

How to use Practice Management Software to Aid your Team with Client Communications

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How important is Client Communication? Let's examine the human medical field and malpractice claims described in the book "Blink" 2005 by author of the "The Tipping Point" Malcolm Gladwell. Being data oriented practitioners, we as a group, would expect that if you did a detailed analysis of medical records and procedures you would be able to identify which physicians would be sued at a higher rate? That is not really the case. It ends up that physicians that have better communication skills are not sued as often. He describes a case where a medical researcher recorded hundreds of conversations between a group of physicians and his/her patients. About half of the physicians had never been sued. The other group of physicians had been sued at least twice. The physicians that had never been sued spent three minutes or longer with each patient. and were more likely to orient the patients about the sequence of events. They allowed time for questions and provided a proper time slot for open questions from the patient. There was no difference in the content or quality of information provided to patients.

Use to Facilitate Communication

How can we use our practice management software to facilitate communication to ensure this kind of loyalty in our veterinary practices?

We can start at the appointment scheduler when the telephone is answered. In most practice management software, the preferred doctor is often a field available. If the receptionist answers the call with this information and stored personal information such as children's names or occupations the client would feel as if you know them out of hundreds of people that you speak with each day. Go over the scheduling but also reaffirm which veterinarian the client will be seeing and how long the appointment may take. Always ask if there are any other concerns that need to be addressed during the visit. This information can be passed forward into a Subjective portion of a SOAP or onto a printed check-in sheet for the attending veterinarian to review. The receptionist may also want to inform the client of reminders (dental cleaning, vaccinations) that are due that could be included during this same appointment.

Upon arrival at the clinic, the receptionist has another opportunity to again ask if there are other needs to add to the appointment. The receptionist may want to advise the client of any services that were discussed during the call that the client wanted to think about. This is an opportunity to increase

revenue and client satisfaction. Orient the client again to the procedures that will be accomplished and how long the procedures may take.

The receptionist or technician has the ability to reinforce the need for specific procedures. Discussing programs or special promotions at team meetings not only provides the proper information to give to your clients, but further educates your team. Use Integrated Client Education Handouts with your practice management software to discuss at a team meeting and play out scenarios. Everyone from the front office team to the kennel assistant must be educated to provide the client with the same information. Hearing the same information from several resources in your practice controls the information that your client receives. (How many times have you had a client bring in the ream of paper or notebook with data downloaded from the internet?) Learn to build trust and practice asking questions to reach the core issues. Focus on solutions rather than problems. The resulting benefits for your practice will be: enhanced communication, quicker problem resolution, and educated clients, all leading to better performance and higher productivity. Using software to record this information will be viewable on a whiteboard or appointment scheduler for the veterinarian to review upon entry into the exam room.

Most software has history templates available to ensure that open ended questions can be recorded either by the veterinarian or technician and then reviewed and expanded upon by the





veterinarian. You can also record when a client declines a service in the SOAP portion. This is very important when you consider the client that is unhappy about the services received.

I was recently in a clinic with a pet where neither the technician nor veterinarian introduced themselves. Always introduce yourself to a client. I contrast that visit with an emergency with a pet where each team member all along the way introduced themselves and continually oriented and provided navigation through an emergency situation. The veterinary care in each facility was very good but I left the second facility with a better feeling even with a very, very large bill for an emergency situation. Use the available software fields below to facilitate the communications process.

1. Log inbound and outbound phone calls about the patient.
2. Log inbound and outbound phone calls about the client account.
3. Record the notes taken at the time the appointment was made and added to patient history
4. Linking documents used in the maintenance for account records, including emails.
5. Scanning documents and images from referral practices, new clients and outsourced lab work.
6. Use Integrated Client Education Handouts with your practice management software.
7. Use automated follow ups linked to codes to call back clients about procedures.

Reminding Clients

Setting up reminders and/or follow-ups in the Code Maintenance section of your practice management software further enhances the productivity of your practice. The call a day or two after the pet has had a surgery or specific procedure by someone in the practice will further bond the client to your practice.

You may want to consider asking the client how they want to be reminded of future appointments – a postcard, by phone or by e-mail.

Reminder programs are built and designed to help drive continual recurring revenue. When business is slow, are you using your database to drive extra business to your door? Use the DVM Marketing and Data Query Module to search for patients that could use your services. Below is a short list of a hundred queries available in DVM Manager. Call your own software vendor to ask about pre-written queries available to use in your practice.

- A. Clients with transaction over an amount in a date range hospital
- B. Animals of a certain sex with birthdays in a date range that have not been charged a spay code
- C. Clients that have bought a minimum amount of an item over a date range
- D. Clients with animals that are not spayed or neutered by birthday and client status
- E. Daily totals for clients with a balance
- F. List of clients without recent activity by animal species
- G. All transactions within a period of time by client status grouped by doctor
- H. Patients that have not had a procedure in a date range by age
- I. Client list by breed and species, excluding inactive and deceased
- J. Clients with animals of a selected species born before a certain date
- K. Clients with animals of a certain species by last visit range

Questions? Call Technical Support - 800.827.2243. The Implementations Team is available to help with all of your Inventory and Practice Management Training needs. We have both onsite and phone training options available. Please call Craig Markus directly at 614.659.1666 for more information.