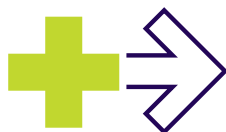


## Mystery Phone Shopper Training Report

Get ready to have callers at hello. This Mystery Phone Shopper Training Package celebrates skills that are shining examples of WOW! service and offers guidance in areas needing improvement.

Your Mystery Phone Shopper Training Report includes:

- Audio CD recording of the call
- Transcript of the call
- Evaluation and specific recommendations
- Action plan for phone skill development



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## Mystery Phone Shopper Training Report

**Note:** The following report is based on an actual mystery phone shopper call. The practice and receptionist's name have been changed for privacy reasons.

**Date:** January 2, 2007

**Time:** 12:25 PM

**Hospital Name:** ABC Animal Hospital

**Receptionist's name:** Kathy

**Address:** 123 Main St., Any Town, USA

**Phone:** 555-555-5555

**Phone shopper name used:** Jody Johnson

**Service that was shopped:** Spay for a 5-month old kitten; has only had Rabies vaccination.

**Description of mystery pet:**

Age: 5 months

Weight: Unknown

Pet name: Bell

Species: Feline

Breed: Siamese

**Total length of phone call:** 1 minute, 47 seconds

**Transcript of Call:**

**Kathy:** "ABC Animal Hospital. This is Kathy."

**Phone shopper:** "Hi, I'm calling to see how much a spay is."

**Kathy:** "Oh, Okay, um, let's see... How old is your kitty?"

**Phone shopper:** "5 months"

**Kathy:** "Okay...and...Is she up to date on vaccines?"

**Phone shopper:** "She's only had Rabies."

**Kathy:** "Okay, it might be a good idea to boost for those."

**Phone shopper:** "Okay."

**Kathy:** "Um, the...just the regular spay runs \$179. Basically, we send them home the same day..."

**Phone shopper:** "Okay."

**Kathy:** "They all have, um, the pre-anesthetic exam, um, we also do fluids, um, under their skin and some B vitamins and an antibiotic injection too at that time. Um, all these guys just get a good once over before too and we could boost her vaccines."

**Phone shopper:** "Now what would that include?"

**Kathy:** "It would be an FVRCP..."

**Phone shopper:** "Okay."

**Kathy:** "...and she's already had Rabies... I think that's all she should need. Um, is she indoors only?"

**Phone shopper:** "Yes."

**Kathy:** "Okay, yeah, then all she should need is the FVRCP, um, which runs \$20."

**Phone shopper:** "Okay, so all together I'm looking at about \$200?"

**Kathy:** "Yep."

**Phone shopper:** "Okay, well thanks for your help!"

**Kathy:** "All right, thanks"

**Phone shopper:** "Bye."

**Kathy:** "Bye."

Information discussed	Yes	No
Did the receptionist answer the phone professionally?	X	
Did the receptionist ask my name?		X
Did the receptionist ask my pet's name?		X
Did the receptionist use my name in the conversation?		X
Did the receptionist use my pet's name in the conversation?		X
Did the receptionist describe service before price? If yes, what key information was shared? <ul style="list-style-type: none"> <li>A regular spay runs \$179.00.</li> <li>Will go home the same day.</li> <li>Will have a pre-anesthetic exam, fluids, FVRCP vaccination.</li> <li>Total of \$200.00 for services.</li> </ul>		X
For anesthetic procedures, did the receptionist mention preanesthetic blood tests, monitoring, or pain medication? If yes, please describe what was discussed. <ul style="list-style-type: none"> <li>Pre-anesthetic exam</li> <li>Fluids</li> <li>B vitamin injection and antibiotics</li> </ul>	X	
Did the receptionist ask for the appointment (i.e. <u>WHEN</u> would you like to schedule the surgery/exam?)		X
Did the receptionist offer directions to the practice?		X
Did the receptionist say at least two great things about the hospital? If yes, what?		X
Did the receptionist offer to mail the phone shopper a written estimate, brochure, business card or other information? If yes, what was offered?		X
Did the receptionist ask personal questions that would bond me to your hospital and establish a trusting relationship?		X

Information discussed	Yes	No
Did the receptionist ask me about how I would pay or give information about possible payment methods and policies?		X
Did the receptionist tell me his or her name at the end of the call?		X

**Rate the friendliness of the receptionist:**

Excellent     Good     Fair     Poor

**Rate the helpfulness of the receptionist:**

Excellent     Good     Fair     Poor

### Evaluation and Recommendations:

**1. General greeting and number of rings:**

Number of rings before phone was answered: 1

Greeting: "ABC Animal Hospital. This is Kathy."

**Recommendation:** A good greeting includes: Salutation ► Location ► Identification ► Invitation. Instead, say, "Good morning, ► ABC Animal Hospital. ► This is Kathy. ► How may I help you?"

**2. Asking for and using the caller's and pet's names in the conversation:**

Kathy didn't ask for the caller's or her pet's name, nor did she use them in the conversation. This technique bonds the phone shopper to the practice and personalizes the call rather than having it sound like a spiel.

**Recommendation:** Ask the caller's and pet's names early in the call and use them frequently throughout the conversation. Here are ways to get the caller's and pet's names at the start of the conversation:

- ✓ "Thank you for calling our hospital. I'm happy to answer your questions. May I ask your name and your pet's name?"
- ✓ "I'm happy to provide that information. Let me start by asking your name and your kitten's name."

If the caller is uncomfortable sharing his or her name, simply ask for the pet's name. If the caller questions you about why you need a name, simply reply "so I can offer you personalized service."

**3. Placing the caller on hold:**

Where you placed on hold? No

If yes, how long?

Where you transferred? No

If yes, to whom? \_\_\_\_\_

#### 4. Describing the services and their value before the price:

Kathy gave the price of the spay first, and then briefly described what services were included.

**Recommendation:** Explain services in detail before discussing the price so the caller understands the value for the care being provided. Also be sure to ask for the appointment at the end of the call.

For example, Kathy might say, *“Your kitten should have the surgery done before her first heat, which usually occurs at 6 months of age. Are you familiar with this surgical procedure? It’s performed in our surgery suite and Dr. Smith uses the safest anesthesia available. We’ll also monitor your cat’s heart rate, level of oxygen in the blood and body temperature during surgery. We require/recommend pre-surgical blood work to make sure your kitten is healthy and pain medication after the surgery. Your kitten also will go home the same evening. For the surgery and hospitalization, the total is \$179. **WHEN** would you like to schedule your kitten’s surgery?”*

If your hospital requires an exam for new patients before surgery, you can change the last sentence to *“**WHEN** would you like to schedule your kitten’s pre-surgical exam?”* You might even direct the caller to two possible appointment times. Known as the “two yes options” technique, this phrasing significantly increases the chance you’ll schedule the appointment. For example, *“**WHEN** would you like to schedule your kitten’s pre-surgical exam? I have an opening at 9 am tomorrow or 1:30 pm on Tuesday. **Which** best fits your schedule?”*

Don’t overlook opportunities for other services the kitten may need. Kathy asked about vaccines, and the caller replied the kitten has only received Rabies vaccination. Does the kitten also need an intestinal parasite screen, deworming and Feline Leukemia/FIV testing and vaccination?

Kathy said the kitten would need FVRCP vaccination but didn’t explain what the acronym meant. Instead, say, *“Your kitten also will need a FVRCP vaccine, which protects her from feline distemper and two upper respiratory viruses.”*

#### 5. Discussing pre-anesthetic testing, monitoring and/or pain medication for anesthetic procedures:

Kathy explained that all pets being spayed get a pre-anesthetic exam, fluids during surgery, an injection of B vitamins and antibiotics after surgery to promote healing.

**Recommendation:** State your hospital's protocols and the benefits of pre-anesthetic blood testing, monitoring and pain management. Here are sample phrases to describe the benefits.

- ✓ **Pre-anesthetic testing:** *"We recommend/require pre-anesthetic testing. Just as your doctor would have you get a blood test before undergoing surgery, we offer the same for pets. This simple blood test can significantly reduce medical risk and ensure your pet's health and safety. If test results are within normal ranges, we can proceed with confidence, knowing anesthetic risk is minimized. But if results are not within normal ranges, we can alter the anesthetic procedure, or take precautions to reduce the risk of potential complications."*
- ✓ **Monitoring:** Explain monitoring in easy-to-understand terms, not medical jargon or "Veterinarianese" that makes the surgery sound expensive and scary. Instead of the term electrocardiogram, say *"We'll monitor your cat's heart rate."* Instead of the term pulse oximeter, say *"We'll monitor the level of oxygen in your cat's blood."*
- ✓ **Pain management:** *"A spay for a kitten is similar to a hysterectomy for women. That's why we recommend/require a pre-surgical pain-management injection that lasts 24 hours, and we will send you home with ongoing medication for a restful recovery."*

### 6. Asking for the appointment:

Kathy did not ask about scheduling an appointment.

**Recommendation:** Always ask for the appointment and offer the caller two choices. Known as the "two yes options" technique, this phrasing significantly increases the chance you'll schedule the appointment. For example, *"**WHEN** would you like to schedule your kitten's surgery? I have an opening tomorrow or on Tuesday. **Which** best fits your schedule?"*

### 7. Offering directions:

Kathy most likely didn't offer directions because no appointment was scheduled.

**Recommendation:** After scheduling the appointment, offer directions with phrases such as *"Do you know where we are located?"* or *"May I e-mail, fax or mail you a map?"* New clients, especially those new to the area, may not know where you're located. For an extra level of WOW! service, mail, fax or e-mail callers door-to-door driving directions from their home to your clinic from websites such as [www.mapquest.com](http://www.mapquest.com). Another bonus: Driving directions list the estimated travel time from her front door to your clinic so you'll increase the chances she'll arrive on time for the appointment.

### 8. Offering to mail a written estimate/treatment plan, brochure, business card or other information:

Kathy did not offer to give the caller any further information.

**Recommendation:** If the caller doesn't schedule the appointment now, offer to mail a written estimate/treatment plan. Enclose your hospital brochure and business card with a note such as *"We look forward to meeting you and Fluffy soon!"* Even if the caller chooses another clinic for the surgery, she may return to you for all future routine care.

If the caller schedules an appointment, offer to mail the same information listed above but add your new client registration form so the caller can complete paperwork at home and bring it to the appointment. Then you can start the first visit on time rather than having 10-15 minutes of valuable appointment or surgery check-in time eaten up with paperwork. Other alternatives include faxing or e-mailing the new client form to the caller. If your hospital has a website, ask the new client if she has Internet access. If she says yes, say, *"You can get an online tour of our practice, get driving directions, complete your new client form and meet our doctors and staff on our practice web site at [www.yourwebsite.com](http://www.yourwebsite.com)."* You also can ask new clients to arrive 15 minutes early to complete paperwork and get a tour of the hospital.

### 9. Selling the hospital's unique qualities:

Kathy failed to say anything positive about the practice to attract the caller.

**Recommendation:** Always state two GREAT things about your hospital! This helps the caller remember you in the list of other practices she called. You also might relate the two great things to the service she inquired about. Here are examples to distinguish your practice from others:

- ✓ *"You can bring your kitten in for surgery before work and pick her up the same evening on your way home."* This stresses convenience.
- ✓ *"We have experienced doctors and include pain management with all surgeries."*

### 10. Gathering pertinent information:

Although no appointment was scheduled, Kathy did not get any of the caller's information.

**Recommendation:** Always get the caller's and pet's names at the beginning of the conversation and use them throughout the discussion. At the end of the call, ask for the phone shopper's address so you can mail an estimate/treatment plan, brochure, business card or other information. For example, say, *"May I*

ask for your address and phone number so I can mail you an estimate/treatment plan that describes the services and costs we discussed? I'll also enclose our business card, hospital brochure and new client registration form.

### 11. Connecting with the caller:

Kathy did not ask any personal questions to build a relationship or attempt to make a connection with the caller.

**Recommendation:** Actively listen for information that would allow you to make a brief personal connection with the caller and develop a trusting relationship. For example, the caller might say she's new to the area. You could ask where she moved from or simply say, "Welcome to our neighborhood!"

### 12. Promoting payment methods you accept (i.e. major credit cards, CareCredit):

Kathy did not mention any payment information.

**Recommendation:** Methods of payment should always be promoted. A good time to do this is when the price range for services inquired about is quoted. For example, "For your convenience, we accept cash, checks, MasterCard and Visa..." This professionally yet subtly communicates your financial policy that payment is expected when services are rendered. The new client then shows up with her checkbook or the right credit card that you accept.

### 13. Ending the call:

Kathy simply ended the call with "All right, thanks, bye!"

**Recommendation:** Don't just provide information and hang up. Ask for the appointment with phrases such as "**When** would you like to schedule your pet's surgery?" not "Would you like to schedule an appointment?" The word "when" is a yes answer compared to "would you" which is a yes-or-no answer. Always ask for the appointment.

Restate your name at the end of the call, reconfirm the appointment time and date, and give excellent directions to your practice. You'll help new clients arrive on time. Compliment the caller's decision to

choose your hospital. *"You've made a great choice for Fluffy in choosing ABC Animal Hospital. We look forward to seeing you next Tuesday at 8 am."*

#### **14. Overall attitude / friendliness / helpfulness:**

Kathy's attitude was easy going and friendly. She answered my initial question but offered no other assistance to try to get me to become a client.

**Recommendation:** Try a more upbeat, helpful tone. Use a pleasant tone of voice—*HOW* you say something can be more important than *WHAT* you say. Go beyond just the caller's question. This call is an opportunity to start the conversation that turns into a lifetime client relationship.

#### **Action plan for skill development:**

1. Add to your greeting: *"How may I help you today?"*
2. Ask the caller's and pet's names early in the call and use them frequently throughout the conversation.
3. Explain services in detail before discussing the price.
4. State your hospital's protocols and benefits of pre-anesthetic blood testing, monitoring and pain management.
5. Always ask for the appointment and offer the caller two choices.
6. Offer directions over the phone or by mail.
7. Offer to mail a written estimate/treatment plan, brochure, business card or other helpful information.
8. State at least two great things about your hospital.
9. Get the caller's pertinent information, even if no appointment is scheduled.
10. Ask personal questions to make a connection with the caller and develop a trusting relationship.
11. Promote payment methods.
12. Try a more upbeat tone and help the caller get more than expected out of the call.
13. Use the Phone Shopper Worksheet at the end of this report to practice and fine-tune your skills.

#### **Overall Rating: 2**

5=WOW! Service

4=Ready to train others

3=Meets expectations

2=Opportunity for ongoing training in this area

1=Needs immediate training

This mystery phone shopper report was completed by: Sara M. Miller, Communication Solutions for Veterinarians Inc.

Phone Shopper Worksheet

Date of call \_\_\_/\_\_\_/\_\_\_ Time \_\_\_:\_\_\_ am/pm Receptionist \_\_\_\_\_

**Phone-shopped service:** (Check all that apply.)

- Exam & vaccinations     Spay     Neuter     Professional dental cleaning     Euthanasia
- Sick pet, symptoms, how long? \_\_\_\_\_
- Other \_\_\_\_\_

Caller's name \_\_\_\_\_ Pet's name \_\_\_\_\_

*"Thank you for calling our hospital. I'm happy to answer your questions. May I ask your name and your pet's name? Let me ask you a few questions about your pet so I can give you accurate information."*

Species:  Dog  Cat, Will your cat be  indoors,  outdoors or  indoor/outdoor?  
 Exotic \_\_\_\_\_  Other \_\_\_\_\_

Pet's gender  Male  Female Pet's age \_\_\_\_\_ weeks/years Spayed or neutered?  Yes  No

**Describe service first, price last:**

Services discussed: (Check all services that you spoke with the caller about.)

- Comprehensive physical exam
- Dog vaccinations:  Distemper combination  Bordetella  Rabies  Leptospirosis  Lyme  Giardia  
 Other \_\_\_\_\_
- Cat vaccinations:  FVRCP  Rabies  Bordetella  Feline Leukemia  FIV  Calicivirus  Giardia  
 Other \_\_\_\_\_
- Diagnostic testing:  Intestinal parasite screen  Heartworm test  Feline Leukemia test  
 FIV test  Senior screen  Other \_\_\_\_\_
- Deworming
- Heartworm preventatives \_\_\_\_\_ months
- Flea/tick preventatives \_\_\_\_\_ months
- Microchipping
- Spay  Neuter
- Professional dental cleaning
- Euthanasia: Attended euthanasia?  Yes  No;  Private cremation  Communal cremation  Burial
- Other \_\_\_\_\_

Services for anesthetic procedures: (Check all services that you spoke with the caller about.)

- Pre-anesthetic testing, type of testing recommended \_\_\_\_\_
- Monitoring (level of oxygen in the blood, heart rate, body temperature)
- Length of hospital stay:  Overnight stay  Discharged same day  Other \_\_\_\_\_
- Pain medication

Did you offer any complimentary services to entice the caller to schedule an appointment?

- First exam free for new clients
- New puppy/kitten "baby gift" of training handouts, food sample, first dose of heartworm and/or flea preventative free, etc.
- Complimentary pedicure
- Other \_\_\_\_\_

Fee quoted \$ \_\_\_\_\_

Say two great features about your practice 1. \_\_\_\_\_ 2. \_\_\_\_\_

**Referral source:**

*How did you hear about us?*

- Referred by friend, whom may we thank? \_\_\_\_\_
- Referred by veterinarian, whom may we thank? \_\_\_\_\_
- Drove by  Brochure  Previous client  Website  Yellow pages: Which one? \_\_\_\_\_

**Offer to mail the caller information:**

*“May I ask for your address and phone number so I can mail you an estimate/treatment plan that describes the services and costs we discussed? I’ll also enclose our business card, hospital brochure and new client registration form.”*

Welcome packet sent?  Yes  No

Caller’s name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Home phone (\_\_\_\_\_) \_\_\_\_\_

**Ask for the appointment:**

*“**When** would you like to schedule (pet’s name) appointment? I have an opening on \_\_\_\_\_ (date) at \_\_\_\_\_ (time) or \_\_\_\_\_ (date) at \_\_\_\_\_ (time). Which best fits your schedule?”*

Note: Always offer the caller a choice between two appointment times. Providing two “yes” options increases the chances you’ll book the appointment.

Did the caller schedule an appointment?  Yes  No

**Medical records:**

*“Please bring copies of your pet’s medical records/vaccination history to your appointment. Would you like us to call your previous veterinarian and have the records faxed directly to us before your appointment?”*

Previous veterinarian \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_

**Give clear directions:**

*“Do you know where we are located?”*  Yes  No

*“May I e-mail, fax or mail you a map?”*  Yes  No

E-mail address \_\_\_\_\_  Fax (\_\_\_\_\_) \_\_\_\_\_

Mail directions to: \_\_\_\_\_

**Reconfirm appointment and thank the caller for choosing your practice:**

*“You’ve made a great choice for \_\_\_\_\_ (pet’s name) in choosing \_\_\_\_\_ (practice name). My name is \_\_\_\_\_ in case you have questions before your appointment. We look forward to seeing you on \_\_\_\_\_ (date) at \_\_\_\_\_ time.”*

Comments \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_