



Module 2: Professional Service Mastery

Using DISC Profiles and Generational Differences to Create Outstanding Client Service

Welcome and Introduction

This session is the second module in our client service skills series. Building on Module 1, where we explored the importance of making clients feel known and valued, we now shift focus to the 'how' of customizing client service. Today's emphasis is on body language, first impressions, and tailoring communication based on personality and generational traits.

The Role of Body Language and First Impressions

Research shows that 55% of communication is body language. When words and body language conflict, people will always trust the body.

- A genuine smile involves both the mouth and eyes.
- Greetings should feel warm and enthusiastic, not like an interruption.
- Adjust your tone and body language depending on context: empathy for sick pets, compassion for euthanasia cases, or cheerfulness for routine visits.

Even a busy CSR can acknowledge clients with eye contact, a smile, or a wave — reassurance is key.

The Whole Team Creates the Experience

Client service is not limited to CSRs. Every interaction matters:

- Doctors should communicate clearly in layman's terms.
- Technicians can calm pets and reassure owners.
- Assistants should ensure pets return clean and comfortable.

The entire team's effort shapes the client journey. A single lapse can undo positive impressions.

Before the Visit: Setting the Stage

The client journey starts before they step into the hospital. Key touchpoints include:

- Website: Is it easy to navigate, emotional, and user-friendly?
- Phone: Are calls answered promptly? If not, is voicemail clear and helpful?
- Scheduling: Do clients have convenient options (online, phone)?
- Arrival: Parking, signage, and exterior cleanliness set expectations.

The Power of Customization: DISC and Beyond

A one-size-fits-all service model fails to meet individual needs. Tools like DISC and generational profiling help staff adapt.

DISC Profiles

- Driver (D): Results-oriented, direct, decisive.
- Influencer (I): Outgoing, enthusiastic, thrives on connection.
- Steadiness (S): Patient, calm, loyal, values relationships.
- Compliance (C): Detail-oriented, precise, prefers rules and accuracy.

Generational Profiles

We serve clients across all age groups. Recognizing generational traits helps meet them where they are.

Traditionalists (before 1946): Hardworking, loyal, respect authority, less tech-savvy.

Traits:

- Hardworking: Raised by turn-of-the-century farmers, they brought a strong work ethic into the factories. Traditionalists grew up during lean times and consider work a privilege. ---
- Loyal: civic-minded and loyal to their country and employer. Many are members of civic groups like Rotary or Sertoma .
- Submissive: Raised in a paternalistic environment, taught to respect authority. This is why they will often only listen to the Doctors advice rather than any staff member.
- Tech-Challenged: As a whole, they are less technologically adept than the younger generations. This is why we must try to tailor our communication tools to support them. Good client service meets the client where they are – not where we want to force them. The youngest of these is now 80

Baby Boomers (1946–1964): Work-centric, value prestige and quality, strong spending power.

Traits:

- Work-Centric: Baby Boomers are extremely hardworking and motivated by position, perks and prestige. Baby Boomers define themselves by their professional accomplishments. They want to be addressed by their title – Like Dr. Jones or Professor Smith or they want you to be aware of their professional status.
- Shopping Habits: Prefer in-store shopping, value personal service, brand loyalty, and word-of-mouth. They still watch traditional TV so a comment on a network show could be a connection point where they may be lost when you mention a Netflix movie.

-Values: Quality, reliability, and trust established brands. They are less price-sensitive than younger generations. Digital Behavior: Comfortable using email and Facebook, but less likely to be on TikTok. They will text because they have learned that they have to communicate with their kids that way. LOL!

-Spending Power: Control a large portion of disposable income and are willing to spend on health, But – they value the experience so it must be good. Independent Baby Boomers are not afraid of confrontation and will not hesitate to challenge established practices. So don't throw a "its our policy" at them. They believe in "face time" at work and may fault younger generations for working remotely or fussing if their favorite doctor is not working a 50 hour week

Millennials / Generation Y (1981–1996)

Generation Y (Millennials) are an important segment of our client care focus. With numbers estimated as high as 70 million, they represent a vast group with significant pet ownership — about 76% own a pet and most consider them family.

Traits:

- Tech-Savvy: Plugged in 24/7, prefer email and texting over face-to-face.
- Family-Centric: Confident, ambitious, and achievement-oriented.
- Team-Oriented: Value teamwork and inclusion; want to be treated as partners, not just clients.
- Attention-Craving: Seek feedback, reassurance, and transparency in pet care.
- Shopping Habits: Value experiences over possessions; prefer online shopping, subscriptions, and socially responsible brands.
- Values: Authenticity, personalization, and alignment with social/environmental causes.
- Digital Behavior: Heavy users of Instagram, YouTube, and streaming; comfortable with mobile apps and payments.
- Spending Power: Strong but stretched by debt and housing costs; prioritize wellness, experiences, and pet health.

Generation Z (1997–2012)

Generation Z is a growing segment of pet owners. Oldest members are in their late 20s. They were born into technology, holding phones from the start.

Traits:

- Constantly Online: Very short attention spans; require fast-moving, engaging communication (especially video).
- Shopping Habits: Mobile-first, impulse-friendly, influenced by TikTok, Instagram, and peer reviews.
- Values: Diversity, inclusivity, sustainability, and mental health awareness. Expect brands to be authentic and socially responsible.
- Digital Behavior: Heavy consumers of short-form video; expect seamless, instant digital

experiences. Sending video updates on pets is highly effective.

- Spending Power: Still limited but influential; often guide household purchases through research.

Gen Z generally trusts independent businesses more than corporations — unless large corporations demonstrate authenticity, social impact, and 'human' branding.

DISC Personality Styles in Practice

Driver

Drivers are decisive, results-oriented, and fast-paced. They are task-focused, value control, and dislike wasted time. They can appear pushy, dictatorial, or impatient, but they also get things done efficiently. Best communication: direct, concise, and efficient.

Example: A driver client boarding dogs expects quick, no-fuss service. Efficiency creates satisfaction.

Influencer

Influencers thrive on people, energy, and recognition. They are flamboyant, dramatic, and outgoing. They love social interactions and recognition but may lack follow-through and focus. Best communication: fun, engaging, visual, and enthusiastic.

Tip: Don't leave an Influencer isolated; they need interaction like oxygen. Public praise and recognition fuel their loyalty.

Steadiness

Steadiness personalities are calm, kind, and relationship-driven. They value loyalty and harmony, often going out of their way to be liked. They can be indecisive, long-winded, and resistant to conflict. Best communication: casual, sincere, patient listening.

Tip: These clients appreciate compassion and consistency. They are loyal advocates when treated with care.

Compliance

Compliance personalities are analytical, detail-oriented, and precise. They thrive on structure, rules, and accuracy. They dislike surprises and rushed decisions. Best communication: provide details, data, and clear explanations.

Tip: Acknowledge their research and provide reliable resources. Patience and thoroughness create trust.

Why Customization Matters

By tailoring service experiences to personality and generational traits, we create emotionally positive interactions. This reduces stress, increases satisfaction, and generates referrals. Transparency in pricing, genuine appreciation, and consistent communication help offset the unavoidable 'negative' step of paying the bill. Clients who feel valued see themselves as partners in care, not transactions.

The highest compliment is a referral. Personal recommendations signal deep trust and satisfaction. Building a culture of customization, empathy, and respect ensures loyal clients and sustainable practice growth.

Customization in Action: Why It Matters

By customizing a client's service experience, we create an emotionally positive event. Clients who feel understood are more manageable and less stressed. They receive an experience that meets or exceeds their expectations, translating into positive reviews and personal referrals.

The last step of the in-person client journey is often negative — paying the bill. By being transparent with fees and preparing clients ahead of time, we reduce the negative impact. Reconnecting personally at checkout ensures clients leave feeling valued, not like a transaction.

Referrals are the greatest compliment a client can give. They indicate trust and confidence that we will deliver the same high-quality care to their friends and family. In practice, referrals are often more effective than marketing campaigns, as new clients arrive already aligned with our service model.

Understanding both generational and DISC preferences equips veterinary teams to tailor service experiences. It also deepens self-awareness among staff, helping us understand why we connect more easily with some clients than others. Emotional intelligence enables us to adapt responses and work more effectively across client types.

Ultimately, client service excellence lies in recognizing the unique combination of generational influences and personality profiles. By anticipating and adapting to client needs, we reduce conflict, build loyalty, and create trust-based partnerships. That is the heart of great client service.

Key Takeaways

- 1. The client journey starts long before they walk in the door.*
- 2. Body language speaks louder than words.*
- 3. Service excellence is everyone's job, not just the front desk.*
- 4. Customization builds loyalty — DISC and generational insights provide the roadmap.*
- 5. Outstanding service adapts to the person in front of you, not a cookie-cutter script.*