An Evaluation of Telephone Communication Skills of Veterinary Client Service Representatives

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One of the primary job duties for veterinary receptionists or client service representatives (CSRs) is telephone communication with pet owners. Given this fact, it is important to determine if veterinary CSRs have effective telephone skills that create positive impressions and help to attract clients to the practice. While there are generally accepted best practices for the telephone, research in veterinary medicine to evaluate CSRs for these skills is lacking.

The purpose of the study reported here was to evaluate the telephone communication skills of veterinary client service representatives and to assess levels of knowledge, ability to engage pet owners and attract new clients.

Methodology
The study design was a cross sectional survey. The survey sample was a stratified random sample of 84 small animal practices; 12 practices in each of 7 different metropolitan areas of Florida. A 20-question survey was developed to evaluate basic telephone skills, knowledge of services and products, interpersonal communication skills and ability to attract clients. An opening script was used identifying the caller as a new puppy owner seeking wellness information and the cost of these services. Each practice was called between 12:15 pm and 2 pm to avoid times of peak activity for veterinary practices. Calls were made between August and December, 2012. Survey results were tabulated and analyzed using both qualitative and quantitative methods to evaluate CSRs level of knowledge related to immunizations, preventive health and diet requirements, their ability to engage a potential client, and their effectiveness in attracting potential new clients. In addition, the following variables were introduced as control variables to determine if they had an impact on the proficiency of CSRs: practice size (based on the number of doctors), city, median income of the zip code of the practice, and the presence of a practice website - an indirect measure of whether a practice is progressive.

Summary of Results
Survey responses were used to generate scores for each practice in four areas: 1) basic phone skills related to the opening greeting and putting callers on hold; 2) basic knowledge of services and products recommended for wellness care of puppies; 3) interpersonal skills including whether the CSRs asked the caller’s name, the name of the puppy, voice tone and whether attempts were made to engage the caller rather than just quoting fees; and 4) ability to attract potential new clients including whether the CSR attempted to make an appointment and/or conveyed information about the hospital and it’s services to attract the caller.

Scores were the highest for the opening greeting. Most CSRs did clearly identify themselves, the name of the practice and use a common greeting such as “How can I help you?” The maximum possible score for this skill was 5; the mean score of all CSRs was 4.5 and the median was 5. Of the 84 survey calls, 28.4% were placed on hold and scored in 4 areas: 1) whether the caller was asked if they could hold; 2) length of time on hold; 3) whether the CSR apologized for the hold time; and 4) whether the CSR thanked the caller for holding. The median time on hold was 90 seconds and the mean time on hold of 109.47 seconds. The longest time on hold was 7 minutes.
Scores for basic knowledge of services and products were rated as below average, average and above average. Both mean and median scores for all CSRs were average. Overall, 22% of CSRs had a below average score and 18% of CSRs received an above average score. Below average scores resulted for receptionists who were indecisive, gave inconsistent or erroneous information or conveyed limited information about recommended services. Receptionists that scored above average gave accurate and specific details about recommended vaccines, the need for a fecal analysis, heartworm prevention and large breed puppy food.

The maximum possible score for interpersonal communication skills was 10; the mean score was 2.713 and the median was 3. Of the 6 survey questions used to create this score, CSRs performed best for voice tone with 41% of the CSRs scoring above average. CSRs were weakest in the area of engaging callers by making engaging comments with 82% scoring below average.

Scores for the ability of CSRs to attract new clients ranged from 2-10. The mean score was 3.19 and the median was 3. Only 23% of CSRs asked the caller to schedule an appointment and only 3% provided information about the practice to attract the caller.

Other Key Findings:
- 100% of the CSRs did NOT ask the caller’s name or the name of the puppy
- 93% of the CSRs quoted fees without attempting to engage the caller
- 69% of CSRs received below average scores in their ability to engage callers with questions
- Survey results were not affected by location of the practice, median income of the neighborhood in which the practice was located, size of the practice, or whether the practice had a website
- Scores for 8 corporate practices included in the study were consistent with the rest of the scores indicating that CSRs at corporate veterinary practices don’t have better telephone skills than CSRs employed by private practices

Conclusions
Communicating with pet owners on the phone is a primary job duty for veterinary receptionists yet this study reveals veterinary practice receptionists generally have low scores for their telephone skills. CSRs are not skilled in their ability to engage pet owners inquiring about services and fees. Moreover, less than 25% of CSRs attempt to schedule an appointment and overall, lack communication skills to convert callers to clients.

Telephone skills are considered to be a basic component of good customer service and an opportunity to create a positive first impression of the business. In veterinary medicine, receptionists are expected to engage in friendly communications with pet owners on the telephone, convey appropriate medical knowledge and book appointments. However, formal training in telephone skills is lacking in most veterinary practices. As a result, the level of competency for veterinary CSRs is variable and, in the present study, telephone skills were shown to be below average in assessments related to their interpersonal skills and ability to attract new clients. Gallup research has linked customer engagement to financial success for a business. It is reasonable to conclude that client engagement is tied to the success of veterinary practices. Poor telephone skills of CSRs can negatively affect the business success of veterinarians. This is particularly relevant given the 2011 Bayer veterinary care usage study findings that client visits and the number of new clients each month are declining and efforts need to be undertaken to better communicate the value of veterinary services to pet owners.

Anecdotal reports indicate veterinary CSRs have seen a significant increase in fee inquiry calls, which are often referred to as “phone shopper” calls. Receptionists routinely report they don’t like fielding these types of calls for the following reasons: 1) time constraints during busy times of the day; 2) lack of training about how to
convey the value of their services; 3) discomfort due to a lack of knowledge needed to answer pet owner questions; and 4) a perception that the caller isn’t a desirable client because it is assumed they have limited funds. In this study, it is plausible to suggest that CSRs perceived the caller to be a “phone shopper” since the opening statement included a desire to obtain fee information. However, the caller identified themself as a new puppy owner and asked the CSR two follow-up questions of “what diet should I feed my puppy” and “should she be on heartworm preventive”. While CSRs answered the caller’s questions, they generally failed to engage the pet owner or to differentiate their services with the goal of acquiring a new client for the practice.

This study indicates the need for better training programs for telephone communication skills of veterinary CSRs. With improved telephone skills, CSRs are likely to book more appointments and attract more pet owners to the practice. In addition, better telephone skills allow CSRs to enhance client engagement which helps to increase client loyalty. Practices that devote resources to training for telephone skills can maximize the opportunity to raise the level of client service and increase appointment bookings which can lead to greater revenues.

Meet Amanda

**Dr. Amanda Donnelly** is a second-generation veterinarian with a diverse background in small animal practice, emergency medicine, business management, industry, speaking and consulting. Dr. Donnelly’s focus is to work with veterinarians who want to grow their business and have their team look forward to coming to work every day. She combines her “in the trenches” practice experience and business expertise to help veterinarians communicate better with their teams and clients.

Dr. Donnelly is a graduate of the College of Veterinary Medicine at the University of Missouri, Columbia. She has an MBA from Baker University in Overland Park, Kansas and she also holds a certificate in Veterinary Practice Administration from the AAHA Veterinary Management Institute (VMI) at Purdue University. Dr. Donnelly is Past-President of VetPartners™, a national organization of consultants and advisors. She is the author of the book *101 Practice Management Questions Answered* available from AAHA.

A member of the National Speakers Association, Dr. Donnelly is a frequent speaker at national and international veterinary conferences. She was the Practice Management Speaker of the Year for the 2007 and 2013 NAVC.

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