

# THE ART OF Veterinary PRACTICE Management



SECOND EDITION

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The best thing to have happened to me in the past eight years was to have met my partner and friend Sheila Grosdidier. I hired Sheila on a friend's recommendation, not really knowing anything about her other than what was on her resume. One person I asked about Sheila simply said, "If you have the opportunity to hire her, do it." Her interview was a little rocky, but I knew there was something special there. Listening to my inner self I hired Sheila and my world has never been the same since.

Sheila is in a word awesome. She is **THE** most amazing person I have ever known. Sheila is very smart. She knows so much about so many things, but it is more than being intellectually smart. Sheila has a sense about things. She understands people, she is kind and considerate, she has a greater sense of what is going on. She possesses a greater knowledge. She has what I call inner knowledge.

Sheila has inspired me to be a much better person than I ever was. She challenges me, intellectually stimulates me, provides me with an entirely new perspective, and sets the bar very high for both of us and our company. This can easily be evidenced by the fact that she received the honor of being named speaker of the year at NAVC for the third time, an honor no one else has ever achieved—and one that I was only able to obtain once. (But I do plan on breaking her record.)

Sheila became a partner in VMC in 2007, again one of the smartest things I have ever done. Having Sheila as a partner is simply amazing. I could not ask for a better partner. We challenge each other, complement each other, and really are so much better as a team than at least I know I would be individually. Sheila has taken VMC to a whole new level and dimension. The use of technology in our firm, the new and innovative ideas she has come up with—and continues to—keeps our firm at the top and continues to allow us to be considered the gold standard in veterinary practice management.

I am so honored that Sheila has agreed to co-author this book with me. It is our hope that this book will be used at all the veterinary schools to teach our new veterinarians veterinary practice management, that it will be used by all managers as a template for

## Acknowledgements

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effective management within their practice, and it will help practice owners to learn *The Art Of Veterinary Practice Management*. Sheila and I have one goal for this profession and that is to make a difference and to help veterinarians and veterinary practice managers and practice owners practice smarter, not harder. I dedicate this book to Sheila, for without her it would not have been written.

Mark Opperman, CVPM

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## Chapter 1

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# How Do Clients Perceive Your Value?

Patients can't go home and brag to their owners about the great care they received from you and your team members. Instead, clients determine your hospital's value based on what they experience during their first encounter with your practice.

It's important to note, however, that perception of value is rarely based on the quality of the medical care. A practice can leave clients with a negative impression but in fact provide excellent care. With no basis for assessing the practice's medical capabilities, clients form their impressions based on everything else, starting with the way you answer the phone. To bond clients to your practice never lose sight of the following:

**1. Internet rating sites.** Many clients may make a determination about your practice before they contact you! How, you ask? They are looking up reviews of your hospital on the Internet. Believe it or not, people read these reviews—and believe them. You need to be aware of reviews being posted on your practice. Place a Google alert on Google to help inform you when a review is posted. You may also use this media as a marketing tool and request those clients who make a positive comment about you or your practice to write an Internet review. This concept is known as dilution, so if you do have a bad review it will be diluted by all the positive reviews.

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**2. Initial client contact.** I've called veterinary hospitals before and heard someone say, "All Pet Clinic. Hold on, please," followed by a click and silence. What kind of message does that send? It sure doesn't tell them you're ready and willing to serve them. Your initial contact with clients, whether over the phone or in person, sets the tone of your relationships.

To get off to a good start, I recommend that receptionists answer the phone with, "Good morning. All Pet Clinic. This is Mary. How may I help you?" All four parts are equally important: the salutation, the name of your practice, the name of the person taking the call, and an offer to help. A fitting and complete ending for every call: "Thank you for calling All Pet Clinic. I'm glad we were able to serve you today."

When clients come through your front door, are they greeted immediately? Assign a receptionist the role of client greeter. This person will be responsible for knowing which clients are coming in which day and acknowledging them as soon as they walk in the door. In some practices, the greeter also sits down with new clients to help them complete the new client form, then gives them a hospital tour to show the excellent care their pets will receive. Studies indicate that the client-bonding rate improves significantly in hospitals with a client greeter.

It's just as important to acknowledge the pet. When clients arrive, the receptionist simply looks at the appointment book or medical record and says, "It's nice to see you, Mr. Jones. I see that Casey is here for his comprehensive physical exam and vaccination visit. Please have a seat and Cheryl, our exam-room assistant, will be right with you."

Don't forget that in the client's mind, there may be no greater sin than to call the pet a "he" when in fact it's really a "she," or vice versa. Avoid that mistake by making sure the sex of patient is entered into the computer. If you are using check in reports, have the receptionist highlight the sex of the patient in pink or blue to make it easy to identify the sex of the patient.

**3. Signage.** Take a look at your hospital sign. Does it look well-maintained? What feelings does it evoke? I've seen some practice signs that look more appropriate for a daycare center while others give the impression that the hospital went out of business years ago. The sign plays a critical role in clients' per-

ception of value, so it should reflect your practice's personality and professionalism. Chapter 5 features an in-depth discussion of this important marketing tool.

**4. Building exterior.** When you turn in to your parking lot, what do you see? Is the area well cared for—or is debris scattered about and piles of feces just waiting to be stepped on? Do you see attractive landscaping or clumps of weeds? Is the parking lot well-surfaced or full of potholes? Are parking lines visible or non-existent? Does the outside of your building say that you run a high-quality hospital?

**5. Reception area.** The term “waiting room” is not appropriate because no one in a veterinary hospital intends to make clients wait.

As you look around your reception area, assess the following:

- Is the client seating comfortable?
- Are the walls and floor clean?
- Can you smell unpleasant odors?
- Do you see peeling paint or torn wallpaper?
- Are any ceiling tiles cracked?
- Are informational posters and pictures professionally framed and hung on the walls?
- Are all display areas well-maintained and professional-looking?

The reception area brings up another question: How long do you typically keep clients waiting for their appointments? The most common reason clients leave one practice for another is a long wait. Studies show that you jeopardize your relationship with clients if you make them wait more than 15 minutes between the time of their scheduled appointment and the time they see the doctor. Of course, many factors play a role in client retention, including whether a long wait time occurs infrequently or often. Nevertheless, the 15-minute rule is a good guideline.

**6. Receptionist's work area.** Is the reception counter neat and professional-looking? A disorganized desk speaks volumes, so be sure to scrutinize the medical-record system, traffic flow around the reception counter, placement of phones and computer terminals, and the efficiency of work stations.

Do you know the one phrase spoken in veterinary hospitals worldwide? “I can't find the medical record!” Misplacing records is a

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common problem, but why tell the client about it? The pet owner's natural reaction will most certainly be, "If you misplaced my pet's medical record, what's going to happen when I leave my pet here? Will you misplace my pet, too?" Instead of admitting incompetence, just start a new record. When the original turns up, you can consolidate the two.

Better yet, get rid of those paper medical records and go paperless. Practices that have made this transition experience much greater efficiency and less frustration. When I lecture and ask a group of attendees how many have gone paperless, or paper light, a number of hands go up. I then ask how many would go back to a paper environment, do you know how many hands remain up? That's right—none! Doesn't that say something?

Now consider the role of your receptionist—in my opinion, the most important position in a veterinary hospital. To show you just how much influence a receptionist can wield, let me tell you about a personal experience several years ago. I had just moved to Indianapolis. Many of my clothes had gotten dirty and wrinkled during the move, so I took them to a nearby dry cleaners. When I picked up the laundry, I was less than impressed with the results. I returned a week later with another load of clothes, reasoning that because I didn't know any other cleaners in the area, I'd try my luck again.

When I walked in the door, the woman behind the counter astonished me by saying, "Good morning, Mr. Opperman." When I told her I was surprised she remembered my name, she said, "But of course I remember your name, and I also remember that you like your shirts done with light starch." The woman, who I learned was Doddie, was absolutely right. It impressed me so much that for the 10 years I lived in Indianapolis I took my clothes to that cleaners—and for 10 years they did less than an optimum job.

Why did I keep going there? Because of Doddie. She made everyone feel as if he or she were part of her family. It was always a joy to go to the cleaners and be greeted with such warmth. Doddie is my definition of a first-class receptionist.

**7. Team professionalism.** Your employees must be knowledgeable about the veterinary profession and the services your practice provides. They also must look professional, and that's why I'm a strong proponent of staff uniforms. You don't have to use

uniforms that employees in fast-food restaurants wear. Your staff could wear, say, matching polo shirts or striped shirts with navy or khaki pants. Many practices will get their uniforms from companies such as Lands' End or Eddie Bauer. Both of these companies offer corporate wear catalogs that have many styles to choose from.

Be creative and choose uniforms that reflect your practice's personality. One successful hospital's employees look professional wearing khaki slacks and a starched white shirt with the practice's logo embroidered on the pocket.

Whatever uniform you choose, it should include name tags for all staff members. It's also a good idea to include the name of your practice and hospital logo.

**8. Exam rooms.** Neat and odor-free exam rooms are a must. These rooms should be cleaned after every patient visit. Use a hand-held vacuum cleaner for hair and dust and a good odor-control agent. Visiting clients may notice a lot of things you don't want them to see—a puddle of urine in the corner, cobwebs on the ceiling, or posters taped to the wall—so sit in the client's chair and observe your surroundings.

Keep in mind that clients desire comfortable seating in the exam room and a hook for coats and purses. A stack of current magazines or pet-health brochures may reduce wait-time frustrations as well.

I recommend that your staff not take clients to the exam room until the doctor or assistant is ready to see them. Clients waiting in exam rooms perceive the wait to be longer than it actually is, perhaps because they feel they're in "solitary confinement." On the other hand, clients with a fractious pet may be more comfortable waiting in the exam room. Be attentive and responsive to each client's needs.

**9. Doctor appearance.** Clients won't be impressed seeing their doctor wearing a lab coat stained with urine or blood, so freshen up between appointments. One study indicates that clients consider male doctors to be most professional when they wear a clean white jacket and dress shirt. Dress pants and ties depend on the work environment. Clients prefer female doctors to wear a white jacket with a blouse and slacks or a long white lab coat with a dress or skirt.

For a professional appearance, the common denominator is the white coat. I suggest a white jacket with the name of the doctor

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embroidered on it and perhaps the hospital logo. Studies show that the doctor's per-client transaction and client-retention rate are significantly higher for veterinarians who wear a white lab coat and professional clothes compared to those who wear colorful lab jackets or don't wear a coat at all.

Pay attention to your body language around clients as well. Do you enter the exam room with a smile and greet both the client and pet? Do you explain what you're doing during the examination? Do you tell the client what needs to be done at the follow-up visit?

Here's a 10-point exam-room checklist for doctors:

- 1. Introduce yourself.** "Hello, I'm Dr. Smith."
- 2. Talk to and touch the pet.** "Hello there, Casey. I think you're happy to see me!"
- 3. Do something.** Conduct the exam or explain a procedure.
- 4. Say something.** Explain what you're doing during the exam.
- 5. Show something.** Point out the pet's tartar build-up or show ear mites under the microscope.
- 6. Give something.** Give the client a handout on heartworm disease or FeLV. Don't just hand over the bill!
- 7. Listen.** Then ask, "Do you have any questions or concerns?"
- 8. End on a positive note.** Reinforce the client's decision to accept your professional recommendations.
- 9. Client exit. Escort the client through the visit.** Team members can make a visit more pleasant by having the bill and medications ready to go. Time is even more precious after the visit because every minute the client has to wait will seem like three or four.
- 10. Finishing touches.** Do receptionists itemize the bill and go over it with the client before giving out the total? Does every client receive an itemized receipt? Does a staff member offer to help clients out to their cars? Attention to these details go far.

### IMPRESS CLIENTS WITH A SUPER OUTPATIENT VISIT

Now that you've critiqued your practice in these 10 areas, let's look at a real-world example. What would a super, value-building client visit look like? I believe great visits depend on the use of an exam-room assistant. An effective assistant can strengthen your clients' perception of value and increase a veterinarian's productivity by as

much as 75 percent. Just think of all the things a doctor does on a daily basis that could be done by a member of the support staff: run routine laboratory procedures, prepare prescriptions, clip up hot spots, or be one of the people responsible for client education.

Here's what a typical outpatient office visit looks like in a hospital that uses its healthcare team effectively:

**1.** Linda, the receptionist, pulls the records the night before or prints out the check-in reports before the client arrives. When Mr. Jones walks in the door with his dog, Casey, she greets them using the client's name and pet's name.

**2.** Linda notes in the record or on the check-in report the reason for Casey's visit, offers Mr. Jones a cup of coffee or a soft drink, and asks him to have a seat. She tells him that Cheryl, Dr. Smith's exam-room assistant, will be with him shortly and directs him to some client education literature placed conveniently near the reception desk. Or the client might view the virtual tour playing on the flat screen television in the reception room.

**3.** Linda places the file in a wall pocket outside the reception area and pages Cheryl to tell her that Mr. Jones is ready.

**4.** Cheryl picks up the record and reviews Casey's medical history, noting that he came in for a comprehensive physical exam and distemper/parvo vaccination. She also notes that it's been more than a year since they ran a fecal and that, according to the record, Casey hasn't been on heartworm prevention this past year.

**5.** Cheryl enters the reception area and greets Mr. Jones and Casey, then asks them to follow her to the exam room. On the way, Cheryl stops at the platform scale, weighs Casey, and notes his weight in the medical record.

**6.** When they get to the exam room, Cheryl reviews with Mr. Jones what they plan to do for Casey that day, informing him that Casey also needs to have a fecal exam and a heartworm check and be placed back on heartworm preventive. She communicates her care and concern without coming across as pushy. If Mr. Jones chooses not to take advantage of the preventive procedures, Cheryl will offer him a handout on the topic that he can read at home.

**7.** Before leaving the exam room, Cheryl offers Mr. Jones the opportunity to watch an educational video, then excuses herself.

**8.** Cheryl draws up the vaccinations and prepares anything else that might be necessary for the visit.

**Figure 1: Mystery Shopper Report**

Name of practice visited \_\_\_\_\_

Date of visit \_\_\_\_\_ Visited by \_\_\_\_\_

Type of service requested \_\_\_\_\_

Veterinarian seen \_\_\_\_\_

Please check off the additional services offered by this practice:

- Exotic/Avian Medicine     Boarding     Grooming     Pet Supplies  
 Prescription Diets     Obedience Training     Pet Foods  
 Other

When you first made your appointment, how were you handled over the telephone?

\_\_\_\_\_

\_\_\_\_\_

Distance of the practice from our hospital: \_\_\_\_\_ Miles

Describe the outside appearance of the practice. What was your impression of the sign, parking lot, landscaping, and other aspects of the external environment?

\_\_\_\_\_

\_\_\_\_\_

When you entered the practice, were you greeted by the receptionist?

- Yes     No

Comments

\_\_\_\_\_

\_\_\_\_\_

Describe the internal appearance of the practice:

Waiting room: \_\_\_\_\_

\_\_\_\_\_

Reception area: \_\_\_\_\_

\_\_\_\_\_

Product Displays: \_\_\_\_\_

\_\_\_\_\_

Informational Displays: \_\_\_\_\_

\_\_\_\_\_

Exam Room: \_\_\_\_\_

\_\_\_\_\_

What was the appearance of the doctors and staff?

Receptionists: \_\_\_\_\_

Technicians: \_\_\_\_\_

Veterinarians: \_\_\_\_\_

Practice Manager: \_\_\_\_\_

What was the overall attitude of the staff?

\_\_\_\_\_

What was the overall attitude of the doctor(s)?

\_\_\_\_\_

\_\_\_\_\_

Were you seen on time for your appointment?  Yes  No  
Please rate and describe the "bedside manner" of the doctor(s):

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Were you informed of other needed services and preventive vaccinations for your pet?  Yes  No

Comments

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Regarding marketing of products and services, did the practice:

- Have a hospital brochure or folder?  Yes  No  
Use an exam room report card?  Yes  No  
Use an exam room technician?  Yes  No  
Have a display of recommended foods?  Yes  No  
Offer a senior citizen discount?  Yes  No  
Have a display of pet supplies?  Yes  No  
Use a film or video for client education?  Yes  No  
Have a photo mural in the waiting room?  Yes  No  
Itemize your statement at the time of receipting?  Yes  No

Comments regarding the marketing activities of the practice:

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#### COMPETITIVE FEE ANALYSIS

Procedure	Visited Practice Fee	Our Fee
Comprehensive Physical Exam	\$ _____	\$ _____
Annual Distemper Vaccination		
Canine/Feline (circle one)	\$ _____	\$ _____
Fecal Analysis	\$ _____	\$ _____
Feline Leukemia Test	\$ _____	\$ _____
FELV/FIV Vaccination	\$ _____	\$ _____
Rabies Vaccination	\$ _____	\$ _____
Heartworm Medication	\$ _____	\$ _____
Flea Control Medication	\$ _____	\$ _____

Comments regarding the practice's fees and the perceived quality of service rendered:

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What do you think are the best aspects of the practice you visited?

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What do you think are the weakest aspects of the practice you visited?

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On a scale of 1 to 10 (10 being highest), how did their practice rate? \_\_\_\_\_ Rating  
From your observations of the other practice, in what ways can we improve our practice?

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**9.** Cheryl tells Dr. Smith that Casey is ready and gives her a quick run-down of what she discussed with Mr. Jones, including any information he gave her. Cheryl has learned that if she overlooks that step, Dr. Smith will ask the same questions—leaving Mr. Jones to wonder why he even bothered to talk with Cheryl.

**10.** Dr. Smith enters and greets Mr. Jones and Casey. After assessing the situation, she begins the exam. Cheryl restrains Casey and assists as necessary, leaving Mr. Jones free to listen to the doctor.

**11.** After the exam and vaccinations are done, Cheryl puts Casey on the floor. Dr. Smith asks her to read the fecal and heartworm check. If the heartworm check is negative, Cheryl will prepare the heartworm medication.

**12.** Cheryl does the routine laboratory tests and prepares and labels the medication. She also enters all the information into the computer as a held invoice.

**13.** Meanwhile, Dr. Smith reviews an exam-room report card with Mr. Jones. It tells him that a comprehensive physical exam was performed on Casey and documents any health concerns detected during the visit.

**14.** Cheryl returns to the exam room to give Dr. Smith the test results and Casey's medication. The doctor reviews the results with Mr. Jones and hands him the medicine. While going over the exam-room report card, Dr. Smith learns that Casey has a feline friend at home that has fleas, so she asks Cheryl to review flea-control recommendations with Mr. Jones.

**15.** Dr. Smith tells Mr. Jones and Casey good-bye, then excuses herself to write up the medical record. She then checks the computer to make sure all the information has been entered.

**16.** When Cheryl completes her client education, she escorts Mr. Jones and Casey to the reception desk and lets Linda take over.

**17.** Linda itemizes the client statement before giving Mr. Jones the total. After he pays, she gives him an itemized receipt and offers to help carry things or simply makes sure that Mr. Jones and Casey get to their car safely.

This scenario may seem idealistic, but exam-room visits just like this one occur in hundreds of veterinary hospitals across the country every day. When doctors can spend high-quality time with clients and render professional services, they make 10 minutes

with the client seem like 20, or 15 minutes seem like 30. Plus, the client has been left alone only a few minutes during the entire visit. As a result, the per-client transaction and the client-bonding rate increase significantly.

You have taken the first step toward creating your “10” practice.

Consider these practice tips to help make this process go a little smoother. First, the receptionist can acquire a picture of the pet and load it on the computer as soon as the patients comes in. This will help the veterinary team recognize the patient and not have to go out into the reception area and shout “Casey!” It is also helpful if you can get a head shot of the client in the picture to help with client identification. Second, the exam room assistant can use a pre-exam checklist (see page 51). These documents will provide a format to make sure the exam room assistant covers all the bases with the client and offers a full-service approach.

### **EVALUATE YOUR PRACTICE WITH A “MYSTERY SHOPPER”**

In order to know how clients truly perceive your practice, you need to be able to look at your practice objectively, from your clients’ point of view. One way to do so is to use a mystery shopper.

The “mystery shopper” concept is simple and used often by many other businesses and professions. An employee visits a neighboring practice with either the employee’s own pet or the hospital’s pet, then reports back to the practice regarding their experience, using a practice visitation report to highlight important areas. This report guides the evaluation by reviewing the entire out-patient visit, from the initial phone call to final payment. (See Figure 1, pages 8-9.) The employee should present the results at the next team meeting.

A mystery shopper program can open eyes, not only the practice owner’s but the team’s as well. And often the experience is reinforcing, because the staff learns that the quality of your practice greatly surpasses that of the competitor. Mystery shoppers I’ve worked with have returned saying, “The doctor didn’t even do a comprehensive physical exam!” or “When the receptionist told me the total amount due, she didn’t ask if she could itemize the services. That hospital doesn’t come close to ours!”

Many times employees return with good ideas to improve client service and enhance the practice’s perception of value. One hospital I consulted with sent a technician to visit a local practice.

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She was impressed that the doctor completed an exam-room report card. She also reported that the doctor had thoroughly verbalized the physical exam and spent time with her reviewing the medical history and his suggested preventive procedures. Previously I had tried to stress this very point to this practice but they had resisted the idea. But after experiencing it from the client's perspective, the practice realized its value, and doctors and technicians were eager to begin using exam-room report cards themselves.

A mystery shopper also can produce other benefits. I know of a group of veterinarians from a community who collaborate with mystery shoppers. As a group, they decided to have employees visit each other's hospitals. The visitation report would be shared not only with the shopper's own team but also with the team of the visited hospital. Because participating hospitals never know when a mystery shopper might walk in, they were especially vigilant to ensure every client had a positive experience. The anticipation of the mystery shopper kept everyone on his or her toes and fostered a healthy atmosphere of competition that benefited all the hospitals.

To initiate your own mystery shopper program, first develop a practice visitation form. Second, discuss the concept at your next team meeting, and ask for volunteers to be mystery shoppers. Next, the chosen mystery shopper should contact another practice in your community to make an appointment.

Keep in mind that although the mystery shopper can request almost any type of service, he or she will experience only the "public" side of the practice, just as your clients would. Therefore, if the shopper brings in a pet to be neutered, he or she will only experience the admission and discharge process and maybe a callback. However, the shopper will be much more involved with an annual comprehensive physical exam and vaccination visit and will gain greater insight. Naturally, the practice should pay all costs, including the mystery shopper's time. Consider the expense as an investment that will earn substantial returns.

### **DISCHARGING PATIENTS**

Paying careful attention to the discharge process is key to building clients' perception of your services' value. Your team must show clients that all surgical procedures deserve—and receive—your time and attention. One way to make a lasting impression: Set discharge

appointments so doctors can talk about the procedures performed and review discharge order forms with clients. (See page 36.) If clients don't understand the value of your services, they won't hesitate to take their pets to low-cost spay and neuter clinics. And if you teach your clients that routine procedures are "routine," they'll treat them as such—and underestimate their value.

### **HOW DOES YOUR HOSPITAL RATE?**

If you were to rate your practice's perception of value on a scale of 1 to 10, with 10 being the best, what would your score be? Your answer is critical—it will tell you how much you need to improve your clients' experience. Most veterinarians rate their practices a 6 or 7. Whatever your score, think about ways you can raise it. Remember, no practice can afford to rest on its laurels. In Chapter 3, we'll discuss how to enhance your practice's perception of value by adding client-pleasing amenities.