

Keeping Track of Personal Details for Better Client Communication

Article by Roxanne Hawn



Strategies for remembering who's who and what's what

I've been going to the same primary care practice for my own health about as long as I've been a client at the general veterinary practice I use for my two dogs. Without a doubt, our veterinary team does exponentially better at remembering me.

It's immensely frustrating that I'm treated like a new client at my physician's office every time I visit, including having to redo paperwork. In late 2017, a few weeks after a cancer scare, the physician's assistant walked into the exam room and introduced herself like we'd never met. We had met several times, in fact, and had even recently traded emails

and phone calls about the possible cancer thing. Not cool. Right?

Even if folks at the veterinary practice don't remember my name on the spot, they at least recognize my face. Clients want to feel like they matter. It greatly improves client experience and loyalty. Plus, having conversations that reflect a shared memory improves client communication because you're not constantly covering the same ground in your limited time together.

Even if you remember far more about the pets in your care than the people who bring them in, how can you remind yourself of critical details before you walk into an exam room or make a call about a case?

CONTINUED ON NEXT PAGE

Leverage your practice management software

Since each practice management software system is different, you may need help figuring out the best way to store client details you want to remember—or at least have an easy way to remind yourself on the fly. So, invite your software representative to show you where you can keep notes.

"Clients want to feel like they matter. It greatly improves client experience and loyalty."

For tracking purposes, these are examples of what you might consider:

- Adding notes into any surviving pets' files when another pet of the same owner's has died; that way, no one accidentally asks about the deceased pet as if he is still alive
- Jotting down private details as a reminder when there has been a divorce or death in the family
- Setting up flags or cross-checks so that reminder calls for routine care don't accidentally overlook that a particular patient has way bigger worries at the time
- Making note of clients who feed their pets raw diets
- Making note of families who frequently travel out of state with pets (which may increase certain risks for the animals)
- Nothing those clients who choose titer testing over automatic revaccination

There may even be ways to display how long someone has been a client of the practice or, perhaps, the client's lifetime financial value to the practice. These would be good facts to keep in mind during conversations.

A big key is having a grasp of the big picture of the pet as a patient. For example, I once received a voicemail reminder about a routine fecal test. I missed the call because I was picking up my geriatric dog from the ICU after several days for hemorrhagic gastroenteritis. Checking for fecal parasites was the least of my concerns for him because he was ancient and frail.

Using software to track and alert yourself of key details is probably the most organized and efficient option for reminders about client details. Honestly, it's a lot to remember, especially when you're already on information overload from daily life.

Use white boards

I asked my blog's readers for the kinds of details they wish veterinary teams remembered about them, and the recent death of a pet frequently came up. People want you to acknowledge these losses.

Not that you want to keep a running tally of death on a white board, but it may help prevent client communication gaffes if the entire team knows which patients have been recently lost. You may also want to make notes about new puppies, kittens and adoptions so that you can mention or ask about the new family members.

Do updates for each shift

Consider a few minutes of verbal rounds at the beginning of each shift to recap who you're seeing that day. It builds a sense of community, and it lets you make the most of staff members with exceptional memories for such details.

Plus, various team members may know certain clients and pets better than others, so even quick reminders like these are useful:

- Remember, Mrs. Smith lost her husband a month ago.
- Jax, the cocker, spent part of the holiday weekend at the ER clinic after eating grapes.
- Mr. Jones is bringing in some foster kittens today. Keep in mind he lost his old kitty, Marvin, just a few months ago. He told me on the phone that these kittens are keeping him afloat emotionally, right now.

"Remembering who's who and what's what gives you an edge."

- Our new client, Ms. Johnson, is coming in again today with her adopted puppy, Beaver. Don't forget Beaver is her first dog ever, so she always has a lot of questions.
- That funny pug, Apple, is on the schedule. Apple is a girl. Last time she was here, I goofed and called her a boy—#embarrassing.
- Frankie Moore is here for an elbow dysplasia recheck. It's his brother, Cyril, that survived distemper. Don't mix them up when you're talking to Mrs. Moore.

Post last-minute sticky notes

There's a chance a team member will learn something on the spot about a pet or client that the veterinarian needs to know before walking into the exam room. As a last-ditch effort, consider a sticky note on the staff-side of the door or chart.

Examples could be things such as:

- The client shows up completely bald due to chemo, and until then you had no idea about the cancer diagnosis.
- The client got in a minor car accident on the way to the appointment and is flustered.
- Daycare failed and the client has twin toddlers in tow.
- Mr. Kitty accidentally got outside and came home scratched up. His mom is beside herself.
- The puppy in this exam room chewed up his mom's smartphone. She is worried he swallowed part of the screen, but she is also pretty upset with him.

Use client details to support loyalty

In addition to being more efficient for conversations with clients, keeping track of certain details about clients and pets helps people feel more appreciated. Gratitude goes a long way toward encouraging loyalty.

Keeping clients over the long haul can make the difference between practices that grow and those that don't—especially in more competitive communities with a surplus of practices. Remembering who's who and what's what gives you an edge.

Also consider marketing research which says Millennial pet owners may be less loyal than past generations. Seemingly small slights or communication mistakes could drive younger clients away; however, this generation also simply seems more open to trying new products, services and providers.

Give them a reason to stay. It's a lot less expensive to keep the clients you have than to acquire new ones.



Roxanne Hawn is a professional writer and award-winning blogger based in the Rocky Mountains of Colorado. A former writer/editor for the American Animal Hospital Association and the American Humane Association, she has written about veterinary medicine and pet topics for nearly 20 years. Her work has also appeared in The New York Times, Reader's Digest, Natural Home, Bankrate.com, WebMD, The Bark, Modern Dog, and many high-profile outlets. Her first book is called *Heart Dog: Surviving the Loss of Your Canine Soul Mate*.