

What to Do When You Overhear a Team Member Give a Client Wrong Information

By Wendy S. Myers



Q. While walking past the front desk, I overheard a receptionist explaining flea and tick products to a client. She gave the client some incorrect information. How can I give the client accurate information and not hinder this staff member's good intentions?

A. Giving clients inaccurate information can backfire on your practice's reputation, create conflicts among staff, and put your hospital at malpractice risk depending on the severity of the situation. Client miscommunication usually has one of three causes, says Dr. Robert P. Gordon, owner of Oakland Animal Hospital in Oakland, New Jersey, and The Animal Clinic of Ringwood in Ringwood, New Jersey:

1. Lack of training
2. Lack of understanding of a hospital policy or a poor policy that needs to be revised
3. Lack of competency that results in a grievous error

No matter what the scenario, you need to take action immediately to give the client correct information and help the staff member understand what should have been said. Act as a coach rather than a critic. Follow these steps to save face with the client and instill confidence in your team member:

1. Correct the situation quickly. Never display your lack of confidence in a co-worker. "If the client is in front of you, let the staff member finish what she's saying and then ask to speak with her privately for a moment," says Tracy Dowdy, CVPM, implementation director of Transformation for Success in Dallas, Texas. "Give her the correct information and then let her rectify the information with the client."

Harsh words can destroy the staff member's confidence and make her reluctant to share information with clients again. Simply ask her to tell the client, "I misspoke when I told you about this before. Here is more accurate information." Letting the team member redirect the conversation rebuilds clients' trust and serves as a learning experience. "Don't take over the

situation,” Dowdy says. “You don’t want to lose that client or hinder the confidence you’ve instilled in that employee. Let the employee handle it.”

2. If you’re not sure, ask. Keeping pace with new products, services, and protocols can prove challenging for new employees as well as seasoned staff members. Create a hospital culture where team members feel comfortable asking questions. After you explain the new information, ask if the team member has questions and feels ready to relay the information to clients. Most importantly, say, “Thanks for asking. I was glad that I could help you.”

3. Provide ongoing training to ensure everyone communicates the same message. When a client brought her 6-week-old kitten to Oakland Animal Hospital, a technician took the initial history before Dr. Gordon entered the exam room. The client wanted to bathe her kitten and asked the technician to recommend an appropriate shampoo. The technician said they didn’t carry a shampoo for a kitten younger than 8 weeks of age and asked the client to return in two weeks when the kitten was old enough for another brand. Dr. Gordon overheard the end of the conversation and politely asked to talk with the technician privately. He showed the technician a dry shampoo that would be appropriate for the 6-week-old kitten. Then the technician took the product into the exam room and showed the client how to use it. “I didn’t make a big deal of the situation,” Dr. Gordon says. “I just educated the technician. Then I made sure the entire staff knew that we had a new product.”

If team members are unsure of what product or service to recommend, they can say, “Let me check with the doctor.” Then they can get complete and accurate information to pass along. “We don’t embarrass a staff member in front of the client or other staff members,” Dr. Gordon says.

Through Transformation for Success, Dowdy works with hospital teams to teach them standards of patient care, service, communication, staff conduct, and appearance. Staff members also learn about their hospital’s protocols for flea and tick and heartworm preventives, nutrition, vaccines, and other routine services. Scripts and role-playing help staff members fine-tune their skills. “The objective of role-playing is to train your staff to handle real-life situations,” says Dr. Ernest Ward Jr., owner of Seaside Animal Care in Calabash, North Carolina, and author of *Creating the Veterinary Experience: Developing Effective Staff Communication* (E3 Management, 2000). “Staff members should be able to handle any scenario not because they are individually exceptional communicators, but because they have experienced the situation

before through role-playing. Never assume that a staff member can instinctively or naturally handle an untested situation. Role-play common scenes to test your staff and thereby build team confidence.”

Develop a list of typical client interactions that team members may encounter. During a staff meeting, recruit two volunteers to play the role of a client and staff member. Describe a situation and let them act out the conversation. Other team members observe the conversation, body language, and education methods used. After the skit, ask the person playing the client how he or she felt about the team member’s response. Also ask the group how they might have handled the situation differently.

Get everyone involved and avoid having the same two staff members do role-playing each time. You want team members to stretch outside their comfort zones in a safe environment. Consider these scenarios:

- A client with an indoor/outdoor cat isn’t protecting her pet from heartworm infection.
- When the receptionist hands the client his bill, he complains about the cost of lab tests.
- A client with a 7-year-old cat has never had her pet’s teeth cleaned and you see signs of advanced periodontal disease.
- A client uses an over-the-counter flea and tick product from a grocery store.
- A puppy is scheduled for a neuter and you recommend a pre-anesthetic blood test.

Bob Levoy, a practice-management consultant in Roslyn, New York, and author of *101 Secrets of a High-Performance Veterinary Practice* (Veterinary Medicine Publishing Group, 1996) says role-playing can be a fun learning experience. Research reveals how comprehension rates improve based on the method of learning:

- **Reading** training materials generates about a 10 percent comprehension rate.
- **Hearing** yields a 20 percent comprehension rate.
- **Seeing** increases comprehension to 30 percent.
- **Watching** someone perform the task brings about a 50 percent comprehension rate.
- **Participating** in the task produces a 70 percent comprehension rate.
- **Doing** the task or performing the simulation alone results in a 90 percent comprehension rate.

Encourage staff members to submit training topics for staff meetings. Dr. Gordon keeps a file folder of agenda items and topics that all employees can access. When preparing a staff meeting, Dr. Gordon and the practice manager check the folder for staff input.

4. Review your hospital policies. A modified or outdated policy may be the culprit if the miscommunication occurs frequently. “Maybe the doctors didn’t tell the staff about a protocol

change or perhaps a payment policy isn't clear," Dr. Gordon says. To ensure the information is crystal clear, explain it to staff members and put it in writing. You might have staff members initial the document to show they've read it and understand the new policy or protocol. This extra step is especially important with part-time staff, Dr. Gordon says.

5. Document grievous errors. In addition to coaching the employee on the correct method, you need to write down what happened and the action you took. Place the note in the employee's personnel file. If you must fire the staff member or face a malpractice risk, this documentation is key.

"If you train people, this issue won't come up," Dowdy says. "Most hospitals throw you into client situations without being trained. You've got to have discernment regarding each situation."

About the Author:

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consulting firm helps practice owners and teams improve compliance, client service and hospital management. Communication Solutions for Veterinarians has provided mystery phone shopper training for more than 1,500 receptionists nationwide. Wendy is the author of three books and five videos. Subscribe to Communication Solutions for Veterinarians' monthly e-newsletter at www.csvets.com.