



Phone Skills Coach scorecard

Share this sample report with employees so they understand how calls will be assessed.

Hospital:
<Hospital info>

Employee:
<Employee name>

Contact:
<Contact info>

Date of call: Saturday, May 26, 2018
Time of call: 10:31 a.m.
Length of call: 2 minutes, 27 seconds

Scenario shopped:

The caller asked about an exam and vaccines for a 12-week-old kitten that was adopted from a shelter. The Siamese kitten, named Patches, has had one booster of feline distemper. The kitten had an intestinal parasite test and was positive for roundworms. She was dewormed. The kitten has not been tested for feline leukemia and FIV. The kitten was microchipped and spayed at the shelter. The kitten will be indoor/outdoor.

Potential needed services:

May vary based on your standards of care. Checked services were offered.

- Exam
- FVRCP vaccination
- Rabies vaccination
- Feline Leukemia/FIV test
- Feline Leukemia/FIV vaccination
- Intestinal parasite screen
- Deworming
- Flea/tick and heartworm preventatives
- Kitten baby gift with free dose of flea/tick and heartworm prevention and educational literature

Mystery caller name:
Jerry Miller

Mystery pet name:
Patches

Phone Skills Coach Scorecard **Score: 85%** **4 of 5 stars**

Scoring Scale:

- | | |
|---|-------------|
| 5=WOW! 5-star service | 100% to 90% |
| 4=Ready to train others | 89% to 80% |
| 3=Meets expectations | 79% to 70% |
| 2=Opportunity for ongoing training in this area | 69% to 60% |
| 1=Needs immediate training | 59% to 0% |

Skills measured	Response	Earned	Possible
1. SPEED OF ANSWERING Did <employee name> answer the call within 3 rings? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Was the caller placed on hold? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	2 rings Follow a standard of service to answer calls within three rings. Answering on the first ring is five-star service. Watch my YouTube video on answering calls promptly at www.youtube.com/watch?v=N0nniTxKHKo .	3	3

<p>2. GREETING Did <employee name> deliver an effective greeting, including a salutation, hospital name, employee name and an invitation for service? <input checked="" type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Was <employee name> friendly? <input checked="" type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Was <employee name> helpful and eager to answer the phone shopper's questions? <input checked="" type="checkbox"/>Yes <input type="checkbox"/>No</p>	<p><Employee name>'s greeting was, "Thank you for calling <hospital name>. <Employee name> speaking. How may I help you?"</p> <p><Employee name>'s greeting had the four elements of: 1) Salutation, 2) Hospital name, 3) Employee name and 4) Invitation for service. Slow down, your greeting seemed a little rushed.</p> <p>Update your greeting to: "Welcome to <hospital name>. This is <employee name>. How may I help your pet today?" The phrase "Welcome to" is shorter and more inviting. Try "How may I help your pet today?" to put the focus on the patient.</p>	<p>5</p>	<p>5</p>
<p>3. ENGAGING Did <employee name> ask for and use the caller's and pet's names? <input checked="" type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Did <employee name> ask about the pet's breed, choice of name, whether new to the area, where the pet was adopted, or other questions to start a relationship? <input checked="" type="checkbox"/>Yes <input type="checkbox"/>No</p>	<p>The caller explained he and his daughter adopted a 12-week-old kitten. <Employee name> asked when the pet was adopted, which was last week. She asked if the pet had seen a veterinarian yet. The caller said no. His records showed the kitten had one vaccine of feline distemper, was dewormed, microchipped and spayed.</p> <p><Employee name> asked, "Can I get your name, sir?" The caller said his name is Jerry Miller. <Employee name> asked the kitten's name, which is Patches. She repeated names several times during the conversation.</p> <p>When a caller asks, "What do I need to do for a 12-week-old kitten?" Reply, "I'm happy to share information. Let me start by asking your name and your kitten's name. Then I will ask you questions about your kitten to determine which medical services it will need."</p>	<p>5</p>	<p>5</p>
<p>4. DETERMINING NEEDS Did <employee name> ask questions to determine which services and products the pet will need (age, vaccination status, weight, health concerns)? <input checked="" type="checkbox"/>Yes <input type="checkbox"/>No</p>	<p><Employee name> asked when the distemper vaccine was given and explained it needs to be boosted in three weeks. She explained the kitten will need another distemper booster now and rabies in a few weeks. <Employee name> offered an option of feline leukemia vaccine.</p> <p>Ask questions such as: How old is Patches? Where did you adopt Patches? Which vaccines has your pet had and when were they given?</p>	<p>18</p>	<p>20</p>



	<p>Has Patches had an intestinal parasite test to check for worms? If yes, what was the result? Has Patches been tested for Feline Leukemia and FIV? If yes, what was the result? Have you seen any fleas, or has Patches been scratching? Which flea/tick and heartworm preventatives are you using? Do you have any other pets at home? Has Patches been spayed? Will Patches live indoors, or will she be allowed to go outside?</p> <p>Based on your standard of care for a 12-week-old kitten, should <employee name> also discuss a feline leukemia/FIV test, deworming and preventatives?</p>		
<p>5. COMMUNICATING VALUE Did <employee name> describe services before quoting prices? <input checked="" type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Did <employee name> give a total for services rather than individual prices? <input checked="" type="checkbox"/>Yes <input type="checkbox"/>No</p>	<p><Employee name> told Mr. Miller she could give him a rough estimate. The caller heard dead-air and <employee name> typing in the background. While accessing information on the computer, fill dead-air time with a question that will let the caller talk. <Employee name> could say, "Have you had a kitten before?" or "Where did you adopt the kitten?"</p> <p><Employee name> said the visit will cost \$91 to \$120. She presented services before prices.</p> <p>When explaining your new kitten protocols, lead with the exam because it is the first service the veterinarian performs and emphasizes the importance of regular checkups. Here is a sample conversation: "Congratulations on your new baby, Patches! As a 12-week-old kitten, Patches will need a nose-to-tail exam to check her growth and development. The doctor will vaccinate Patches for FVRCP to protect her from feline distemper and two upper respiratory diseases, feline leukemia and rabies, which is required by state law (Tailor this script to your vaccine protocol). We will perform an intestinal parasite screen to check for worms and deworm your kitten because certain worms can be passed from pets to people. We will teach you about nutrition, socialization, litter box training, parasite control and kitten-proofing your home. As our baby gift to Patches, you'll receive a free dose of flea/tick and heartworm prevention, an</p>	<p>15</p>	<p>15</p>



	<p>educational book, a sample of kitten food, a vaccine record-keeper, a pet food measuring cup, treats, and 30 days of pet insurance. This gift is valued at \$____. The total/range for Patches' first visit will be \$91 to \$120. To help you prepare for your visit, we accept cash, checks, debit and credit cards, and CareCredit. When would you like to schedule Patches' appointment? We could see her today at 11 or 11:30 a.m. Which fits your schedule?"</p>		
<p>6. PROMOTING YOUR CLINIC Did <employee name> share two qualities of your hospital? <input type="checkbox"/>Yes <input checked="" type="checkbox"/>No</p> <p>Did <employee name> describe any new client incentives? <input type="checkbox"/>Yes <input checked="" type="checkbox"/>No</p>	<p>Because price shoppers often contact four veterinary clinics, make yours stand out. Share two qualities about the service that the caller is inquiring about.</p> <p>For a new kitten call, you might share these two qualities: 1) We offer convenient hours on evenings and weekends, and 2) On your kitten's first visit, you'll receive a baby gift that includes <describe items>, which is a value of \$____. If you offer kitten packages, also share this information.</p>	0	5
<p>7. ASKING FOR THE APPOINTMENT Did <employee name> ask for the appointment? <input checked="" type="checkbox"/>Yes <input type="checkbox"/>No</p>	<p><Employee name> said, "I can actually get you in today. I have an 11:30 a.m. available."</p> <p>Lead the caller to schedule the exam now with the two-yes-options technique. Ask "when" and then offer the next two exam times. Say, "When do you want to schedule Patches' exam? We could see her at 11:30 a.m. today or 9 a.m. tomorrow. Which fits your schedule?"</p>	29	30
<p>8. FOLLOWING UP WITH MARKETING Did <employee name> offer to email or mail the phone shopper a treatment plan, brochure, business card, link to website or other information? <input type="checkbox"/>Yes <input checked="" type="checkbox"/>No</p>	<p>If the caller doesn't book an appointment now, direct her to your website where she can learn more about your services and team. Another option is to email the caller information you discussed today. Say, "May I email you the information we discussed today so you have the details when you're ready to decide? I also will include a link to our website, where you can get a tour of our hospital, get driving directions, complete your new client form and meet our team on our website at <your website>."</p>	0	5
<p>9. PREPARING FOR FIRST VISIT Did <employee name> offer driving directions?</p>	<p>Because the caller is a new client, ask, "Do you know where we are located?"</p> <p>Promote payment methods that you accept.</p>	0	2

<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Did <employee name> explain payment choices that your hospital offers? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	After quoting the price or range, say, "To help you prepare for your visit, we accept cash, checks, debit and credit cards, and CareCredit." This professionally yet subtly communicates your financial policy that payment is due when services are delivered. The new client then shows up with proper payment.		
10. LEADING THE CONVERSATION Did <employee name> lead the conversation and guide the phone shoppers' decision-making? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<Employee name> led the conversation. Call time is more efficient when the employee leads the call.	5	5
11. GENERATING RETURN CALLS AND REFERRALS As a prospective client, did the phone shopper experience service that would encourage her to call back or make an appointment with this employee? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Based on this phone call, would the phone shopper recommend this veterinary hospital to a friend or colleague (net promoter score)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Did <employee name> thank the phone shopper for calling and restate her name at the end of the call? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	This phone experience was above average. Based on this call experience, the pet owner would likely schedule an exam and recommend <hospital name> to friends and family. When closing the call, say, "Thank you for calling us, Mr. Miller. I look forward to meeting you and Patches. If you have questions, my name is <employee name> and I'd be happy to help."	5	5
TOTAL POINTS		85	100

Call summary

What <employee name> did well:

- <Employee name> answered within two rings.
- She delivered an effective greeting. Just slow down.
- <Employee name> asked the caller's and pet's names and used them in the conversation.
- She asked questions to determine which medical services the kitten will need.
- <Employee name> offered an appointment today.

- She described services before quoting prices.

Suggested improvements:

- Explain the need for a feline leukemia test, deworming and preventatives.
- While accessing information on the computer, fill dead-air time with a question that will let the caller talk.
- Offer driving directions to new clients and share your payment choices.
- Promote new client incentives such as a kitten baby gift.
- If callers don't schedule, share your website or offer to email a treatment plan for the services discussed.

Note for feline leukemia/FIV vaccine: The American Association of Feline Practitioners recommends that all cats under 1 year of age be vaccinated against FeLV and receive a booster vaccination 1 year later. After 1 year of age, the need for subsequent vaccination is determined by risk factors that the individual is exposed to. Download AAFP vaccine guidelines at <http://journals.sagepub.com/doi/pdf/10.1177/1098612X13500429>.

Would you test a stray kitten for feline leukemia/FIV during the first exam? The American Association of Feline Practitioners recommends testing new cats entering a household or in homes where other cats are present. Download the Feline Retrovirus Guidelines at www.catvets.com/guidelines/practice-guidelines/retrovirus-management-guidelines.

Meet your Phone Skills Coach consultant



Wendy S. Myers, CVJ, owns Communication Solutions for Veterinarians in Denver, Colorado. Her consulting firm helps teams improve telephone and communication skills, client service, and compliance. Communication Solutions for Veterinarians is a leader in phone-skills training. Wendy offers monthly CE credit webinars. She is a certified veterinary journalist and author of five books, including *101 Communication Skills for Veterinary Teams*. Wendy is a member of the American Animal Hospital Association and has been an instructor for AAHA's Veterinary Management School. She serves on a committee for the Foundation for Veterinary Dentistry.

Contact: Wendy S. Myers, CVJ, President, Communication Solutions for Veterinarians Inc., 6455 Montano Place, Castle Pines, CO 80108, USA; 720-344-2347; wmyers@csvets.com; Csvets.com; [Facebook.com/csvets](https://www.facebook.com/csvets); [YouTube.com/csvets](https://www.youtube.com/csvets); [@wendysmyers](https://twitter.com/wendysmyers)

Helpful resources	Link
Article: 6 scheduling secrets for receptionists	www.csvets.com/news/downloads/20045.pdf
Article: Could a bad phone call cost your clinic \$13,000?	www.csvets.com/news/downloads/20031.pdf
Article: How to efficiently manage scheduling calls	www.csvets.com/news/downloads/20048.pdf
Book: <i>101 Communication Skills for Veterinary Teams</i>	www.csvets.com/cart/books-and-cds/101-communication-skills-for-veterinary-teams/
CSVETS YouTube channel with telephone, communication and client service videos	www.youtube.com/csvets
Facebook: Phone Skills Friday. Like us to see a new telephone script every Friday	www.facebook.com/csvets
Webinar: 10 phone skills every receptionist should know	http://shop.csvets.com/receptionist-skills/10-phone-skills-every-receptionist-should-know/
Webinar: Own the phone: How to lead conversations	http://shop.csvets.com/receptionist-skills/own-the-phone-how-to-lead-conversations/