-dog-people-years and a cat comparison at www.pethealthnetwork.com/cat-health/cat-checkups-preventive-care/how-old-your-cat-people-years. *"Your 8-year-old Golden Retriever is 55 in human years. Because pets age faster than people, changes may happen quickly. Our senior early detection screen will identify changes early. Think of this screen as an internal physical exam that lets us see inside to check the health of organs. Our senior early detection screen is the most comprehensive and affordable. This includes your dog's annual heartworm/tick screen, intestinal parasite screen, thyroid function, and urinalysis to determine hydration and kidney function. I will collect blood and urine samples now, and you will have results during today's exam / tomorrow."* After educating the client, invite questions. Say, *"What questions can I answer about your dog's early detection screen?"* This phrasing is more effective than the yes-or-no choice of "Do you have any questions?"

Explain costs of tests upfront so pet owners don't get sticker shock at checkout or argue with receptionists over charges. Say, *"Our senior early detection screen is \$152, which includes the heartworm/tick screen, a value of \$58. Shall I collect your dog's blood sample, or do you want to*



talk more with the doctor?” The technician guided the pet owner to yes, avoiding a yes-or-no choice. When the client accepts testing, praise his decision because clients want to feel positive about their experiences at your hospital. Say, “You’ve made a great choice in doing early detection screening for <pet’s name>. I’m going to take your pet to the treatment area where a technician and I will collect samples and start the lab tests. We will have results during today’s exam.”

Never say, “I’m taking your pet in the back.” The client may worry about what will happen behind closed doors where he is not allowed. The phrase “treatment area” is more professional and accurately describes what occurs in the heart of your hospital. Describing that you’ll be working with another technician demonstrates teamwork.

If the client declines the early detection screen, reply, *“Before I collect the blood sample for the heartworm/tick test, let’s have the doctor perform an exam and answer questions you may have.”*

A complete blood count with 16 to 24 chemistries and a T₄ averages \$152, according to the AAHA Veterinary Fee Reference, 10th edition.³ A test for heartworms (occult/antigen) plus Lyme and E. Canis is \$58.34.³

TOUCH 3: Veterinarian

Because the doctor has a position of authority, initiate a handshake as a warm, welcoming gesture. Shake hands with new and existing clients. A handshake is the quickest, most effective way to establish rapport with another person. Research shows it takes three hours of continuous interaction to develop the same level of rapport that you get with a handshake.⁴ Offer a handshake regardless of whether the client is male or female. Most women say that when a man does not offer his hand, it makes her feel she is not respected or seen as an equal.⁴ Shake hands with everyone present—kids, spouses and friends. You need to earn the trust of everyone in the exam room.

As you enter the exam room, introduce yourself with direct eye contact, a smile and an outstretched hand. Entering with positive energy can set the mood.⁵ Dr. Nalini Ambady, a Harvard professor of social psychology, found that within 10 to 30 seconds of meeting someone, an individual has developed an impression of that person’s competence, confidence and enthusiasm.⁵ Having an outgoing “Let’s get started” attitude also could soften the impatience of a client who has been waiting longer than expected.

Tell a new client, *“Welcome to <Your Hospital Name>. I’m Dr. <Name>. Thank you for choosing our hospital for your new kitten. My technician shared your kitten’s adoption records with me. Let me ask you questions about your new kitten, and then I will perform a nose-to-tail exam and explain what I find and which services your kitten will need. Does your kitten have any health or behavior concerns that you want me to address today?”*

Tell a returning client, *“Hello, <client name> and <pet name>. Thank you for continuing to trust us with <pet name’s> medical care. My technician shared information on what you’ve discussed already, and I will ask questions to get a thorough understanding of your pet’s health. Then I will perform a nose-to-tail exam and explain what I find and which services your pet will need. Before we get started, does your pet have any health or behavior concerns that you want me to address today?”*

Taking a team approach helps you improve compliance. The 2003 AAHA Study, *The Path to High-Quality Care*, found client compliance is 50% with only the veterinarian in the exam room, while it is 80% with a doctor plus a staff member in the exam room.⁶ In addition to repetition of the message, the technician



holds the pet during the exam, letting the veterinarian and client have a focused conversation without the pet as a distraction. With the support of a trained set of hands in the exam room, the doctor can be a better communicator and the client can be a better listener.

During your initial greetings in exam rooms, engage clients in friendly talk. Veterinary medicine is a relationship business. Keep a client information sheet that is separate from the medical record with notes about children, interests, hobbies, favorite sports teams, vacations, family chronic health conditions and other details that will help you be a better friend and advisor. Two to three minutes spent creating rapport with clients has been shown to greatly increase client satisfaction and reduce the doctor's liability.⁵ Once you begin the nose-to-tail exam, verbalize every step, giving clients play-by-play descriptions as you cover each body system.

Using body language for collaborative communication that gets clients to YES

Nonverbal communication can have five times the effect of verbal communication on a person's understanding of a message, compared with spoken words.⁷ Nonverbal communications can convey acceptance, warmth, interest, love, respect and support, which helps you build rapport with pet owners. Nonverbal communication has four key aspects:⁷

1. Facial expressions

Reveals six primary emotions, including surprise, fear, anger, disgust, happiness and sadness.

2. Eye contact

Known as an attending skill, eye contact lets the other person know you are focused on understanding and ready to listen. Looking at the person indicates your desire to convey interest, empathy and warmth.

3. Posture and position movement

The way you sit or stand can signal your mood. A slumped posture can indicate boredom. A relaxed posture suggests a person is calm. A shifting posture may indicate discomfort. Whether you're sitting or standing, your upper body should be relaxed and leaning slightly towards the client. Maintain open position, avoiding crossing your arms.

4. Use of tone

A person's emotional state can directly influence the tone of voice. Fear, anger and grief are emotions conveyed through intonation and pitch of the voice. A warm voice can convey empathy and loud tones may be anxiety provoking, acting as a barrier to communication.

When presenting diagnoses, treatment plans or information

Don't stand behind the exam table and talk across it because this is a physical barrier between you and the client, blocking communication. When sharing written information such as treatment plans, medication instructions and handouts, position yourself shoulder-to-shoulder or L-shaped next to the client. This allows you to read information right-side up and point to key instructions. Use a highlighter to mark details that clients need to remember. They also may need to share details with family members who were not present for the veterinary visit.

Because position is important for effective communication, mirror the client's position. If she is standing, you should stand. If the client is sitting and you are standing, you are in a position of dominance. You want to be on equal footing when having a conversation. If the client is seated, sit in the chair next to her. If the space will be uncomfortably close, kneel next to the client.



When using electronic or paper medical records

To efficiently use exam time, you may be tempted to write or type while talking with clients. Don't. A British study of physicians found when they read patients records and listened at the same time, there were communication consequences including:⁵

- Patients withheld their initial replies from physicians until eye contact was made.
- Patients paused mid-sentence when physicians looked at notes and resumed the conversation when eye contact was regained.
- Patients used body movement to catch physicians' gazes if physicians were reading medical notes while patients were talking.
- Physicians frequently missed or forgot information provided by patients while they were reading their medical records.

Eye contact lets the client know the veterinarian is participating and listening. Without eye contact, pet owners make nonverbal efforts to encourage veterinarians to realign their gazes, which reduces the quality and quantity of information shared. The study of British physicians concluded that using records while patients are speaking is not efficient for the patient or physician.⁵ Patients gave information more slowly and less completely, and physicians did not hear all of the information provided. The study suggests strategies to balance hearing patients' stories with examining records:

- Postpone using records until patients have completed opening statements
- Wait for opportune moments before looking at notes
- Separate listening from note reading

To signal to clients when you need to consult notes, you might say, *"Thank you for describing the length and severity of your dog's seizure. Let me review when the last seizure occurred."* This lets the pet owner understand that you need to review information before restarting the conversation.

Here are my strategies to improve communication while using records during exams:

- Have a technician or assistant serve as a transcriptionist while you're communicating with the client. The veterinarian can review and confirm information was accurately captured at the end of the visit.
- Position computers or paper charts so clients can see you, avoiding turning your back to pet owners while writing or typing.
- Let clients know when to pause the conversation. This helps you separate client- and computer-focused stages of the visit. Say, *"Let me note those symptoms in your pet's medical record now. Then I'll share treatment choices with you."*
- Engage clients when using records. If you're sharing digital x-rays or dental photos, have clients look with you. Offer to email images or test results or share them in your website portal.
- Use the record as a prop, pointing to the screen or chart and saying, *"Your dog's last heartworm/tick screen was last year on Nov. 15, so the annual screening is due today."*
- Share that you're documenting agreed upon treatment plans and follow up. For example, print and review a dental treatment plan with the client. When she agrees to care, say, *"Let me have you sign the treatment plan to accept care. You'll also take home a copy today."* Then open the appointment schedule on the exam computer and say, *"Let's choose a date for the procedure. Dr. <Name> does dental procedures on Tuesdays and Thursdays. Which choice fits your schedule?"* After the client selects a day, set the admission appointment time.
- Write notes at the end of appointments. Be diligent about record keeping immediately after the visit. Don't wait until the end of the day when you won't remember details of 20 conversations.



Tailoring your approach to generations from Millennials to Baby Boomers

	Baby Boomers	Generation X	Millennials
Birth years ⁸	1946 to 1964	1965 to 1980	1981 to 1997
Age ⁸	51 to 69	35 to 50	18 to 34
# of U.S. population ⁸	74.9 million	65.8 million	75.4 million

Each generation has different preferences for client engagement based on their age and life experiences.⁹ The common thread throughout each generation is a trusted doctor-patient relationship, involvement in healthcare decision-making and high-quality, easy-to-understand health information from their doctors, preferably in digital format.¹⁰

Technology for every generation

Social media: Be active on social media, including YouTube, Facebook, Instagram and/or Snapchat.

Website: Have an inviting website with features such as an online store, requests for appointments and refills, social media links, blogs and patient portals.

Text messaging: Research shows 99% of texts are opened and 95% are read within 3 minutes. Because all generations use smartphones, consider texting services to:

- Send dosing reminders
- Text medication and diet refill reminders
- Send preventive reminders
- Confirm appointments and surgeries
- Share patient updates after procedures
- Invite clients to special events
- Introduce new products and specials
- Alert clients when you'll be closed. Whether it's a hurricane or blizzard, let clients know when your veterinary hospital will be closed due to unusual circumstances. Include the name, address and phone number of the emergency clinic where you refer patients.
- Provide pet health alerts (pet food recalls, Rabies outbreak in area)
- Share boarding and grooming photos
- Promote your referral thank-you program
- Feature new equipment and medical services
- Let clients know you're on the way. If you operate a mobile practice or offer at-home euthanasia or farm calls, let clients know when the doctor is in transit. Then the client is prepared for your arrival, from opening the farm gate for your truck to having six cats herded for their checkups.

Your practice-management software may have texting capabilities, or work with third-party providers such as Zipwhip that let you use your existing business phone number to have two-way text communication with clients (<http://blog.zipwhip.com/special-20-off-for-veterinarians>).

Millennials: Millennials want deep, genuine connections with their physicians. In a study of 3,000 millennials, 66% said verbal communication of specific recommendations would contribute to a good physician visit. Research shows 71% of Millennials want their physicians to adopt a mobile health application. Many also use wearable health monitors to track exercise, heart rate, calories and more.⁹

Veterinary approach to Millennials: Have a mobile App for your hospital that lets clients view reminders, medical records, request appointments and refills, and upload pets' photos. Talk with your practice-management software vendor or third-party providers such as PetDesk (www.petdesk.com) or Happy Vet (www.intouchvet.com/happyvet/).



Generation X: This is the first generation of healthcare consumers. This age group shops for healthcare like they shop for retail goods and services. Gen-Xers seek information online, including ratings and review sites. They are influenced by healthcare providers' reputations and experiences and will switch providers based on recent experiences.¹⁰

Veterinary approach to Generation X: Invest in reputation-management services through your practice-management software company or third-party providers such as Review Retrievers (www.reviewretrievers.com), InTouch Practice Communications (www.intouchvet.com/veterinary-marketing/reputation-management/), Vetstreet (www.vetstreetpro.com), AVImark Rapport (www.avimark.net/practice-solutions/rapport/), IDEXX Pet Health Network Pro (www.pethealthnetworkpro.com) and Demand Force (www.demandforce.com/industries/veterinary/). Conduct surveys after visits so you can encourage 5-star reviews and intercept negative feedback before it becomes a 1-star review. Many reputation services include survey offerings.

Baby Boomers: As Baby Boomers age, they have more health concerns and chronic illnesses. Among Baby Boomers, 39% visit physicians three to six times per year, while 22% visit seven or more times each year. This generation tends to be curious, asking questions of healthcare providers and then researching topics further online. Patients are interested in high-quality, individualized healthcare. They are comfortable using their smartphones to get on patient portals or using computers.⁹

Veterinary approach to Baby Boomers: Offer printed and electronic handouts that are branded to your hospital and include links to trusted websites. Baby Boomers are likely to search online after their visit. Say, *"I know you will have more questions about your cat's diagnosis of diabetes today. I'm sending you home with (or emailing) handouts that you can share with family. Each handout lists trusted websites where you can find accurate information. We are going to work together to make sure that your cat enjoys the longest quality of life with this condition. If you have questions about diabetes or what you find online, please always call our hospital first. Here's my business card."*

Share trusted links on your website, client handouts and social media. Use big, bold type or a box at the bottom of handouts labeled "TRUSTED LINKS." Veterinary Information Network offers free handouts written by veterinarians (www.veterinarypartner.com). Direct clients to veterinary organizations, colleges and research groups. Your hospital's website and YouTube channel can take center stage. For example, your handout on how to brush a pet's teeth should include a link to your YouTube video featuring your technician demonstrating brushing techniques.

Here are favorite trusted websites to share with pet owners:

Topic	Organization	Website
Animal health, medications, therapies, surgery, behavior and safety	Veterinary Information Network (VIN)	www.veterinarypartner.com
Animal poison control	ASPCA	www.asPCA.org/pet-care/animal-poison-control
Feline behavior	American Association of Feline Practitioners (AAFP)	www.catvets.com/cat-owners/behavior-and-care-tips/
Feline general health	Cornell Feline Health Center	www.vet.cornell.edu/fhc/Health_Information/topics.cfm
General health	Vetstreet	www.vetstreet.com



General health	IDEXX	www.pethealthnetwork.com
General health, behavior, diseases and conditions	AAHA	www.aaaha.org/pet_owner/pet_health_library/default.aspx

Use a variety of teaching tools

In addition to generational preferences, people have different learning styles.⁵ Use models, websites, dry-erase boards, x-rays, handouts, exam report cards, and videos as teaching tools.

- **65% are visual learners.** They comprehend best when shown an image, model or graphic that demonstrates the problem or treatment. Visual learners may take notes, snap photos or videos with their smartphones, or draw a picture to understand a concept.
- **20% to 25% are auditory learners.** They learn information from lecture or discussion. This statistic is important because if you use words alone, you may not be communicating with 75% of your audience.
- **10% to 15% are tactical learners.** As “doers” they must perform tasks before they understand them. Use interactive lessons when showing clients how to clean ears, trim nails, administer subcutaneous fluids, and give medications.

Send home exam report cards (printed or electronic) that summarize today’s visit and when the next care is due. Half of the family may not be present for the visit. The exam report card allows the client to accurately communicate highlights of the visit. Your practice-management software may have exam report cards templates, or get forms from AAHA (www.aaaha.org) and Communication Solutions for Veterinarians (<http://shop.csvets.com/books-and-videos/the-veterinary-practice-management-resource-book-cd/>).

Positioning your veterinary team as trusted advisors, reducing the threat of Dr. Google

More than 75% of pet owners use the Internet to access pet health information before they pick up the telephone to make a veterinary appointment.¹¹ Pet owners type in symptoms, receive information within seconds, decide on a diagnosis and choose home remedies. Dr. Google also may join you in the exam room when a client pulls out his smartphone and searches while you explain his pet’s condition. In a survey of 225 Veterinary Hospital Managers Association (VHMA) members, 67% reported that clients use the Internet to treat, diagnose or find out more about a pet’s health.¹²

Dr. Google is here to stay. Acknowledge the pet owner’s effort, and then provide solutions. A pet owner is genuinely concerned if he has gone to the Internet to look for help. Say, *“I appreciate your concern about your pet’s symptoms and your interest in searching online for information. Many diseases can have similar symptoms. To get the complete picture, I’m going to ask you questions about your pet’s symptoms and perform a nose-to-tail exam. I may need to take x-rays / do blood work as an ‘internal physical exam.’ Then I will share my diagnosis and expertise as a doctor of veterinary medicine. We both want to have an accurate diagnosis of your pet’s condition, so we may choose appropriate treatment. You took the right step by bringing your pet to our hospital today.”*

Start with appreciation and empathy rather than starting an argument. Explaining the reasons behind history taking, a comprehensive exam and diagnostics shows that you’re committed to finding solutions. Compare diagnostics to the “internal physical exam” and as professional services that can only be delivered at a veterinary hospital. Saying “We both want to have an accurate diagnosis” makes the client your partner in delivering healthcare. Compliment his decision to seek professional advice.



Asking history questions that provide insightful information

Just as a physician would start with “Where does it hurt?” open with broad questions that let veterinary clients share information and help you build trusting rapport. Make the client feel he is an important part of the information-gathering process. Don’t jump to questions in the interest of efficiency. First, encourage clients to tell stories of problems from when they started to the present in their own words.¹³ Say, “Start at the beginning and take me through what has been happening...” or “Tell me how he has been doing since the surgery last week...” Just listen and maintain eye contact.

Use open-ended questions and listen attentively, allowing clients to complete statements without interruption. Ask clarifying questions when clients’ statements are vague, or you need more details. For example, “*Could you explain why you think your dog is in pain?*” Periodically summarize what clients have said to confirm your understanding and invite further information.

After the opening statement from the client, begin an interactive discussion with focused history questions. Developing templates of history questions has multiple benefits:

- Let you lead conversations
- Ensures consistency—whether clients are talking with an experienced employee or a new hire
- Improves use of exam time
- Focuses chatty clients
- Prevents you from skipping important questions when you’re in a hurry

Create questionnaires for preventive checkups for puppies, kittens and adult and senior pets. When taking a history, ask about diet, lifestyle, elimination habits, activity level, home dental care, behavior concerns and the use of flea, tick and heartworm preventatives. Here are examples of adult pet preventive care questions:

Discussion area	History question
General	Have you noticed any lumps, bumps, growths, non-healing sores or swellings? Have you noticed any coughing, sneezing or difficulty breathing? Has your pet been vomiting? Does your pet have any ear problems (head shaking, scratching, sensitivity, odor, discharge)? Have you noticed any excessive itching or scratching?
Behavior	Has there been any change in your pet’s behavior? Does your pet show signs of aggression to people or other pets? Does your pet show any destructive behaviors (scratching, chewing objects)? Feline Does your cat urinate or defecate outside of the box? Does your cat spray?
Environment	Canine Do you take your dog to a groomer, dog park, boarding facility or stores where it could have contact with other dogs? Is there wildlife in your area (mice, squirrels, birds, possums, raccoons or skunks)? Does your dog come into contact with other pets or their environments? Does your dog have an opportunity to drink from standing water outdoors (ponds, puddles)? Does your dog sleep with you or your children?

	Feline When was the last time your cat went outside? Does your cat live in a multi-cat household? Has your cat ever fought with other cats?
Elimination habits	Have you noticed any changes in bowel movements (consistency or frequency)? Have you noticed increased drinking or urination? Does your pet strain to urinate, take a long time to urinate or have accidents in home? Does your pet leak urine?
Nutrition and weight management	What diet do you feed your pet? (Brand, amount, wet/dry) How big is the cup? What treats / table food do you give your pet? Have you noticed any changes in your pet's weight?
Activity level	Describe what your pet does daily. What activities do you do with your pet for exercise?
Oral health	What dental care do you provide at home? When eating, does your pet drop its food, chew on one side or eat more slowly? Have you noticed bad breath, drooling or sores in your pet's mouth?
Parasite control	Which flea/tick and heartworm preventative do you use? When did you give the last dose? Do you travel with your dog to areas where ticks or mosquitoes may be present? Have you ever found a tick on your dog or on any other pet or person in your home?
Preventive screening	When was the last time your cat was tested for feline leukemia and FIV? Discuss need for preventive blood work and urinalysis.

Once you've designed preventive questions, develop questions for vomiting, diarrhea, lameness, skin conditions, allergies and other common reasons for visits. Doctors and technicians can work together to format the wording and order of history questions. Taking a team approach ensures buy-in and ongoing usage. Use templates in electronic medical records or laminated sheets with dry-erase markers.

Overcoming the barrier of medical jargon, using easy-to-understand terms

To be a good veterinary team, you need to be good teachers. You serve as translators so pet owners can understand complex medical information and make informed decisions. Here are veterinary terms that need word makeovers to increase client understanding:

Communication obstacles	Clear communication
Renal disease	Kidney disease
Electrocardiogram	Heart monitor
Fecal examination	Intestinal parasite screen
T4	Thyroid test
Osteoarthritis	Arthritis
Dental prophylaxis	Dental treatment
Wellness test or abbreviated lab (CBC, 4DX)	Preventive or early detection screen
Radiographs	X-rays
Lyme, Ehrlichiosis and anaplasmosis	Tick-borne disease
Estimate	Treatment plan



Drop off	Surgical or day admission
Recheck	Medical progress exam

Managing doctor and technician exam time for productivity

Here is an example of the exam flow for a 20-minute preventive care exam with an adult pet age 1 to 6:

Length of time	Task
5 minutes	Technician greets client Explains services that will be delivered today Takes a brief history Gets patient's weight, pulse, temperature and respiration Collects samples for testing
10 minutes	Veterinarian greets client Takes history Performs exam Explains exam findings, including dental disease, arthritis or other health concerns Vaccinates patient Explains test results Answers clients' questions
5 minutes	Gives client preventative and/or medication refills Technician presents treatment plan if needed (i.e. dentistry) Answers clients' questions, including medication questions Option to schedule procedure, book next appointment and collect payment if you have computers in exam rooms

Every practice team feels they are short staffed. Measure your staff-to-doctor ratio. You may discover that you're not using your team in the right places. A small animal practice typically has a 4.7 to 1 staff-to-doctor ratio.¹⁴ This may include 2 technicians, 1 veterinary assistant, 1 receptionist and 0.7 managers.

Follow up with calls and emails after visits to check on home care and ensure clients will return

Every patient visit needs a follow-up call, including preventive checkups, sick visits and hospitalized cases. Use staff ID codes in your practice-management software so the person who delivered the care is the same employee who does the follow-up call. If you leave a voicemail message, follow up with a brief email summary. In your voicemail, tell the client, *"I also emailed this information to you at..."*

Preventive checkup callback: Receptionists or technicians can call clients the day after preventive checkups. This callback serves four purposes: 1) Confirms you answered all of the client's questions, 2) Ensures there were no vaccine reactions (uncommon but important to know), 3) Shows you value the client's loyalty and 4) Encourages visits to your website for dosing reminders and online orders, which increase compliance. Say, *"This is <your name> calling from <Your Veterinary Hospital>. We enjoyed seeing <pet name> yesterday for her preventive checkup. I'm calling to see how <pet name> is feeling and to make sure we answered all of your questions. If you have questions, please call us at 555-555-5555. Visit our website at www.yourwebsite.com to see <pet name>'s updated reminders, get dosing reminders and request refills or appointments. Thank you for the opportunity to care for <pet name>."*



Sick patient callback: You saw an outpatient appointment yesterday and diagnosed a dog's ear infection. During checkout, enter callbacks for Day 3 and Day 10 to ensure treatment is occurring at home and to schedule a progress exam if it is not made on the day of diagnosis. Have the same technician who assisted the doctor during the outpatient exam make the follow-up call. The client already has a relationship with this technician, who is familiar with details of the case and will efficiently use telephone time. The technician would say, *"Have you been able to clean your dog's ears daily and use the ointment? Has your dog stopped shaking his head?"* (Client responds yes.) *That means the medicine is starting to work. Be sure to finish the entire 10 days of treatment. Stopping treatment could cause the ear infection to return and worsen. Finishing treatment is just as important as when your physician has prescribed 10 days of antibiotics when you are sick. Sometimes people stop taking antibiotics when they feel better, but you really need the full 10 days of therapy. The same is true for ear infections in dogs."*

Hospitalized patient callback: Call clients the day after the patient has been discharged. Most questions or complications—the dog chewed off the bandage or seems painful—will likely happen within the first 24 hours. Based on the complexity of the case, have the technician or veterinarian who provided care make the follow-up phone call. If a progress exam is needed but wasn't scheduled at checkout, this callback also lets you secure the appointment. Say, *"This is <your name> from <Your Veterinary Hospital>. Dr. <Name> asked me to call you to see how Alex is feeling following his surgery. Is he taking the antibiotics and pain medicine? How is he feeling? How is his appetite? Dr. <Name> needs to see Alex for a medical progress exam next week. I have an appointment available at 2 p.m. Thursday or 9 a.m. Friday. Which works for you?"*

Which goals will you implement from today's training?

1. _____
2. _____
3. _____

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Helpful resources	Link
Article: 6 exam codes every practice needs	www.veterinarypracticenews.com/6-exam-codes-every-veterinary-practice-needs/
Article: Are you letting clients wiggle out of heartworm prevention?	www.csvets.com/news/downloads/20041.pdf
Article: Avoid wiggle words that kill dental compliance	www.csvets.com/news/downloads/20040.pdf
Article: How to discuss costs of preventive care with your veterinary clients	www.veterinarypracticenews.com/how-to-discuss-costs-of-peventive-care-with-your-veterinary-clients/
Article: Why you should dress professionally	www.veterinarypracticenews.com/Why-You-Should-Dress-Professionally/
Book: <i>101 Communication Skills for Veterinary Teams</i>	http://shop.csvets.com/books-and-videos/101-communication-skills-for-veterinary-teams/
Book: <i>Exam Room Communication for Veterinarians</i>	www.aaha.org
Book: <i>Handbook of Veterinary Communication Skills</i>	www.amazon.com
Book: <i>Skills for Communicating in Veterinary Medicine</i>	www.amazon.com
Book: <i>The Veterinary Practice Management Resource Book & CD</i> , which includes history questionnaires and exam report cards	http://shop.csvets.com/books-and-videos/the-veterinary-practice-management-resource-book-cd/
Video: 3 steps to great exam greetings	www.youtube.com/watch?v=MKIaV-kZZFs
Video: How technicians can start preventive exams	www.youtube.com/watch?v=i4RZA3avDw
Video: Importance of business cards for veterinary teams	www.youtube.com/watch?v=RcHCeGI4OT0
Video: Set expectations in the exam room	www.youtube.com/watch?v=XUUf9WMYrAo
Video: When clients consult Dr. Google	www.youtube.com/watch?v=cPKO5HrVpSA
Videos: Communication Solutions for Veterinarians' YouTube channel with video tips	www.youtube.com/csvets
Webinar: 6 awkward client conversations: Respond like a pro	http://shop.csvets.com/communication-skills/6-awkward-client-conversations-respond-like-a-pro/