




Front Office Management Simplified

Some tips



2 Corinthians 1:12

For our boast is this, the testimony of our conscience, that we behaved in the world with simplicity and godly sincerity, not by earthly wisdom but by the grace of God, and supremely so toward you.






Stress ==> Burnout

- ▶ Are you feeling burned out and emotionally exhausted? You are not alone.
- ▶ It is 9 a.m. on Monday morning and you just got to work. The schedule is completely booked, and clients keep calling to see if you can “squeeze them in” even though you don’t have any empty appointment slots until next week. The owner of the hospital keeps saying yes to everything, and you feel overwhelmed and defeated even though your shift just started.
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- ▶ Veterinary Practice New August 5, 2021



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Christian Veterinary Mission



Sharing the love of God through
veterinary medicine



Work-Life Balance

- *I try to achieve a work-life balance by being equally overwhelmed at home and work.*
 - *- Adam Burns, Man With A Plan*
- 



Telephone

This is the key to
practice development
and stress management


The telephone can be the
core driver of stress --

If you let it....



Courtesy Training


- No matter what is happening in the background the phone must be answered in a courteous manner
- Caller must perceive that they are calling a professional office not a fast food joint
- Try hard to remember names or use tricks to remember. Owners love their names and the names of their pets—use them often.



Script: (your office) then: My
name is Halla--
How may I serve (help) you?

It must be heartfelt?





The **number one job** of the front is to make appointments—every other task falls below that primary task

Answering medical questions is not the job of office staff....




Appointments

Taming the Beast




Appts with less insanity

- Stay on schedule
 - Same day call is an urgent care visit
 - Clients arrive 10 min early (just like MD's)
 - If client is late will need to reschedule or drop off with notes to staff.
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Divide your appointment times into three categories

- Prevention Care – and problem finding (technicians)
- Examinations (doctors) – non urgent illness or issues based on owner perceptions
- Urgent Care—owner directed or staff directed based on owner urgency (same day call—more expensive)



Examples of room rotation approach-- illness

- ▶ Tech 5 -10 minutes (Prior to Dr. –1 minute problem talk with Dr. then to next room. Minimize talk in waiting room
- ▶ Doctor 10 -20 minutes decide outpatient/inpatient moves to next room
- ▶ Discharge nurse 10 min – Rx and client education or to the next work zone (inpatient)—this nurse can be same person or have a “floater”
- ▶ Repeat
- ▶ Leave 30 minutes each am and pm for urgent care and catch up

Room 1	Staff	Room 2
8:00 New Client	Tech	Tech
8:10-30	Dr.	Dr.
8:30	Techs	Techs
8:40-9	Dr	Dr
9:00	Techs	Techs
9:10-30	Dr.	Dr.
9:30	Techs	
Room 1	Staff	
9:40-10	Dr.	Dr.
10:00	Techs	Techs
10:10-30	Dr.	Dr
Urgent	Dr.	Dr.
11:00	Techs	Techs
11:10-30	Dr.	Dr.
11:30 Urgent	Dr.	Dr.

Taming means Timing your appointment schedule

- Offer appointments at times that are helpful to the flow of work
- Do not say “ When would you like to come in.?”
- Say: We have a one o’clock open.
- They say: “When do you close.”
- You say: Our last appointment is at _____ .
- They say at or near closing: “Can I bring in _____ now?”
- You say: Everything is urgent care after our last appointment. Is this urgent?
Charge urgent care fee




Problems

- Drop offs: can you drop your child off at the pediatrician office?— unless vomiting diarrhea (isolation—take a deposit) make appointment
- Multiple dogs and cats plus multiple children – convenience to owner difficult to juggle. Schedule one at a time on different days. One sick animal at a time.



Mountains to climb

Pushbacks and problems to overcome



'Phone in' question:


Client asks about sickness or
medical question--

Staff knows the answer – can give an
answer

True or False



False – staff makes appointment. Also makes notations
on the chart or in computer.



Client phone concerns


New client or new issue

- ▶ Can I talk to the doctor? Yes during an appointment is the best time. Make appointment
- ▶ My dog is acting funny– client talks about it– big time waster. Always say yes we can help BUT Make _____!!!!
- ▶ We just got a kitten. I need to know XXXXXXXXXXXXXXX!
- ▶ You got the picture. Make an appointment!



Appointment push back:

- I can't come in right now—can I just ask her/him one question?
- **Answer:** Seeing your pet is essential so you get the best answers. When is a good time for you to come in?
- They can't process this question— next option
- Is this urgent? This is a yes or no question.
- If yes: fit them in and charge an urgent care fee.
- If no then make them an appoint that fits the practice needs.
- The goal is not to get the doctor involved over phone




Key point: The doctor cannot just answer phone questions

- ▶ Leave a note– give to someone in back to give to doctor to resolve when available
- ▶ Leaving a note means a chain of responsibility to that client
- ▶ This is one key to taming the chaos and unproductive nature of dealing with animals



The never ending phone conversation—up front

- Front desk: cannot talk on phone and check people in or out at the same time
- You say: Excuse me but I must attend a waiting client. When is a good time for me to call you back.
- Most can't give you a time – they will call back but don't offer this—first things first offer them an appointment.



How and when to go to the doctor

- ▶ How: If a Doctor has to call back give a note and a phone number with a problem summary. This is a two way communication. **Staff member to doctor** no passing off to someone else to tell doctor
- ▶ When: Client calls to give current status of a patient in progress at home. Give note.
- ▶ When: Client calls about hospitalized patient . Leave note and number and time to call.
- ▶ When: Client complaints
- ▶ How: Owner should be told that doctor or staff member will call back. This is a communication pathway responsibility issue. Key point: Owner must be available when called back– they are responsible for availability not doctor or staff




Who is the doctor?

- ▶ Training and experience lead some staff to overstep their medical authority. This is common in very small practices.
- ▶ The “buck stops” one place—the doctor in charge
- ▶ However, all doctors need to “train to restrain” that is the focus needs to be on moving the communication from the staff to the doctor authority (appointment).
- ▶ Most client questions and problems are unique (not cookie cutter)—**make appointments NOT distractions for the doctor.** This is a major time saver.



Helpful workflow ideas

- Track wait times—address problems—it could be doctor is distracted –client signs a time in sheet
 - Track work flow—where are the bottle necks
 - Don't keep people on hold longer than 1 minute
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Responding to vaccination and annual visits

- Owner calls in and says postcard, text or email etc says needs his “shots”-- the chances are the phone call is very often in response to a current problem and not vax or heartworm driven.
- Office Response: “Does the pet have anything else wrong or that you would like us to address?” If yes then is an exam appointment and routine care takes back burner. If no then make routine care appointment.
- Certified techs should be doing routine care.



Internal Staff Management

Keep a happy staff



Meetings- take time/make time


- ▶ Rounds in the am before clients
- ▶ Weekly staff meetings (Monthly for sure)--
- ▶ Ask how things can be done better
- ▶ Let staff run the weekly meetings
- ▶ Allow them all to participate and add meaningful dialog about problems to solve
- ▶ One on one – performance reviews– if you have a manager then they do this— otherwise practice owner


Pay

- ▶ Pay is generally related to either length of service or level of educational progress and training received through continuing education
- ▶ Must have job descriptions that describe the positions people are serving the practice
 - ▶ Front office staff
 - ▶ Managerial
 - ▶ Animal nursing
 - ▶ Certified Technicians
 - ▶ Assistants
 - ▶ Janitorial/Kennel
 - ▶ Keep your pay consistent by classification and length of service



Cross Training

- The nature of vet medicine requires people to cross train positions
 - Therefore part of each job description will include wording that indicates that cross training for other responsibilities is part of everyone's job description
 - No one should ever say: that is not in my job description.
 - Doctors should also clean up messes to encourage a full team attitude (horizontal team concept)
 - Doctors and staff need to take time to cross train during slow periods
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Staff Factions (opposing groups)

- Front office versus the back staff
- Old versus new staff
- Doctor vs Doctor
- Shift rivalries
- “Friends” against others
- This is discussed at every meeting that we (all) make up a team that works on behalf of the whole group and not individuals or cliques.



Conflict resolution

- Deal with it quickly.
 - Bring those in conflict to a meeting in private.
 - Bring a witness with you.
 - Let them talk it out
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Feed the flock



- Recognize employees regularly
- Provide food
- Annual performance reviews
- Take to meetings and events
- Provide professional apparel



Stay positive

- About clients: client bashing is a frequent “sport” in vet clinics.
 - Negative comments spoil everyone’s day
 - Gossip is toxic
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Thanks

God bless you and keep you.

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