



## Creating a Great First Impression

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### MODULE 1

### Client Service Training

**The front desk role** is a key player in the ultimate success of any veterinary hospital. As a vital member of the client service team, you are the first impression a new client receives of our practice, whether on the phone or in person and that impression must be positive. Being a “nice” person is a good start to CSR success but “nice” is not enough to truly shine in the role. It takes in-depth training to understand what clients seek in their service experience and how to manage with emotional intelligence the often-challenging situations presented at the front desk. This booklet and the accompanying video is designed to support your learning and give you a solid foundation on which to build your veterinary client service career.

## Module 1: Creating a Great First Impression

Speed without appearing impatient is the fine line walked by every great Client Service Representative. The pressure of completing so many important tasks must be balanced with the goal of creating a pleasant human-to-human connection with our clients- and making it all look effortless. Sometimes we feel we need extra hands to manage all the calls, messages, pets and products not to mention the administrative and emotional support duties the job requires. Keeping your cool and remembering your priority list can help.



*Emergency care always is the top of the list. Whether on the phone or walking in the door, everything stops to help a pet in distress. Make sure you understand what Emergent, Urgent or Non-Urgent need is so you can respond appropriately.*

In today’s business market, clients expect rapid response. They are used to having all the information in the world available to them with a few clicks of a button or a voice Google search. Technology has trained our society to be IMPATIENT. So, we have to understand the need for speed when picking up the ringing phone or responding to a client’s request in a timely manner.

Most teams are trained to answer calls by the 3rd ring, but now we need to move even faster because an impatient client, especially a new one who is not bonded to the practice, will quickly lose interest, hang up and call the next place on their Google search list. This diminishes our opportunity to grow our practice and to help an animal. Because of cell towers, clients will often hear a couple of rings off towers before our phone rings even one

time in our practice! On top of this, younger generations of clients HATE to make phone calls and avoid them at all costs, so if they are calling you – *it is important*.

#### A suggested Priority List:



1. Serve the client in front of you if you are in the middle of a transaction. If you are the only CSR available, you may ask the client for permission to answer the phone and then explain to the caller you are helping someone and can be with them shortly. **Do first ask if their pet is in an emergency situation** because that always takes priority. Keep in mind that if you place a caller on hold that call is your responsibility until the client is served.
2. Second priority - The phone. Answer quickly and with a smile, a pleasant greeting and voice tone that always **identifies your practice and gives your name**. It is difficult to build a relationship with someone whose name you do not know. If the caller shares that their pet is ill or they are contemplating euthanasia, you should modify your voice to a tone of concern and compassion.
3. Third priority- The client entering the lobby. If you are on the phone, it is appropriate to smile and wave to acknowledge you have seen the client enter. Never leave people feeling they are in LOBBY LIMBO. This is even more important for new clients who are unfamiliar with your practice and may feel uncomfortable and a little lost until you guide them through the process of check-in.
4. Finally, the client waiting to check out. They have already been served and can see you are tied up. Make sure you are focused on them when you do serve them and **offer them sincere thanks for coming to the practice**. They have many choices, and it is an honor to be chosen to care for their animal family.

## BECOMING A TRUSTED ADVISOR

Making people feel **known and important** is the first step in a great first impression. On the phone we **actively listen** for cues to make a connection. Active listening can be described as intense focus on the person you are working with while not allowing your surroundings or other tasks to distract your attention. Consider your concentration level when playing the children's game "Simon Says". Focus that hard! It makes others feel important and it will help you avoid errors due to lack of concentration.

Clients will often share parts of their day or something important happening in their life with us in conversation. These bits of data are jumping off places to make deeper connections and start building a relationship with the client. Client Service Experts learn to

listen for these tidbits and use them to relate to the client in a more “human” and less transactional way.

For example:

Ms. Smith calls the practice to schedule a vaccination appointment for her dog Jack. In the conversation she mentions she is running errands and trying to gather back to school supplies for her child who is starting kindergarten and that Jack must go to the boarding kennel when they take the last summer vacation next week.



Here we have three good opportunities to make a connection. If you have ever gone through the back-to-school rush you can respond that you have been there and know how stressful that can be. Or, if you have ever taken a child to school on the first day of kindergarten you can express the “parent sadness” of a child growing up and off to school. Finally, you have the opportunity to ask about the last vacation of summer and if they are going somewhere exciting or just planning a laid back and relaxing visit to the beach.

This quick connection only takes a few seconds extra, but it makes a world of difference in the client's perception of how much you care. Typically, busy CSRs jump right into appointment booking while missing the opportunity to make a human-to-human connection.

Usually **when clients become upset with us it is because they perceive we don't care** and only want to push them through our process. When we take a moment to see them as a person it changes how they treat us in return. Research shows that having a quick conversation with a stranger releases endorphins in our brain and makes us happy...not just in the moment, but the good feeling lingers throughout the rest of the day. *Connecting with others brings added joy to our work.*

## Showing Clients Your Confidence and Knowledge

Confident CSRs know practice protocols and can effectively guide clients to getting their pet necessary help. After making a connection it is time to start asking good open-ended questions to discover what the pet's problem could be and how and when we should schedule care. Good questions also help you set the correct amount of time in the appointment scheduler or offer hospital day admission. **Please avoid the term “drop off”** as it diminishes the value of the pet and makes them seem no more important than a bag of dirty laundry. The proper term is “day admission” to the hospital.



Client Service Representatives should always have a list of good open-ended questions to be used to discover a patient's symptoms. If you ever need to “test” your open-ended questions, simply ask yourself – “does this require that the client tell me a story rather than give me a yes or no reply.” Both types of questions are valuable when managing client interactions.

For example: Mrs. Jones calls to tell us that her cat Fluffy is not acting quite right. She is not very clear about “not acting right” so you must do some investigation. A good CSR is part detective! You may ask:

*Mrs. Jones can you describe to me Fluffy' s symptoms? What has changed in her activity level? Is she eating a normal amount of food? Is she still drinking a normal amount of water?*

NOTICE – I didn't ask if she was eating and drinking because most pets, unless they are very ill, will continue both activities to some degree. By asking the client to describe the difference we will get better information and so can be a better Trusted Advisor.

If your inquiry reveals symptoms you are familiar with, then you can knowledgeably guide Mrs. Jones to the appropriate action. Sometimes it seems clients call the practice and want us to talk them out of their concern and tell them they don't need to come. In these cases a good response is,

*“Mrs. Jones, I know you are concerned since you took the time to call. You know Fluffy better than anyone and if you think something is off you are probably right. Let's alleviate your worries and have the doctor find out for sure. If it is nothing serious, that is great news, but I know you don't want to take the risk of it being something major. “*

Sharing stories from another patient who had a “it was a good thing they came in report” is another way to encourage the client to act. Of course, you never share the owner's or pet name – just the story. Statements like “*I understand you are concerned, and I am going to*

*help you get Fluffy taken care of because I agree these symptoms are distressing.”* are also supportive of action.

## PARTNERSHIP



**The duty of the CSR is to advocate for the patient first and foremost and to assist the client in a way that helps them accomplish their goals for their pet.**

The great thing about being a CSR is that clients don't see you as having any ulterior motive to recommend services. CSRs do have the power to completely undermine the recommendations of the doctors if not trained to understand the reason for the tests, services or products they perform and use in practice. Well trained CSRs support the recommendations of the medical team, often by simplifying explanations about care when clients are too uncomfortable asking the doctor for clarification. Your goal is to become the “person on the inside” for your clients. Similar to visiting your favorite coffee shop and having the barista know you and how you take your latte, you become the person the client can count on to have their back when they need support for their pets. This comfort and familiarity give the client a safe feeling that you are a person they can count on and whose advice they can trust.

## THE VALUE OF STORIES

Every superior Client Service Representative needs tools. Earlier you learned about open-ended questions as a valuable tool but even more impactful are stories. You should always keep an ear out for good stories you can use to educate clients about various illnesses and outcomes. Team members should actively share good stories with each other to be used to help inform clients and move them towards the best choice for their pet's health.



Successful patient outcomes certainly boost the confidence of the client in the CSR whose wise recommendations allowed the medical team to solve their pet's problem. Personally, I have had clients thank me for advising them to come in when they were uncertain and it turned out the pet would have suffered if it had not been seen. You can share success stories when clients followed advice, cautionary tales when they didn't, and even stories of clients delaying care and therefore increasing their costs when they finally did come in. All these types of stories are useful as we have conversations with our clients.

Judging clients based on our knowledge base is never fair or appropriate. They don't work in veterinary practices, and they will never see the things we see come in our door. Using stories is the best way to share your knowledge and give clients confidence that you know what is or could be happening with their pet and that you have seen the outcomes.

**NOTE:** My particular pet peeve is dogs riding in the back of pickup trucks – because I have seen the damage caused from a slam of the brakes. I always tried to share this type of story with clients who seemed to prefer to transport their dogs in this manner. The expense of treating a dog with broken bones and road rash is a great cautionary tale.

People tend to follow the path of others. This is why they look at reviews and this is why things become trends. It makes people feel better about their decisions when they know others have made similar decisions and have had successful outcomes. **Stories give clients confidence in your advice.**

Recommended Reading: “Stories That Stick” by Kindra Hall

## MANAGING CLIENT EMOTIONS

**One of the most important facts we must remember is – people love their pets!**

The recent 2025 Synchrony Pet Lifetime of Care Study found both dog and cat owners increasingly view pets as **their family, child or best friend**, indicating a cultural deepening of emotional bonds. So, a visit to the veterinary practice is an emotional time for many clients. Even routine care can cause clients to be stressed about their pet's reaction to vaccinations or reluctance to have an examination. I have certainly had clients say, *“He is going to be so mad at me for bringing him here. He is going to hide under the bed the rest of the day”*.



It is vital that we recognize and offer emotional support to the client. Going back to our active listening skills, we can listen for key words that enlighten us on the owner's feelings. In reply to the comment about the pet being mad, --I would explain to the client that *“pets are often just stressed from seeing strange animals and the smells of the medical environment so when they get home, they often look for a quiet place to decompress. Or they often feel not quite up to par after receiving vaccinations, just like we do when we get*

*our annual flu vaccinations. They aren't mad, they are just not feeling 100% normal. They still love you!"*

You should thank the owners on behalf of the pet for taking such good care. We never want clients to feel guilty about doing the right thing for their pets. Acknowledge the emotion and support the owner as someone who gives good care to their fur family. Just like when we are training a pet to do a trick, we should reward positive client actions. **What gets praised gets repeated.**

## FACE TO FACE IMPRESSIONS

Humans make snap judgements about everything in their environment, and they do this hundreds of times a day. This is necessary for our brain not to be overwhelmed by having to deeply consider whether a place is safe to take a stroll or a person is someone who may be dangerous or even if a blue coat is better than a black one on someone we know. It conserves energy use by our brain, but it also can lead to bias and poor decisions based on stereotypes and false "facts". Knowing this information, you can see how important it is to make a great first impression on clients.

First impressions begin with the presentation of the lobby and entry areas, which are usually the responsibility of the front desk team. It is important to remark on the significance of keeping everything clean, neat, uncluttered and well stocked. Walking into a veterinary practice should not smell like poop and pine cleaner but instead should be pleasant and odor free. Quickly cleaning pet accidents and spraying to eliminate the smell should be a practice protocol with supplies easily available for the team to use. Monitor the sidewalks and entry areas for urine, feces and check the glass doors for slobber and nose prints. Our first impression needs to be "this hospital is CLEAN".



Which hospital would YOU pick?!

The desk area should also be kept free of clutter and well organized. Clients will peruse the area as they linger there upon check-in and check-out. They should not see food, drinks, cell phones, toiletries or other non-business items. Limit the number of brochure stands, handouts, etc. to those you will actively hand to clients. Too many clutter the area and just mean nothing is important.

In client surveys I have performed in the past, “cleanliness” was the third most important reason they came to our practice. This ranked behind the first reason – *they care for me and my pet*- and the second reason – *they practice quality medicine*. **Clean matters in animal health as much as in human health** and just because we work in an animal hospital there is no reason to lower standards of cleanliness.

Most of the advice for connecting with phone callers can be utilized with face-to-face client encounters.

**When clients walk in, they should be instantly acknowledged and greeted.** A pleasant, “Good Morning!” followed by “is this Scarlette?” if you recognize the pet, or a “Hi Ms. Jones, I think we spoke earlier this morning!” if you know the client, makes a great first impression.

Recognizing the client, unless they are well known, isn’t always possible, but knowing which animal is on the books for the next few appointments and then putting the puzzle pieces together that *Mrs. Jones and her merle Frenchy Scarlette are supposed to be here at 10:30 – now I am prepared to call Mrs. Jones by name when she comes in at 10:15*. This is a great way to make clients feel special. So many times, I encountered my clients in the grocery store only to forget their name, but I almost always knew their pet and could save myself with a “how is Pumpkin feeling?” **People love to hear their own name but in our world the pet’s name is also a winner.**

Great first impressions are also compounded when the Client Service Representative is confident and can knowledgeably guide the client to success. For example, a client comes in for a few routine vaccinations and you see that it would be helpful to them to have their  pet on Wellhaven’s wellness plan, so you offer the opportunity to the client, sharing how it can financially ease the burden of the pet’s routine medical needs. People are impressed when they see we are trying to be helpful.

Here is another first impression fact. **If you make a bad first impression it can take as many as 3 years to overcome** with subsequent good impressions...if you get a second chance. Many clients who are not impressed simply do not return.

## PERSONAL APPEARANCE

Most managers have had uncomfortable conversations with staff members about inappropriate personal appearance or body odors. No one likes to have these conversations but since impressions are so important and the CSR team is the first and last person a client encounters in the practice, it is essential that you are aware of how you present yourself to the public.



It is true that people dress more for comfort than fashion these days, but comfort doesn't mean wrinkled, smelly, torn, too tight or dragging the ground. Once again, being neat and clean are valued by clients and looking well put together leaves a positive impression of both you and your practice.

- Cloths should be clean and wrinkle free, mended if torn and fit so as to not reveal undergarments when bending or leaning over. Shoes should be clean. Hair should be washed and neatly styled. Makeup should be appropriate for a work environment. Keep a mirror available to check your clothing for soiling. Lint rollers should be available to keep fur at bay.
- Smokers should be highly aware that smoke gets trapped in clothes and hair and prepare to spray both after smoking.
- Keep clothes washed and fresh as neither your clients nor your coworkers want to be subjected to body odors.
- Be aware of eating foods that cause bad breath and either avoid them when on duty or use mouthwash or mints to tame dragon breath.
- Excessively long nails may be fashionable but remember that you are working in a hospital. The AVMA has a study that recommends no more than fingertip length due to trapped bacteria under long nails. This matters even more if you are cross trained.
- Name tags are vital to making good connections with clients and they allow clients to share complements about you to others and to learn your name. They should be worn on the right shoulder so if you shake hands with someone their eyes can travel up your arm and not across your chest to read it.
- Body odor is one thing obvious to avoid but also keep perfumes to a minimum. Many people have perfume allergies, giving them severe headaches or upper respiratory reactions. Our goal is to make our clients comfortable and not cause them problems. Keep perfumes for other times.
- Gum chewing can be helpful to keep your mouth moist and breath fresh but be highly aware of how and when you chew it. Clients should never see gum smacking,

bubble blowing or chewing like a cow with a cud when they look at you. None of these makes you look smart. The safest bet is to just not chew gum at the front desk.

**CSR's have so much influence on how the practice is perceived.** They also are a key to encouraging client visits and building a successful business that can afford to care for its patients with quality equipment and its team with excellent pay and benefits. Your role is vital to ensure animals get timely and needed care so never think for a moment you are not valuable or important. Without you encouraging clients to come, none of the medical team gets to use their skills and talents. **You** set the tone for every client visit with a positive or negative start that follows them through their journey in the practice, and **you** leave the last positive or negative impression when they leave.

Throughout your workday clients and other team members are watching your actions just as if you were on stage. Make sure you give a stellar performance like the star you are!

