



Leading an Effective Client Service/Training Meeting

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Spending Time Working “ON” the Practice Not “IN” the Practice

- Setting standards
- Creating core values
- Empowering the healthcare team
- Training the healthcare team
- Improving the efficiency in workflow

**“The E-Myth Revisited – Why Most Small Business Don’t Work
and What to Do About It”
Authored by Michael E. Gerber**



When To Train?

Meetings should
be conducted
weekly

Slowest day of the
week

Preferably
mornings or lunch



Does the Practice Stay Open?

The practice should be closed to clients

Post a sign in advance

Phones need to be turned over to the answering service

Client Service Meeting

We will be closed today from 8:00 to 11:00 conducting a training meeting in order to better serve our clients and patients. If this is a medical emergency, please call 123.4567

Thank you for your cooperation and understanding.

Who Attends the Meetings?

Everyone should attend the weekly meetings including:

Receptionists

Technicians

Vet Assistants

Managers

Doctors

Groomers

Kennel Attendants



Is Everybody on the Clock?

YES!



Rules of the Meeting ...

Meeting Do's

- Headline your thoughts
- Manage your listening
- Build on other's ideas
- Use the "how to" & "I wish I knew" phrase
- Stay in the process
- No idea is a bad idea
- Stay with the time allotted for each agenda item

Meeting Don'ts

- Look for the "fatal flaw"
- Lob "grenades"
- Ramble
- Persist on a hidden agenda
- Have more than one meeting at a time
- Miss time within the agenda items

Effective Facilitation ...

Facilitator must be assigned for every meeting:

Preferably not the owner of the practice

The facilitator initiates the agenda but doesn't necessarily run the entire meeting



Effective Follow Through ...

**Secretary must be assigned for
every meeting**

The Role of the Secretary:

Takes notes of the pertinent discussions and decisions

The purpose of having notes:

- Team members who are absent from the meeting are able to stay informed.
- It holds everyone accountable for implementation of decisions and/or new policies.
- A copy needs to be given to every team member in order for them to know the important issues that were discussed in the meeting.

Consistent Structure ...

Agenda Items Discussed Every Week

Housekeeping

Introduction of new team members

Obituaries

Client service share time

Client service training

Medical training



Housekeeping ...

Issues related to policy
and procedures

For Example:

Staff Schedules

Invoicing

Cleanliness of practice

Supplies

Filing System



Introduction of New Team Members

Every existing team member must introduce themselves

Tell the new employee their position

How long they have worked for the practice

What they think is unique about the practice



Obituaries ...

One team member is assigned to bring all of the charts and sympathy cards for the animals that died during the previous week

The doctor and healthcare team who were involved in the case discuss the medical issues regarding the cause of death or euthanasia and how the clients felt about the loss of their pet

All of the staff members have an opportunity to sign the sympathy card during the meeting.



Client Service Share Time ...

Each and every employee is asked to bring incidents of either good or bad client service from the previous week to the meeting

Client Service Share Time ...

As these incidents are shared:

We all learn how our clients are being treated

If the incident is a good one it reinforces the core values of client service then it is rewarded by public recognition among peers

If the incident is a bad one no repercussions are felt other than to learn how to prevent the incident in the future.

Positive steps are made to implement permanent changes that will prevent this from happening again.



Client Service Share Time ...

Staff members are taught how to listen to clients to gather important client information, and then they are taught how to act on that information to change

Client Service Training ...

One staff member is assigned every week to discuss with the team a topic related to client service

For Example:

Body Language

Handling Distraught Clients

How to Handle Phone Shoppers

How to Create value in wellness services

Have a library of Client service books as references for the team



Medical Training ...

One staff member or doctor is assigned every week to discuss with the team a topic related to veterinary medicine

Medical Training . . .

Teach topics common in the practice

Key Topics

Vaccines / Immunization

Nutrition / Diets

Parasites / Control

Heartworm Disease / Prevention

Fleas / Control

Dermatology

Ears / Teeth

Puppy / Kitten Care

Restraint

Medical Training . . .

Typewritten notes

With drawings

Explanation from doctor or key staff member

Reason for learning

How to market service or products

Testing

Multiple choice

Essay make-up tests

Raise when pass with 90% or above

Client Service and Medical Training . . .

Planned in advance for at least 6
months

May incorporate vendor seminars

Lastly ...

Make it FUN!



Thank You!

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