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Practice Management

How to Move Customer Service from 'Great' to 'Awesome': Where to start?

Author: JD Stowe DVM, Reprinted from *The Effective Hospital Manual*, Lifelearn 2009

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How many times have you said or felt, 'if I've told (him/her/them) once I've told them a thousand times'? How many times have you created a practice policy only to have a meeting, weeks later, covering the same issue? How many of you have purchased or created a Hospital Manual that sits on the shelf gathering dust or at best is only partially followed? The reason for these frustrations - traditional policy manuals don't work!



Businesses that have set policies by which the business and employees operate place their employees, and their businesses, in a position for failure. Whenever an employee must tell a customer that 'I'm very sorry but our policy on this

is...' they are preparing the client to find someone else to do business with. In other words, *rules drive customers away*. We set these rules in an attempt to minimize problems but they cause more problems because they constrain the ability of each and every employee to provide exceptional service - because they are not allowed to!

We must rewrite 'policy' manuals into 'principles' we live by. Policies are operational company rules. We might say to an employee 'you are empowered to do the right thing'

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customer interact.

'Principles are what you live by; policies are what you live with'

Jeffrey Gitomer

Policies tell employees what they can't do despite the fact they are written as the things they must do. There are at least two words we must eliminate in the daily lexicon and they are 'no' and 'policy'. If a customer hears someone tell them 'no' to anything they are put into an angry, or at least frustrated, frame of mind. We cannot build relationships with frustrated or angry people. If an employee says, 'sorry I can't do that, we have a policy here...' it's as good as saying, 'no, no, no, I am not here to help you because our system is designed to protect the business not to help you!'

As a consequence, a business that operates on policies may not be successful. A business that operates on principles enables its people to succeed - hence it is more likely that the business will succeed.

Policy Manuals or Hospital Manuals are ineffective. For one thing, after hours, weeks and months of work in compiling all of the policies that the practice espouses, the Manual is set on a shelf and rarely referred to again. For another, policies are constantly changing. At almost any staff meeting, a discussion relevant to one or more current policies results in a change. In many cases these changes in policy are only recorded in the meeting minutes, resulting in a conflict between the Manual and current practice rules.

In worst case scenarios, policies are not even in a Manual and there are not even minutes from meetings. So the policies and changes in policies are only in the minds of those who attended meetings - oblivious to those who didn't attend. Too often we hear the same issues arising at meetings for discussion and someone saying 'didn't we decide something about this a few weeks ago?'

The most important reason that Policy Manuals should be terminated however is not simply that we don't do a good enough job keeping them updated - or that we selectively ignore and adapt the ones we dislike and like accordingly - but that very few policies get implemented consistently by the entire health care team. There is usually someone, often a practice owner, who does not act according to policy. When this happens we undermine the entire purpose of having rules.

There is a way to achieve changes in the way we do things without writing a Manual on Policies. Effective change is achieved through two strategic processes: standards and

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principles.

Standards, Principles and Policies

For a business to be effective, it must have structure and focus. In the past, structure was provided by policies. I suggest that policies have not proven to be effective business tools. What are proving to be highly effective are standards and principles. Any business or organization can become extremely effective by building the structure of the business around strategic standards in the way things are done and strategic principles in why things are done that way. In other words, we replace restrictive rules with 'how and why we do what we do'. Another element of the formula for a successful enterprise is the 'what we do'.



Every person in your organization must be fully trained in exactly what you do as a service and as a business. They need not be educated to the level of expertise of the top professional in the organization, but they must be trained in at least

the fundamentals of the business. For these principles to work, any person on the team must be able to speak intelligently, confidently and readily with a client or potential client. Otherwise the credibility of your organization can be destroyed by lack of trust in your business through a poorly communicated interaction - anyone who is not trained has the potential to lose a client. Everyone who is fully trained has the potential to create a fiercely loyal client.

Standards

Standards are the way we do things - standard operating procedures. They are the habits we create to get things done. However, the way we do things cannot be called a standard unless what is done is done consistently by each and every person on the health care team. It is not uncommon for a practice with two or more veterinarians to have two very different 'practices' within the same facility and underlying practice name. This is due to inconsistencies in the way each veterinarian does things - from medical protocols to customer service. Whenever there are inconsistencies from owners and associates the tone for the health care team is set on 'inconsistent'. So a receptionist answers the phone his or her own way; a nurse prepares surgery packs his or her own way, virtually anything that is done is done differently to some degree. Many practices do not have Standard Operating Procedures. Instead, to remedy the problems that arise, they create Policies - that won't work.

A true standard is a sequence of events that creates new habits that are consistent from

person to person. The sequence is typically one that follows events from person to person. There are two major sequences in a companion animal hospital - the outpatient service sequence and the inpatient service sequence. When properly standardized, these two sequences can create an overwhelmingly more successful implementation of what we traditionally refer to as 'policies' to become in reality 'the way we do things.'

For example, in the outpatient service sequence we must define the process from the client's arrival with his or her pet to the time of departure. The sequence begins with the telephone call to make an appointment and may end with the telephone call a few days after the appointment to determine whether the client has any concerns or questions.

Between those critical moments are:

- The impression of the exterior of the building.
- The convenience of reaching the hospital and finding a place to park.
- The impression of the interior upon entering (smell, visuals).
- The impression of attitude and service upon entering.
- The impression of care of animals.
- The transparency of the handoff from reception to nurse and handoff from nurse to veterinarian.
- The comprehensiveness of the medical process by the nurse and veterinarian.
- The transparency of the handoff from veterinarian-nurse to reception and the effectiveness of closure.
- The last impressions of the visit are completed by the process of billing, help getting to the car and follow up.

Within this sequence of events are what used to be 'policies' but what should be 'the way things are done' to make this sequence a 'standard'.

One of the items in this sequence is the visual impression the client has upon entering the facility. One element that contributes to this visual impression is whether there is a staff uniform. When developing this standard sequence, a practice must ask the question: "what visual impression do we wish the client to have when they walk through the door?" For an individual practice, the sequence might demand that everyone be in a hospital uniform. If so, this must apply to *everyone*, including the practice owner.



This same process works as the team discusses the development of the practice standard for each and every step of the outpatient service sequence.

For example, what is the impression of the exterior? The practice might decide it must enlarge the parking area, invest in landscaping, etc., in order to achieve the level of standard that the business wishes to achieve. No standard that cannot be achieved should be included.

Principles

Principles are the only way to achieve the standards. Without principles to live and work by the Standards Manual can become no better than the Hospital/Policy Manual - just words on paper because everyone does things his or her own way. People resist rules but embrace principles. Wars and rebellions have been fought because of the weight of rules and the inspiration of principles. Humans need discipline but they will not accept it through force. We will learn self-discipline if we want something badly enough. And it is the force of wanting something that becomes a driving principle. In effect, this 'principle manual' is a principle in itself.

By saying that rules no longer apply and that our team will live and thrive through standards and principles we are creating a global principle of true democracy. A democracy needs a leader so the business owner must become the epitome of the principles that follow. A democracy demands that people treat one another with respect and caring - that there is no hierarchy and that everyone, even the leaders, is an equal. This global principle is the first step and must inevitably lead to embracing as many of the following principles as possible to truly succeed.

Policies

As shown, policies are rules that create boundaries. Unfortunately most rules are meant to be broken because for most rules there are always grey areas around the edges. For example, a practice might have rules for working hours with the expectation that employees will show up on time. Most practices break this rule and never adhere to it with the excuse that sick animals don't adhere to a schedule. Practices that adopt the principle of honoring the promise of a time we set for an appointment strive to honor that promise and end up being far more punctual. We can achieve an objective if we look at a better way to achieve it. Rules are disregarded while promises are respected.

To be fair and complete, there are policies that any business must set as guidelines such as employee policies on benefits, practice policies on discounts and safety guidelines to protect the facility and team members.

Training

As indicated, training is crucial to making these concepts work. Training is not just an

orientation exercise. It involves bringing the entire team onto the same page. This truly means the entire team from the top professionals to the support staff. Everyone must know as much as possible about what is done and why it is done that way. Training, in conjunction with the use of policies and standards is one of the best time management strategies the business can possibly have. Instead of an employee running around trying to find someone to answer a client's question, the employee can handle it, not with advice that a professional would give but typically by providing the client with a justification for making an appointment with the veterinarian.

"If you want to have a practice culture that is fulfilling, a journey that is always exciting, and a health care team that is always growing, then use this interactive and user-friendly manual (& CD)!"

JD (Jim) Stowe

The Effective Hospital Manual, Lifelearn 2009

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Lifelearn LIVE has an exciting lineup for this fall with the following brand NEW courses:

- Diagnosing & Treating Heart Disease, and Internal Medicine Round-Up
- OVC Update Series: Pain Management: How to understand, recognize, treat and stop pain
- A Day in the Life of a Veterinary Practitioner
- Blood Smear Evaluations
- Endocrinology: When Hormones Go Awry
- Ears lookin' atcha! All you need to know about diagnostic otology

In addition, the following courses are back by popular demand:

- Surgical Ophthalmology
- Cytology
- Basic & Intermediate Ultrasound
- Ultrasound Refresher Lab
- Cruciate Surgery
- Urinalysis
- Laser Surgery
- Flexible Endoscopy

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Diagnosing & Treating Heart Disease, and Internal Medicine Round-up

October 3-4, 2009, Calgary, AB

Presenter: Anthony Carr DVM DACVIM

In practice, physical exam, ECG and radiography combined with common sense are usually all that are needed to establish an appropriate treatment plan. Echocardiography will not be a major focus other than to point out when an echo would be nice, when it would be important or when it would be absolutely vital to manage a case appropriately. Current treatment recommendations for various forms of heart disease including congestive heart failure and arrhythmias will be discussed as well.

The internal medicine round-up will cover a potpourri of internal medicine problems. Focus will be on practical diagnosis and treatment of such conditions as chronic renal disease, IMHA, hyperadrenocorticism, and hyperthyroidism.

Registration Information

OVC Update Series

Pain Management: How to understand, recognize, treat and stop pain

October 3, 2009, Ontario Veterinary College, Guelph, ON

Presenters: OVC Faculty Members

Prevention and management of pain in veterinary patients occurs on a daily basis; this seminar is designed to follow the practitioner through a 'day of pain' that may occur in any veterinary practice. Each speaker will present many classes of analgesics and their application, in any patient with pain from any cause. The final 2 minutes of the last lecture will also include well-researched anxiolytics of potential value for consumption by the practitioner at the end of a 'day of pain' in veterinary practice.

- Pharmacologic Principles of Drug Use as they Apply to Pain
- Pre- and Intra-operative Analgesic Drug Protocols to Maximize Efficacy and Safety
- A Selection of Acute Surgical and Chronic Osteoarthritic Pain Management Strategies
- Managing Neuropathic, Traumatic, Surgical and Medical Pain

Registration Information

A Day in the Life of a Veterinary Practitioner



November 8, 2009, Calgary, AB

Presenter: Karol Mathews DVM DVSc DACVECC

Veterinarians see patients in trauma everyday. This course, with a case-based focus on the ABC's, will demonstrate some basic principles that will apply to all trauma patients. Fluid administration is the most common invasive procedure performed in veterinary patients; using information from the biochemical profile, the optimum, not just any, fluid can be selected. Case-based situations illustrate the importance of selection of appropriate fluid administration. Neuropathic pain, both acute and chronic, is common in veterinary patients, we just aren't always aware of it. How to find where, and how much, your patient hurts and how to treat them will be discussed.

For registration and course information,

please contact Anne Behnan abehnan@lifelearn.com, 1-800-375-7994, ext. 224.

Blood Smear Evaluations

November 15, 2009, Guelph, ON

Presenter: Pamela Baker BSc DVM

This session will focus on evaluation of peripheral blood smears, with an emphasis on identification of abnormalities. Topics that will be discussed include "basophil boot camp", and identification of precursors, toxic changes and common morphologic changes of erythrocytes. Clinical cases will be demonstrated by the instructor using high quality digital photomicrographs and participants will also evaluate samples using double-headed microscopes. In addition, proper smearing technique will be practiced, with discussion of selection of the best technique for abnormal samples.

Note: Participants should have at least a basic working knowledge of blood cell identification.

Registration Information

When Hormones Go Awry-

Update and Discussion on Small Animal Endocrinopathies

November 21, 2009, Guelph, ON

Presenters:

Darren Wood DVM DVSc Diplomate ACVP

Kristiina Ruotsalo DVM DVSc Diplomate ACVP

Focusing on laboratory testing of adrenal and thyroid diseases of dogs and cats, with lesser emphasis on endocrine pancreatic and parathyroid diseases, the session will cover a review of sample collection procedures and protocols, the advantages, limitations and controversies of available tests, research update, and an interactive discussion on evidence-based appropriate test selection and interpretive considerations.

Registration Information

Ears lookin' atcha!

All you need to know about diagnostic otology

November 22, 2009, Guelph, ON

Presenters:

Anthony Yu DVM MS DACVD

Stephen E. Waisglass DSc DVM MRCVS

A day-long seminar in which the morning lecture will focus on otitis externa including practice tips for otic evaluation techniques (otoscopy, cytology, culture) and practice tips for procedural otic techniques (Intralesional injections, myringotomy, video-otoscope/CO2 LASER procedures). This will be followed by a wet lab in the afternoon with stations that include otoscope vs video otoscope; cytology; ear flushing; myringotomy; intralesional injections and biopsies of the ear canal; and intral-aural CO2 laser surgery.

For registration and course information,

please contact Anne Behnan abehnan@lifelearn.com, 1-800-375-7994, ext. 224

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Lifelearn is Celebrating an Anniversary!

Lifelearn is celebrating its 15th Anniversary of producing quality veterinary education and reference materials! Over the years, Lifelearn has introduced interactive training on CD, practice website services, and electronic client educational articles, to name a few. And the journey continues with our recent evolution to online services such as **client education** and **e-learning**...*more to come*.

This summer also brings another milestone - Lifelearn's 1st year in its NEW facility.

Lifelearn's new home, situated still in Guelph, Ontario, has allowed Lifelearn much needed space as we have grown in staff and multi-media capabilities. While it was bittersweet to move off the Ontario Veterinary College campus, Lifelearn still maintains strong and active relationships with the college & staff, continuing to offer many Lifelearn LIVE courses on campus.

To share in this celebration, Lifelearn is bringing to you a special anniversary offer. On any new orders of \$200 or more of Lifelearn brand products (excluding monthly subscription fees, Live courses and other specials), placed over the phone with one of Lifelearn's sales associates - mention the promotions code '**15Anniversary**' - and receive \$50 off the order.

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