IDEXX Veterinary Software

From Awkward to Effective

Navigating Difficult Client Conversations

How trust, training, and software can help your team communicate about sensitive issues

Practice doesn't always make perfect

Challenging conversations are a common part of veterinary medicine—but despite these discussions' frequent and often unpredictable nature, many veterinary professionals feel anything but practiced in the art of managing difficult client conversations.

Unfortunately, mismanaged or unsuccessful conversations can have a far-reaching effect. In addition to impacting patient outcomes, client satisfaction, and practice revenue, over time the chronic stress and poor outcomes associated with unsuccessful communications can have a direct effect on veterinary team morale, emotional health, job satisfaction, and workplace culture. Challenging conversations are definitely a high-stakes game, but, fortunately, strategies are available to mitigate the risk and improve the outcomes for everyone involved.

Cat got your tongue?

Some of the most dreaded veterinary conversations include:

- Delivering a poor prognosis
- Discussing financial concerns
- De-escalating an angry or upset client
- Firing a difficult client

If challenging topics and scenarios trigger awkward, embarrassing, and uncertain feelings, learn to lean into the discomfort and reimagine your approach. To drive home your message—rather than deny or suppress a situation's emotional complexity—learn to embrace the significance while carefully shaping—not forcing—the outcome. By cultivating an internal and external trusting, intentional, and open environment, you can forge team and client relationships that are unified—rather than divided—by serious conversations.

"The character of a man is known from his conversations."

Menander, Greek Dramatist

Getting comfortable with discomfort

Difficult conversations will always be uncomfortable. Emotionally charged or deeply personal topics simply cannot be neutralized in a way that provides a completely objective experience for either party. However, in addition to recognizing that a subject or situation is naturally volatile or challenging, try to identify other factors contributing to embarrassing, helpless, and fearful feelings, such as:

Unpredictability

Being unable to anticipate a client's response can leave some veterinary team members feeling unprepared and out of control.

Emotional attachment

Balancing professional distance with client and patient relationships can cause some team members to appear taciturn and disinterested, while others may struggle to create healthy boundaries.

Fear of failure

Whether knowingly, many veterinary professionals internalize declined treatment plans, noncompliance, and clients' false accusations as personal failures, negatively reflecting their veterinary care abilities. Additional factors, such as decreasing profits, low productivity, and negative reviews, can increase the pressure.

Fear of judgment

Veterinary professionals are constantly pushing back against the commonly held belief that they're only in the profession for the money. As a result, they may choose to skirt financial topics, soften the bottom line by granting discounts, or speak about costs in vague terms.

> **"The single biggest problem in communication is the illusion that it has taken place."**
>
> *George Bernard Shaw, Irish Playwright*

Take the (conversational) wheel

After you have identified and acknowledged negative emotions, follow these strategies to turn these potential barriers into building blocks to help ensure confident, purposeful, and productive client conversations.

You may not be able to predict how a challenging conversation will proceed, but you can take preemptive steps to ensure a positive—or at least peaceful—outcome. Follow these five strategies:

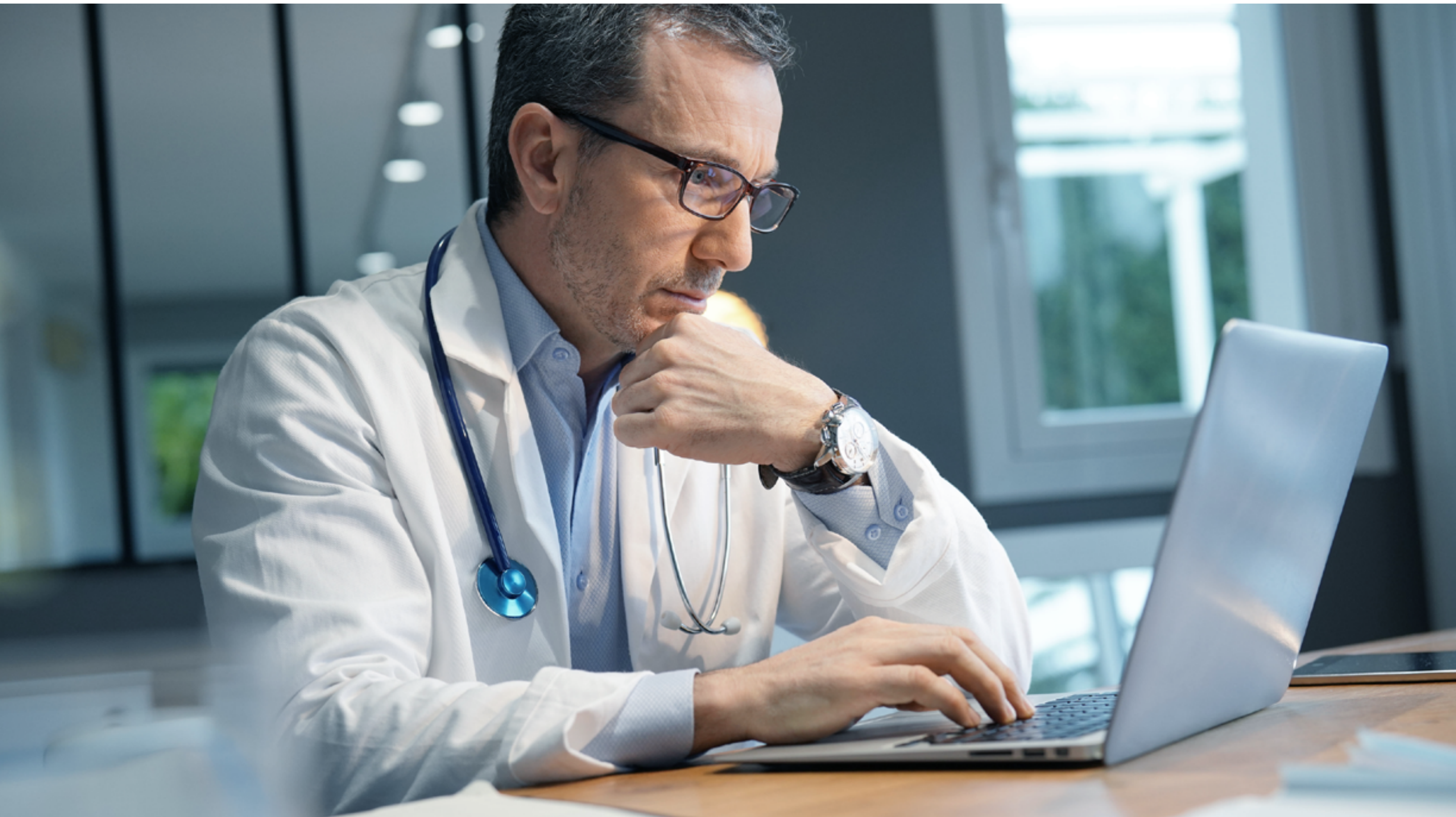
01	**Consistent messaging**	Your practice should have a cohesive patient care vision, which should be an underlying theme in every client conversation. Your client messaging should always convey your concern and value for the patient, acknowledging your mutual goal, which is to ensure their pet receives the best-quality care.
02	**Safe environment**	Conduct difficult conversations in person—in a quiet and private space. Never discuss sensitive matters in the reception area, treatment room, or a common corridor.
03	**Scheduled time**	Schedule difficult conversations for their own dedicated time slot, which prevents the veterinary team from feeling rushed and helps the client feel valued and heard.
04	**Preparation**	Ensure you are up-to-date on the latest patient or client information by reviewing the record or any other relevant materials before a conversation. Preparation demonstrates the desire to understand a client's concerns, provide all the necessary information, and reach an agreeable outcome.
05	**Team training**	Practice owners and managers can educate and equip their teams with the necessary tools and training to help manage or troubleshoot difficult conversations.

How can veterinary software help?

Software can help you leverage aspects within your control. User-friendly design and one-click access let you quickly record or review client communication notes, while searchable charts let you quickly locate and review relevant patient information. Detailed record keeping helps ensure your team members are all on the same page, minimizing communication confusion.

Regardless of the result, IDEXX client-friendly tools keep you from having to have the same conversation or craft the same email over and over. By leveraging our pet owner tools available within VetConnect PLUS and on IDEXX.com, you'll save time and be able to keep a consistent, thoughtful message with ease. These include:

- Client-positive handouts within IDEXX.com that help remove pet parents' anxiety over a positive result. These offer a quick summary of what their pet tested positive for as well as next steps
- Patient-specific Client Friendly Summaries within VetConnect PLUS that celebrate negative results and explain the benefits of screening



Building trust through relatability

Trust is at the heart of successful client communication and can mitigate or prevent many misunderstandings. The ideal client-practice relationship is built on consistent and positive interactions with your hospital brand, which includes:

Your practice's core beliefs and priorities

Clients should be able to see your team draw from your practice's mission statement and standard of care in every action.

Recommendations

Veterinarians and technicians should clearly understand recommended services and their application, ensuring they clearly and consistently convey a test's or treatment's value, importance, and benefits. IDEXX offers free client communication tools to support preventive care conversations before, during, and after the visit.

Perceived value

Now more than ever, communicating the benefit of each recommended treatment or service is critical to help clients look beyond the financial cost of care. Client education—beginning with the veterinarian and reinforced by veterinary team members—is an ongoing and critical strategy to help clients understand the important care you are providing to their pet.

Standard of care

Consistent protocols and processes help clients feel confident about following veterinary recommendations.

Marketing

Online, print, and in-person marketing should accurately reflect your practice's professional voice and values, not undermine them with conflicting messages.

Consistent client interactions build clear expectations, which increase confidence in your recommendations and compliance with your care instructions. When a client understands—and witnesses firsthand—the benefits of saying, “Yes,” conversations’ obstacles are minimized because they recognize their pet has received consistent care.

The Software Effect

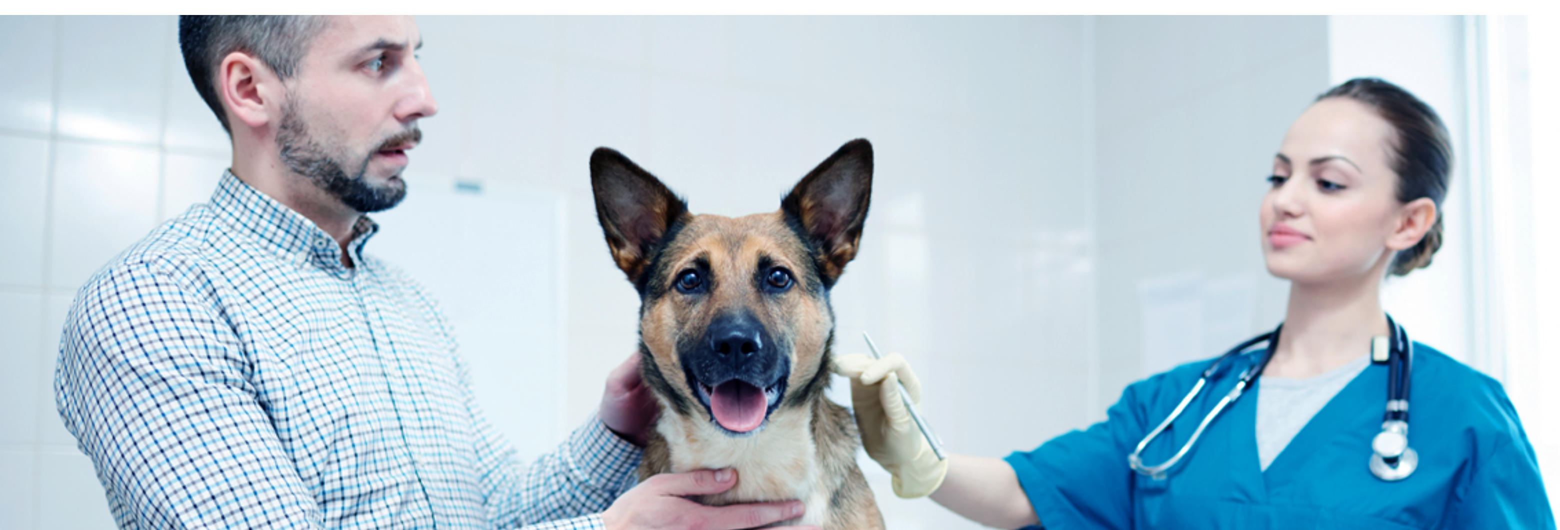
Software can improve how you communicate your practice’s value. When you can readily share diagnostic images, test results, client summaries, and before-and-after pictures, you bring previously abstract ideas to life and drive home the importance of your recommendations.

Do you or your team need conversational coaching?

What's your baseline skill set for difficult conversations? Mark the appropriate box to state whether you agree or disagree with the following statements:

Yes	No	
○	○	I avoid confrontation and emotional situations whenever possible.
○	○	Difficult conversations make me feel a loss of control.
○	○	Pet ownership is a privilege, so I have difficulty empathizing when an owner requests discounts or alternative treatment plans.
○	○	I struggle to keep my anger in check when a client is yelling at me.
○	○	I postpone firing clients because I'm worried about backlash.
○	○	Clients frequently ask us to remove items from their pet's estimate or treatment plan.
○	○	I often find discrepancies between a signed estimate and the final total on an invoice.
○	○	I feel like a failure when clients decline recommended treatments or services.
○	○	I do not feel comfortable discussing charges or reviewing estimates with clients.

Agreeing with any of these statements suggests your and your team members' conversation style has room for improvement.



Say nothing, say everything: embrace active listening

Part of the reason why difficult conversations are so intimidating is the perceived loss of control—not knowing how a client may react and the risk of being thrown off your standard script or intended message. Active listening techniques can ground you in the present moment by giving you a clear objective—to understand nd problem solve—while also conveying openness and empathy to the client. Active listening tips include:

Pause
Allow your client time to think after you deliver a diagnosis, present an estimate, or ask a weighty question. Resist the urge to fill the silence with nervous chatter, explanations, or platitudes. Observe your client for nonverbal cues that suggest they are preparing to speak.

Open posture
Avoid taciturn or defensive body language (e.g., crossing your arms or legs, bracing against furniture, clutching a chart to your chest). When possible, take a seat, keeping your body still and oriented toward the client. Maintain polite eye contact and lean in to demonstrate attention and interest.

Withhold judgment
Reserve any preconceived notions and listen to understand. Remember that a client—no matter how upset or angry—is most likely operating from a place of love and concern for their pet, not out of malice or apathy.

Clarification
Take note of anything the client says that is unclear and ask targeted but open-ended questions after they've finished speaking.

Summarize and reflect
Rephrase a client's concerns in your own words to ensure you've understood them correctly. Don't propose solutions until you've confirmed your understanding is accurate.

Don't wait for difficult client conversations. Hone your active listening skills by practicing with colleagues and family, and during routine wellness visits.

The Software Effect

Use digital messaging to communicate with clients beyond your practice's walls. Increased access to their pet's veterinary team can bond clients to your practice, foster trust, and improve client education—all which can increase compliance and minimize frustration and conflict.

Reactive clients: dealing with emotions

Grief, fear, and frustration are common during difficult conversations as pet owners grapple with bad news, negative outcomes, or financial limitations. However, these volatile emotions can also arise from a veterinary team member when they must deliver a pet's poor prognosis to their caregivers or attempt to manage an angry client. Follow these tips to navigate challenging emotional responses:

Don't interrupt

Interruptions can escalate frustration and prevent clients from feeling heard. Resist the temptation to correct or clarify, and avoid minimizing your client's grief or anger with platitudes.

Determine the root cause

Close listening can provide key insights about your client's true feelings. When in doubt, always assume their grief or frustration is genuine and comes from a place of love for their pet. By relating to the client, you help keep your own emotions in check.

Take notes

Write down any of a client's significant words or phrases, so you can guide the conversation or seek additional clarity after they're completely finished speaking.

In addition to dealing with a client's strong emotions—and to maintain a professional demeanor—you must learn to control your feelings. If you feel your own emotions rising in response to your client's, take action:

Tag out

Having a new team member step in can provide a fresh perspective on the situation and prevent escalation.

Take a break

Five or ten minutes to get some water or simply leaving the room can provide a conversational reset, enabling everyone to clear their heads.

Reschedule for another time

Invite the client to return in a day or two—after having time to fully digest the information you have provided—for a scheduled meeting.

How can veterinary software help?

Avoid cost-related conflict and confusion by using customizable templates to create consistent treatment plans. Once a treatment plan is approved, charges can easily be moved to the patient chart for accurate nursing orders and effortless, surprise-free invoicing.

Become friendly with financial foes and woes

Cost-based conversations typically involve each of your veterinary team members. As such, each team member should be comfortable and confident discussing monetary matters with clients. Comprehensive training and a positive practice culture are powerful tools for helping minimize finance-related frustrations and ensuring each pet owner feels respected.

Setting expectations

Consistent standards of care set clear expectations for clients. Don't be shy when speaking about cost —a high fee is generally necessary to ensure the highest care level.

Making recommendations

Strive to deliver clear and confident recommendations by fully explaining and justifying a test or treatment and the service's cost.

Provide payment options

Ensure a pet owner is made aware of any alternative payment options accepted by your practice (e.g., in-house financing, CareCredit, ScratchPay, pet insurance, wellness plans).

Presenting the estimate

Technicians or assistants should be able to discuss each item or service on a patient estimate and communicate to the client the service's purpose and necessity. When you provide a financial estimate for an ill patient's care—including all anticipated visits and treatments—you demonstrate to a client your practice's complete transparency, thereby increasing compliance.

Giving the client space

If your client's attention focuses on the final total, let them sit with their thoughts before explaining the itemized services. To ensure a client has time to consider their options and ask questions after you review their estimated invoice, also consider offering them some space to think.

The Software Effect

Use your software to offer versatile payment options, such as online, text, and in-person processing; calculating and scheduling financing; or using integrated wellness plans to enhance your client's access to care.

Declined: how to bounce back after a negative response

A client's rejection of care for their pet isn't personal. Remember that your clients are simply doing the best they can for their pet based on their current financial or personal circumstances—and that you both share the same common goal. Whenever possible, work with the client to determine a more accessible care option for their pet.

The Software Effect

Recording declined services in the patient electronic medical record can help you track previous care conversations and outcomes.

Detailed notes can guide future discussions or prevent client frustration by helping you and your team avoid making repeatedly refused recommendations or broaching sensitive topics.

Walk in their shoes: training the team

The best communication is honest, direct, and compassionate—but managing difficult client conversations with confidence and sincerity takes practice and experience. Providing your entire team with opportunities to acquire and rehearse key communication skills can accelerate this process and give everyone the opportunity to be successful, even when conversations become uncomfortable. Effective conversation rehearsal strategies include:

Role-playing

Although this is likely every introvert's worst nightmare, structured role-playing can create a safe space for practicing and refining verbal and nonverbal communication while team members develop their own personal style.

Shadowing

Enable newer staff members to observe experienced team members during key client interactions such as presenting and reviewing an estimate or explaining what to expect during an end-of-life appointment. This passive education can help less-experienced staff become familiar with your practice's unique soft skills and techniques.

Involving the team

Sharing interesting cases, early diagnoses, and patient care wins with all team members can help each member understand recommended services' real-life benefits and purpose, reinforcing your practice's standard of care and helping the entire team feel invested and intentional when sharing information with clients.

Normalizing the negative

Team members should be trained to expect negative responses, including declined services, obvious anger and frustration, or requests to speak to or work with someone else. Remind team members that this is not a personal or professional reflection on them, but is based on the client's personal concerns or fears. In such a situation, give the team member the tools they need to troubleshoot (e.g., tag out, notify a supervisor).

How can veterinary software help?

State-of-the-art software's streamlined one-click access and user-friendly design can accelerate practice workflow and improve your team's efficiency—creating more time for training and professional development.

Ready, aim, fire! When to end the conversation with challenging clients

Knowing when to terminate a client relationship can be vital for your veterinary team's morale, emotional and physical safety, and overall practice health. However, the act of ending a client relationship is often postponed because of concerns about potential backlash or retaliation. Sadly, such a delay can lead to escalating a client's toxic behavior and increasing internal issues such as staff burnout and turnover.

When a client's actions cannot be corrected through boundary setting, verbal warnings, and other management strategies, use the following steps to say goodbye.

1. Provide the client with examples of their inappropriate behavior to illustrate and reinforce your decision to end the relationship.
2. Inform the client that your practice no longer suits their needs or can provide their pet's care through an in-person discussion or by phone.
3. Avoid apologetic language that might suggest your practice team's wrongdoing or remorse.
4. Remain professional by focusing on their pet's future by wishing the client and pet health and happiness.
5. Follow up the conversation by sending the client a written letter that includes a paper copy of, or digital link to, their pet's medical record.

The Software Effect

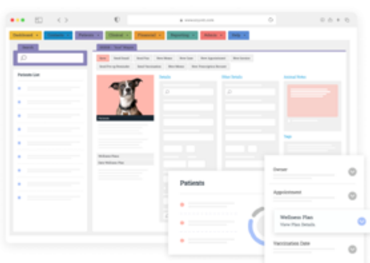
Electronic medical records ease the task of showing unwelcome clients the digital door. With a few clicks, you can easily share their pet's record via email —but filter out any staff notes or alerts before pressing send.

IDEXX Veterinary Software

Trust IDEXX cloud-based veterinary software

Strong communication skills and a well-defined practice culture can help you and your team members successfully navigate difficult client conversations. To help chart your course, trust IDEXX cloud-based veterinary software, which offers an intuitive design and powerful automations that streamline your workflow to help you and your team prioritize client communication and connection—not paperwork.

CONTACT US TO LEARN MORE



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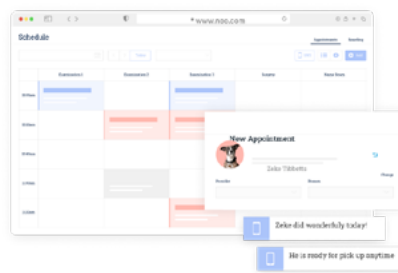

Neo

Even the brightest minds need easy-to-use software.

Neo features a brilliantly simple interface with built-in training tools and streamlined functionality, helping you complete tasks up to 5X faster and reserve brain power for where it's needed most.

Visit: **software.idexx.com**