

Mississippi Valley Veterinary Medical Association



**Mark Opperman, CVPM
Sheila Roe Grosdidier, RVT, PHR**

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AGENDA

7:30 am – 8:15 am	Registration & Continental Breakfast
8:15 am – 10:30 am	How to Hire, Train, and Discharge Employees
10:30 am – 11:30 am	Financial Management: What to Look For and What to Do About It
11:30 am – 1:00 pm	Lunch Break
1:00 pm – 2:00 pm	How to Control Your Inventory and Support Staff Costs
2:00 pm – 2:30 pm	Break
2:30 pm – 3:30 pm	Income Harvest: Pick Low Hanging Fruit
3:30 pm – 4:00 pm	Conclusion and Additional Q & A

Speaker Biographies

Mark Opperman, CVPM



Mark has been actively involved in the field of veterinary practice management for over 30 years. During this time, he has consulted with over 1200 veterinary hospitals throughout North America and has lectured extensively within the United States, Canada, Europe and Asia. Mr. Opperman served as the president of the Veterinary Hospital Manager's Association for 11 years. As a recognized authority in his field, he served as hospital management editor for *Veterinary Economics*. He received a lifetime achievement award in 2000 from the VHMA and has been named "Speaker of the Year" by the North American Veterinary Conference. Mr. Opperman is also the author of *The Art of Veterinary Practice Management*.

Sheila Roe Grosdidier, BS, RVT, PHR



Sheila has over 20 years of experience in the field of veterinary medicine. Ms. Grosdidier is a Certified Administrator for Unix and Windows, and she earned her Professional in Human Resources (PHR) designation which allows her to be an excellent guide through the intricacies of personnel management. Additionally, Sheila's strong skills in staff training and adult education help clients experience enhanced profitability through staff leveraging. She has thrice been named "Speaker of the Year" by the North American Veterinary Conference.

Read more at www.vmc-inc.com

Suggestion List

Name _____ Date _____

Practice Name _____

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Priority List

Name _____ Date _____

Practice Name _____

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Mississippi Valley Veterinary Medical Association



SECTION I

Hiring, Training, & Discharging Employees

Hiring, Training & Discharging Employees

- I. Learn How to Hire “10” Employees
 - A. Creating a resource pool of applicants
 - B. Understand the responsibilities and functions of all individuals employed in your practice
 - C. Initial Interview
 - 1. Atmosphere
 - 2. Overall impression
 - 3. Match candidate to position – qualifications
 - 4. Job descriptions
 - D. Second interview
 - 1. In-depth
 - 2. Interview report form
 - 3. Tour of Practice – *observe responses*
 - E. Job Try-out
 - 1. Purpose
 - 2. Release form
- II. Training Employees
 - A. How to recognize a potentially great staff
 - B. Job descriptions
 - C. Orienting new employees
 - 1. Assign to training nurse or supervisor
 - 2. Ten recommendations for training new staff members
 - D. Develop a timetable
 - 1. Receptionist training schedule
 - 2. Slowly expand a new employee’s responsibilities
 - E. Employee performance evaluations
 - 1. Employee incentive program
 - F. Continuing education
- III. Motivation
 - A. Understand why individuals work for us
 - B. Motivational theory
 - 1. Common sense

2. Positive reinforcement
3. Negative reinforcement
4. Your management style

a) What is your leadership style?

C. Practice identity

1. Uniforms
2. Nametags
3. Hospital functions
4. Staff meetings

a) Attitudes to improve staff meetings

D. Is money a motivator?

E. Job enrichment

F. Introducing new projects

1. Identify who in the practice is best suited
2. Initial meeting – review project
3. Research project
4. Second meeting – review research, incorporate employees' ideas, be open-minded
5. Start project – employee to manage
6. Monitor new project

G. The little things in life count the most

1. Take an employee to lunch
2. Give bonuses for exceptional work
3. Buy flowers or wine
4. Thank you!

H. Do you know what job features your employees rank number one?

1. How to get the most from your staff

IV. Employee Handbook

- A. Provides direction, a feeling of belonging and a sense of importance
- B. Informs about practice policies and procedures
- C. Informs new employee(s) about the practice
- D. Explains goals of practice
- E. Should include policies on:
 1. Probation or introductory period
 2. Vacation time

3. Sick time
4. Holidays
5. Insurance
6. Employee reviews
7. Uniforms
8. Scheduling
9. Honesty

V. Scheduling of Employees

A. Cost-effective scheduling

1. Laboratory hours
2. Admission/discharge hours
3. Radiology and Surgery scheduling

B. Utilization of part-time vs. full-time employees

VI. Firing

A. Make a decision and act upon it – do not procrastinate – indecision is detrimental to you and to your practice

B. Document your employee's actions – Amsterdam Forms

C. Atmosphere in which to conduct discharge

D. State practice's position and factual evidence

E. Approaches:

1. Try to present so employee realizes he/she would be better suited in another position
2. Direct approach

F. Do not keep a discharged employee in the practice

G. Exit interview

1. Questions to be asked during an exit interview

VII. Fear of Failure: *How to recognize it and what to do about it*

VIII. How to Become an Effective Employer



— JOB DESCRIPTION —

RECEPTIONIST

INTRODUCTION

The purpose of this position is to serve as receptionist at [Practice Name], to perform record keeping duties, to perform clerical duties related to patient care and treatment, and to provide miscellaneous support to the veterinary practice manager and health care team. These service functions include, but are not limited to, reception (visitor and telephone), maintenance of veterinary medical records, accounts maintenance, cash processing, data entry, word processing and mail service. This position requires a practical knowledge of hospital organization and services, the basic rules and regulations governing visitors and animal patient treatment, data transcribing, word processing, and a practical knowledge of the standard procedures, veterinary records and terminology used in the hospital.

PRIMARY JOB RESPONSIBILITIES

- Provide friendly, quality client care to the patients and clients of [Practice Name].
- Receive incoming calls, screen those that are handled by other health care team members and take care of routine calls. The routine calls include those seeking information about veterinary services ("telephone shoppers"). Provide knowledgeable sub-professional advice concerning the care and treatment of animals.
- Follow established hospital policies and procedures in referring clients for immediate treatment of their pets when requests are accompanied by complaints of acute symptoms. Determine nature of injury/illness and attempt to reassure distressed pet owners. Determine whether immunizations and/or tests are current. Recommend update of necessary immunizations and/or tests to clients when applicable.
- Schedule appointments, obtaining all necessary data concerning the patient and owner. Prepare all required forms in advance when possible.
- Prepare to receive appointments by retrieving client records, preparing needed forms in advance of clients' arrival. Complete required forms such as new client form, patient visit form, client report, consent forms, estimates, payment agreements, etc and obtain all necessary information.
- Check clients in - Greet clients in a professional, friendly, hospitable manner.
- Discharge patients. Review charts of patients being discharged from the clinic for completeness of information, make new appointments or note changes in patient status as necessary. Enter charges and set up future reminders in system. Present clients with medications, instruction.
- Assure that all financial obligations are met by owners. Collect client fees, make change, process credit card transactions and assist in making count of cash drawer, run end of day transactions.
- Perform over-the-counter selling of specialty merchandise comprised of pet grooming aids and sundry veterinary items. Exercise technical knowledge of products sold and demonstrate salesmanship abilities. Explain and demonstrate products, answer questions concerning products purchase/ use.

- Fill veterinary prescriptions with appropriate medication; provide routine instructions to owners concerning prescriptions for medications.
- Collect lab specimens from pet owners, match patient record to the sample and submit samples to veterinary technician or nurse.
- Assist in the updating of client files; prepare and mail thank you cards and “welcome aboard” cards, reminders. Follow-up with clients when clinic records indicate no recent visits.
- As required, enter data into the computer system, retrieve and modify computerized records. The practice management software includes, but is not limited to, such areas as reminder list of patients for periodic notifications, receipt and/or invoicing to update medical/financial records; accounting to include the general ledger, accounts payable, accounts receivable, billing and aging of accounts, income distribution, inventory control, client records, pet records, medical records, payroll; word processing to produce letters for general correspondence and special mailings to clients, etc.
- Perform a variety of clerical duties, receiving, sorting, distributing mail, sending out mailings, cleaning, organizing reception area, type memos, correspondence, reports and other documents. Assist in the ordering, receiving, stocking and distribution of supplies.
- Work well with all employees and ensure that your actions support the hospital, the doctors, and the practice philosophy.
- Perform other duties as assigned.

CONTROLS OVER WORK

The receptionist works under the direct supervision of the receptionist team leader/office manager and/or veterinary practice manager, who will indicate general assignments, limitations and priorities. Recurring assignments are performed independently. Deviations or unfamiliar situations are referred to the supervisor. Completed work is reviewed for technical accuracy and compliance with established procedures.

SKILLS AND KNOWLEDGE

- Possession of strong organizational skills.
- Excellent verbal and written communication skills. Possess exceptional interpersonal communication skills.
- Knowledge of hospital procedures and operating instructions for making appointments, assembling patient medical records, recording test results, relaying information regarding patient’s condition, and compiling and submitting data on patients treated.
- Knowledge of the spelling and meaning of commonly used terminology of veterinary medicine to accurately record results of tests and file veterinary medical reports according to alpha, numeric or subject matter headings.
- Requires strong client service skills. Personal contacts are with pet owners affected by a variety of problems, visitors and other healthcare team members. Considerable tact and diplomacy is required. Must accurately relay owner’s account of the medical complaint(s) of the pet(s) involved to the healthcare team member who will be involved in treating the patient(s).

- Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
- Ability to work independently on assigned tasks as well as to accept direction on given assignments.
- Knowledge of computers and relevant software applications including MS Office (Word).

PHYSICAL EFFORT

The physical demands described here are representative of those that must be met by an employee to successfully perform the primary functions of this job.

- Frequently position self and move about the reception area to file, use office machinery such as fax machines and computer, and assist clients with merchandise.
- Frequently transports inventory to stock shelves. Frequently handling 30 pounds and occasionally handling 50 pounds.
- Often transports patients to weigh on scales.
- Frequently required to communicate with clients, team members and associates. Must be able to exchange accurate information.

WORK ENVIRONMENT

While performing the duties of this job, the employee is exposed to hazards associated with aggressive patients; hazards associated with infected animals and controlled substances; exposure to unpleasant odors and noises; exposure to bites, scratches and animal wastes; possible exposure to contagious diseases.

Note: When duties and responsibilities change, job description will be reviewed and subject to changes of business necessity.

ESSENTIAL FUNCTIONS:

- Professionally administer all phone calls - answering client inquiries in a prompt and friendly manner, scheduling appointments, recording messages.
- Requires strong communication and client service skills. Considerable tact and diplomacy is required. Ability to greet clients in a professional, friendly, hospitable manner - check clients in, discharge patients.
- Collect client fees, post and record payments, make change, process credit card transactions and run end of day transactions.
- Input data into computer software system.
- Open and close practice.
- Perform a variety of clerical duties, mailings, cleaning, organizing reception area, type memos, correspondence, reports and other documents.
- Ability to multi-task.
- Regular attendance and timeliness are an essential function in order to fulfill the requirements of this position.
- Perform general physical activities that require bending, standing, stooping, moving from room to room, sit, talk, and listen; may be required to walk or stand for long periods of time; will use hands to manipulate, handle, or feel; will reach with hands and arms.



RECEPTIONIST PHASED TRAINING PROGRAM

Employee (Trainee) Name _____ Hire Date _____

Purpose: The purpose of this program is to introduce the Receptionist to the practice and bring them into the hospital's philosophy of care and service. Through this program, the new Receptionist will become familiar with the day-to-day operations, management, and standards of care within our hospital

Although a probable duration is stated for each phase of training, these are meant only as a guide and neither the trainer nor the trainee should sign off on a phase until they feel that they fully understand and are comfortable performing all the job tasks listed.

Phase I - Welcome to Our Practice!

Probable Duration: One Day

Skill/ Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials
Parking		Show employee parking area.		
Personal Storage		Provide employee with personal storage space. Discuss protection of personal property at work		
Hospital Orientation and Tour		<u>Orientation</u> - Provide a detailed hospital tour which points out emergency exits, eye wash station, employee restrooms and employee break room. Identify the exam rooms, kennel, surgery/treatment area, pharmacy, radiology, etc. and what each area is used for.		
Introductions		Introduce employee to doctors and other healthcare team members. Identify trainee's immediate supervisor.		
Required Forms		<u>Complete Required Forms</u> <ul style="list-style-type: none"><input type="checkbox"/> W-2 form<input type="checkbox"/> I-9 form<input type="checkbox"/> Verify Social Security card & driver's license as required by I-9<input type="checkbox"/> Complete all required new-hire forms<input type="checkbox"/> Other <p>_____ (Note: All forms are to be kept in confidential personnel file, under lock and key. All current I-9 forms should be kept in a separate file under lock and key).</p>		
Notebook		Give new team member an empty notebook for training notes.		

Skill/ Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials
Job Description		<ul style="list-style-type: none"> <input type="checkbox"/> Present employee with Receptionist job description. <input type="checkbox"/> Review general expectations for the position, as well as protocol for annual review. <input type="checkbox"/> Present employee with a blank performance evaluation form <input type="checkbox"/> Review the hospital's management structure (i.e. hierarchy of authority) <input type="checkbox"/> Review the receptionist duties to be completed daily 		
Hospital Procedures Manual		Present employee with hospital procedures manual. Make sure the At-Will Employment acknowledgement and acknowledgement that manual has been reviewed and read forms are signed by the employee and placed in their personnel file.		
Benefits		Review benefits and effective dates.		
Phased Training Program		Present employee with a copy of the phased training program. Explain protocol (<i>trainee to sign off on each phase, trainee to ask if has questions</i>).		
Time clock and Employee Schedules		<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrate operation of time clock. Explain procedure for clocking in/out. <input type="checkbox"/> Discuss timelines and attendance expectations <input type="checkbox"/> Show employee the proper protocol for submitting a request for days off form and how work schedules are presented and posted. 		
OSHA Training		Conduct OSHA training. Explain OSHA standards, MSDS sheets, etc. Give employee handout regarding safety and complete OSHA test. Inform team member what they are to do if an OSHA officer shows up and ask for a tour of the practice. Make sure they know the practice OSHA safety officer's/coordinator's name		
Uniforms		Present team member with uniform. Review hospital dress standards.		
Observe Position		Trainee to observe (senior) receptionist. (1 hour)		

Telephone Procedures		<p>Show proper way to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Answer phone, <input type="checkbox"/> Take messages <input type="checkbox"/> Place callers on hold <input type="checkbox"/> Route messages to doctors and other team members <p>Watch LifeLearn training CD “Enhancing your Telephone Skills.” Note to practice: This CD can be purchased at www.lifelearn.com</p>		
Basic Animal Handling		Learn basic animal handling principles. Before signing off, trainee must demonstrate proper animal handling with at least two patients.		
Conclusion of Phase I		Review of Phase I of training program. Trainee is asked if he/she has any questions or needs further training on any part of Phase I. Trainee signs off on Phase I.		

Phase I of Training Complete

My signature below signifies that I have completed Phase I of the Receptionist Phased Training Program and that I fully understand all concepts covered and I am comfortable in my knowledge and ability to perform the procedures introduced in Phase I of this program.

Employee (Trainee)

Date

Phase II

Probable Duration: One Week

Skill/ Knowledge	Trainer	Description	Date Training Completed	Trainer's Initials
Reference Materials		Present trainee with materials to review. <ul style="list-style-type: none"><input type="checkbox"/> Present Trainee with the Common Medical Terminology handout.<input type="checkbox"/> Other client education materials<input type="checkbox"/> Other _____		
Review Materials		Review: <ul style="list-style-type: none"><input type="checkbox"/> Review above presented materials with trainee<input type="checkbox"/> Other _____		
Scheduling		Explain: <ul style="list-style-type: none"><input type="checkbox"/> Basic appointment scheduling procedures.<input type="checkbox"/> Scheduling guidelines and special circumstances (heartworm season, etc.).<input type="checkbox"/> Fecal test		
Logging On/Off		Demonstrate how to log on and off the computer properly. <ul style="list-style-type: none"><input type="checkbox"/> Review company policy regarding computer use and password maintenance/usage.		
Software		Complete veterinary software training module		
Greeting Clients		Explain the proper way clients and their pets are to be greeted and treated when they come to the practice.		
Obtain client information		Review obtaining all necessary data from clients to prepare forms i.e. new clients, consent forms, medical care plans (ie, estimates).		
Obtaining a Weight		Demonstrate how to obtain a weight on a pet.		
Wait time		Demonstrate how to handle situations where there is an extended wait		
Alert Assistant About Visit		Explain outpatient protocol -- the assistant is to be alerted that the client and patient are ready.		
Controlling Odors		Explain procedure for controlling odors and maintaining a neat and tidy front desk. Discuss danger in using bleach and that bleach should NEVER be mixed with ammonia.		

Skill/ Knowledge	Trainer	Description	Date Training Completed	Trainer's Initials
Noise Pollution		Explain procedure for minimizing noise pollution. (e.g. barking dogs are escorted to a private area or an exam room) Explain proper use of ear plugs.		
Pulling Forms		Show how to retrieve forms & the filing/computer system. Before signing off, trainee must demonstrate the ability to properly handle.		
Checklist		Demonstrate how to use and/or create a checklist.		
Messages		Review the proper way to answer the phone and take messages.		
Confirmation Calls		Explain procedure of calling clients the day before their appointments to confirm their appointment.		
Surgery Quotes		Explain the proper procedure for quoting surgery prices.		
Medical Care Plan Book		Demonstrate how to use the Medical Care Plan Book and the appropriate way to go over a medical care plan.		
Fax, Copier, Phone System		Demonstrate the use of necessary office equipment.		
Mail		Explain how to take out and pick up the mail.		
Vaccination Due Dates		Explain how to check vaccination due dates. Before signing off, trainee must demonstrate the ability to handle this task properly.		
Conclusion of Phase II		Review of Phase II of training program. Trainee is asked if he or she has any questions or needs further training on any part of Phase II. Trainee signs off on Phase II.		

Trainee Comments - Phase II

Use this area for any comments you have concerning this phase of your training. This will help us to improve our training systems and ensure that adequate training is provided to you. Your comments will be read by the management of the practice and kept in your confidential employee file.

Phase II of Training Complete

My signature below signifies that I have completed Phase II of the Receptionist Phased Training Program and that I fully understand all concepts covered and I am comfortable in my knowledge and ability to perform the procedures introduced in Phase II of this program.

Employee (Trainee)

Date

Phase III

Probable Duration: One Week

Skill/ Knowledge	Trainer	Description	Date Training Completed	Trainer's Initials
New Client Adding		Demonstrate how to add a new client.		
Entering Charges		Demonstrate the correct procedure for entering charges into the computer. Before signing off, trainee must demonstrate the ability to correctly enter charges.		
Payments from Clients		Explain the process of accepting payment from clients <ul style="list-style-type: none"><input type="checkbox"/> Credit cards<input type="checkbox"/> Cash<input type="checkbox"/> Check<input type="checkbox"/> Care Credit		
Charge List		Demonstrate how to print a list of charges.		
Team Meetings		Review recent team meeting minutes and the protocol for reviewing minutes if employee is unable to attend a meeting.		
Hospital Tours		Explain protocol for client tours or when clients are allowed to visit patients in boarding or the hospital.		
Treatment Board		Demonstrate how to properly use the treatment board.		
Contagious Soak		Demonstrate the procedures followed for a contagious soak.		
Vaccine Protocol		Demonstrate a working knowledge of vaccine protocol.		
Appointment Scheduling		Demonstrate basic appointment scheduling.		
Surgery Appointment Scheduling		Demonstrate the ability to schedule surgery appointments.		
Hospital Organization		Explain the organization of the hospital and workflow.		
Surgery Forms		Demonstrate how to correctly fill out surgery forms.		
Collect laboratory specimen		Collect laboratory specimens from pet owners: <ul style="list-style-type: none"><input type="checkbox"/> Match patient record to the sample<input type="checkbox"/> Submit the samples to veterinary technician or nurse<input type="checkbox"/> Present clients with medications and routine instructions		

Assign Bloodwork (Outside Lab)		Demonstrate the proper way to assign bloodwork to an outside laboratory. The trainee must demonstrate the ability to handle this task properly.		
Assign Bloodwork (In-house)		Demonstrate the proper way to assign bloodwork within the practice. Before signing off, trainee must demonstrate the ability to handle this task properly.		
Outside Labs		Explain the procedure for calling outside laboratories.		
Communicate with Clients		Learn hospital guidelines for communicating with clients in different types of situations such as general queries, scheduling appointments, routine and non-routine medical questions, patient emergencies, prescription refills		
Medical Recalls		Demonstrate the procedure to follow when recalling clients. Before signing off, trainee must demonstrate the ability to handle this task properly.		
Cleaning Exam Rooms		Explain how to properly clean and disinfect an examination room.		
Boarding Slips		Show how to complete a boarding slip.		
Boarding Reservation		Explain how to make a boarding reservation.		
Cancel Boarding Reservations		Demonstrate the ability to properly cancel a boarding reservation.		
Admitting Boarders		Demonstrate the correct procedure to follow when admitting boarders. Before signing off, trainee must demonstrate the ability to handle this task properly.		
End of Life Appointments		Explain how end of life appointments are scheduled and how greeter should anticipate and prepare for these types of appointments.		
Receipting Out		Demonstrate how to check-out a client <ul style="list-style-type: none"> <input type="checkbox"/> Review charts for completeness <input type="checkbox"/> Make new appointments <input type="checkbox"/> Note changes in patient status <input type="checkbox"/> Enter future reminders 		
Marketing		Discuss marketing to clients <ul style="list-style-type: none"> <input type="checkbox"/> Discuss how to promote the practices products, programs and services. <input type="checkbox"/> Explain the use of passive marketing <input type="checkbox"/> Ensure that employee gains a technical knowledge of products sold 		
Conclusion of Phase III		Review of Phase III of training program. Trainee is asked if he or she has any questions or needs further training on any part of Phase III. Trainee signs off on Phase III.		

Trainee Comments - Phase III

Use this area for any comments you have concerning this phase of your training. This will help us to improve our training systems and ensure that adequate training is provided to you. Your comments will be read by the management of the practice and kept in your confidential employee file.

Phase III of Training Complete

My signature below signifies that I have completed Phase III of the Receptionist Phased Training Program and that I fully understand all concepts covered and I am comfortable in my knowledge and ability to perform the procedures introduced in Phase III of this program.

Employee (Trainee)

Date

Phase IV

Probable Duration: One Week

Skill/ Knowledge	Trainer	Description	Date Training Completed	Trainer's Initials
Opening		Demonstrate the procedure for opening the hospital		
Closing		Demonstrate the procedure for closing the hospital		
Surgical Charges		Demonstrate how to check surgical charges. Review the travel sheet. All services rendered should be highlighted.		
Price Quotes		Explain how and when the Trainee is to quote prices.		
Client Transaction Reports		Demonstrate how to prepare a Client Transaction Report.		
Vaccination Protocol Handout		Present trainee with vaccination protocol handout and explain how to use.		
Correspondence		Demonstrate how to communicate with clients regarding medical status, medical instruction, itemize and review the client statement, inform clients about hospital policies, payment and credit policies		
Print Correspondence		Demonstrate how to print client correspondence i.e. reminders, thank you notes, new client letters		
Bank Deposits		Explain how to prepare the bank deposit and complete the deposit slip.		
Credit Cards		Explain the correct procedure to follow when batching credit cards.		
End of Day		Explain the End of Day procedures. Before signing off, trainee must demonstrate the understanding of this task.		
Returning Products		Demonstrate the correct procedure to handle returns.		
Coupons		Explain how to handle coupons.		
Bounced Checks		Explain the procedure to follow when a check bounces.		
Accounts Receivable		Explain the procedure for handling accounts receivable issues.		

Skill/ Knowledge	Trainer	Description	Date Training Completed	Trainer's Initials
After Hours ER Fee		Explain the after hour's emergency fees.		
Prescription Filing		Demonstrate how to correctly fill a prescription and the expectation that all prescriptions should be proofed.		
Controlled Substances		Demonstrate the correct procedure used when dispensing controlled substances.		
Recognizing an Emergency		Discuss referring clients for immediate treatment of their pets when the requests are accompanied by complaints of acute symptoms		
Heartworm Testing & Prevention		Explain the practice's philosophy and established protocol for heartworm testing and prevention.		
Flea Prevention 101		Explain basic flea prevention protocol.		
Client Complaints		Explain the procedure for handling client complaints.		
Displays and Retail		Explain how to restock and arrange the retail and point of purchase display areas		
Refreshment Area		Demonstrate how to restock and maintain the refreshment area		
Office Supplies		Explain the protocol for ordering inventory and office supplies		
Clean Front Area		Demonstrate how the front desk and printer should be cleaned.		
When In Doubt		Assure the employee that whenever he or she is in doubt or needs help, they are expected to seek assistance and guidance.		
Conclusion of Phase IV		Review of Phase IV of training program. Trainee is asked if he or she has any questions or needs further training on any part of Phase IV. Trainee signs off on Phase IV.		

Trainee Comments - Phase IV

Use this area for any comments you have concerning this phase of your training. This will help us to improve our training systems and ensure that adequate training is provided to you. Your comments will be read by the management of the practice and kept in your confidential employee file.

Phase IV of Training Complete

My signature below signifies that I have completed Phase IV of the Receptionist Phased Training Program and that I fully understand all concepts covered and I am comfortable in my knowledge and ability to perform the procedures introduced in Phase IV of this program.

Employee (Trainee) *Date*



RECEPTIONIST PERFORMANCE EVALUATION

Name: _____ Date: _____
Date of last review: _____ Date of Employment: _____
Person preparing review: _____

RATING GUIDE

Excellent - Almost always exceeds expectations; quality of work is highest caliber; greatly exceeds required job criteria.	9-10 points
Very Good - Performance almost always meets expectations and exceeds expectations on occasion; always above average work; fulfills job criteria very well; <i>requires minimal supervision</i> .	7-8 points
Adequate - Performs to expectations most of the time; satisfactory most of the time; fulfills job criteria adequately.	5-6 points
Needs Improvement - Does not perform to expectations; satisfactory only on occasion; significant improvement should be achieved to fulfill job criteria; <i>requires more than normal amount of supervision</i> .	3-4 points
Unsatisfactory - Almost never performs as expected; lacks any proficiency; major improvement is required in order to fulfill job criteria. <i>If improvement is not met in specified time period, job termination may result.</i>	0-2 points

JOB SKILLS

RATING

Job Knowledge: Possesses knowledge to perform assigned duties.	
Quality: Demonstrates accuracy, thoroughness, and dependability.	
Initiative: Seeks out new assignments and responsibility. Assists in identifying and solving various problems related to how the hospital is run. Brings ideas to the supervisor. The team member searches out new tasks and expands his/her abilities professionally and personally.	
Attendance: Demonstrates punctuality and dependability. Is consistently on time for all work periods and returning from breaks. Works scheduled hours and is rarely absent. Clocks in and out appropriately.	
Judgement: Able to discern when a pet should be seen and when verbal information will solve the problem.	
Appearance: Presents self as professional and dress reflects that presentation to clients. Is always clean and well groomed and wears appropriate uniform/clothing in accordance with job requirements.	
Productivity: Is able to perform the job on a needed basis (i.e. phones, clients). Performs clerical tasks, mailing, organizing reception area, cleaning.	
Client Communications: Actively listens. Able to express thoughts so the client understands the recommendations. Has considerable tact and diplomacy.	
Empathy: Shows empathy towards clients and their pets.	

Record Keeping: Records patient and client information properly in the records.	
Marketing: Gives the client options as to what is available for the pet and gives adequate information on products.	
Telephone Skills: Answers the phone quickly and politely. Shows ability to verbalize and communicate thoughts. Skillfully answers telephone shopper inquiries following the hospital procedures for phone shoppers. Screens calls and appropriately directs communication to the proper team member or veterinarian.	
Client Complaints: Possesses strong client service skills. Able to maintain a professional manner when dealing with a complaint or problem.	
Attention to Detail: Completes tasks once started. Completes office duties. Maintains appointment book. Demonstrates accuracy, thoroughness, neatness and dependability.	
Veterinary Knowledge: Possesses knowledge to basic medical and surgical conditions needed to convey information to the client and educate the client on preventative care.	
Computer Competency: Is proficient in handling the various computer operations required on a daily basis. Is able to follow directions on use, back-up, and trouble-shooting. Enters information accurately. Runs reports, retrieves information, and updates client records timely and accurately.	
Teamwork: Works well with all team members and ensure that your actions support the hospital, the doctors and the practice philosophy.	
Hospital Procedures: Follows hospital policies regarding patient admittance, immunizations, discharges, etc. Provides proper instructions, medications and enters reminders into the system.	
Cash management: Accurately collect client fees, post and record payments, make change, process credit card transactions and run end of day transactions.	
Autonomy: The team member works independently on assigned tasks as well as accepts direction on given assignments.	

OVERALL RATING _____

TOTAL POINTS _____

Comments/Recommendations/Goals to Attain

This individual has demonstrated positive performance of growth and development in the following areas:

Areas where improvement in performance and effectiveness can be shown by this individual:

Additional Comments:

Future Goals for Employee:

My employer and/or supervisor has reviewed this evaluation with me. I understand the criteria on which I have been judged and my reviewer has discussed my goals for the future.

Employee Signature: _____ Date: _____

I have completely reviewed this evaluation with my employee.

Supervisor Signature: _____ Date: _____

Employer Signature: _____ Date: _____

Mississippi Valley Veterinary Medical Association



SECTION II

Financial Management: *What to Look For & What to Do About It*

Financial Management: What to Look For and What to Do About It

I. What Are Your Practice's Pulse Points? — Scoreboard Your Practice

A. Revenue Overall Hospital

1. Monthly Sales
2. New Clients
3. Number of Invoices
4. Average per invoice (ACT)

B. Develop Doctor Production Report

1. Monthly Sales
2. Number of invoices generated
3. Average client charge (ACT)

C. All information should be benchmarked

1. This month / Last month
2. This year / Last year

D. All information should be compared with industry standards

1. Industry standards per full-time equivalent DVM for overall hospital invoices
 - a. Monthly sales - \$51,000
 - b. Number of invoices – 460 per month or 5,528 per year
 - c. ACT - \$107 - \$110
2. Industry standards per full-time equivalent DVM for DVM professional services
 - a. Monthly sales - \$45,616
 - b. Number of invoices – 251 per month or 3,021 per year
 - c. ACT - \$167
3. Average number of new patients per full-time equivalent doctor
 - a. 30 per month or 357 per year
4. Average number of active clients per full-time equivalent doctor
 - a. 1,544

E. How do you increase the average invoice?

1. Charge for what you do
2. Institute controls to make sure all charges are billed
3. Review pricing structures and product mark-ups
4. Review discount policies
5. Excel at client education to market existing and new services

II. Look for Strengths and Weaknesses Within the Income Areas of Your Practice

- A. Comprehensive Physical Exam
- B. Wellness Comprehensive Physical Exam
- C. Items to Consider

1. Hospital Services

- a. Are surgeries and anesthesia procedures timed and billed appropriately?
- b. Are medical care plans being used?

2. Current Trends in Revenues of Most Hospitals

MEDICAL SERVICES		% of Total Revenue			
Examinations/Consultations	15%				% of Total Revenue
Professional Services	3.8%		MEDICAL PRODUCTS		
Diagnostic Services	0.7%		Medicine Dispensed	14%	
Diagnostic Imaging	4.2%		Flea, Tick, Heartworm Products	8.9%	
Vaccinations	7.1%		Total	22.9%	
Laboratory	17.8%				
Surgery	5.4%				% of Total Revenue
Anesthesia	3.8%		NON-MEDICAL REVENUE		
Hospitalization	2.1%		Over-the-Counter Products	1.2%	
Treatments	3%		Diets (therapeutic & retail)	4.7%	
Dentistry	2.6%		Bathing & Grooming	1.5%	
Integrative Therapies	0.2%		Boarding	3%	
Other	1.7%		Other	0.3%	
Discounts	-1.5%		Total	10.7%	
Total	66.4%				

3. Consider Additional Services - Ancillary

Puppy Training Classes	> 20% of practices	House Calls	> 35% of practices
Adoption Programs	> 20% of practices	Behavior Counseling	> 45% of practices
Pet Transportation	> 20% of practices	Nutrition Counseling	> 50% of practices

4. Consider Additional Services – Medical

- a. Ultrasound
- b. Acupuncture
- c. Endoscopy
- d. Ophthalmology
- e. Laser Surgery

****Invest in new equipment -
Today's hospital budget is 2
to 3% of gross revenue***

Enter your practice data in the light blue cells.

Clinic Name Here

End of Month Report

Month: March

Year: 2012

	Mar 2012	Last Year: Mar 2011	Difference
INCOME			
Total Income			
Number of Business Days			
Transactions			
Average per Transaction			
Number of New Clients			
Total Accts Receivable			

	Last Month: Feb 2012	Difference

INCOME ACCOUNTS					
Professional Services			Boarding		
Dentistry			Grooming		
Surgery			Diet Products		
In-house Lab			Pharmacy		
Outside Lab			Flea Products		
Radiology			General Inventory		
Anesthesia			Other Income		
Clinical Trial			Discounts		

Forecasted Income		More than last year
Forecasted Reached?		

Accounts Payable	
Previous Balance:	
+ Current A/P*:	
- Payments Made:	
Accounts Payable Balance:	

EOM Checking Account Balance

* Current A/P is <= 30 days,
incurred since last report

STAFF SALARIES			
	Industry Avg	Dollars	% to Gross
Receptionist	6% - 8%		
Technicians/Assistants	9% - 10%		
Animal Handlers	4%		
Administrative	3% - 4%		
Staff Veterinarians	14%		
Total			

Clinic Name Here

End of Month Report

Month: March

Year: 2012

Cost of Goods Sold		\$0.00	% of Gross Rev		\$0.00	% of Gross Rev
Dentistry				Pharmacy		
Surgery				Flea Products		
In-house Lab				General Inventory		
Radiology				Grooming		
Anesthesia				Other		
Dietary Products				Outside Lab		

SALES BY PROVIDER

Last Year

Dr. One	Mar 2012	Mar 2011	Difference
Total Income			
Transactions			
Average per Transaction			

Last Month

Feb 2012	Difference

Dr. Two	Mar 2012	Mar 2011	Difference
Total Income			
Transactions			
Average per Transaction			

Feb 2012	Difference

Dr. Three	Mar 2012	Mar 2011	Difference
Total Income			
Transactions			
Average per Transaction			

Feb 2012	Difference

Dr. Four	Mar 2012	Mar 2011	Difference
Total Income			
Transactions			
Average per Transaction			

Feb 2012	Difference

III. Some Points to Consider

- A. Our ability to drive service revenue is a factor of time and efficiency
- B. A doctor's time is a finite and scarce commodity
 - I. "There are only twenty-four hours in a day."
- C. More Transactions
 - I. Less doctor time per transaction
- D. Less Transactions
 - I. More doctor time
- E. Quality of Personal vs. Professional Life

All practitioners must find a balance of time and efficiency that is perceived to be fair and equitable to the client.

IV. How Can We Increase Our Income and Improve Upon Our Quality of Life?

- A. Delegate and leverage your health care team.
 - I. Make your staff a resource, not a cost
- B. Ask Yourself: What tasks or activities currently performed by the doctor can be delegated to members of the veterinary health care team?
- C. Develop passive income areas of the practice by utilizing your veterinary health care team.
- D. Look to those services that don't require direct, full-time involvement of the doctor.
- E. What are the most common passive income areas?
 - I. Dental Cleanings
 - 2. Radiograph Procedures
 - 3. Lab Work
 - 4. Nail Trims
 - 5. Ear Cleanings
 - 6. Bandage Changes
 - 7. Anesthesia Induction
 - 8. Boarding
 - 9. Grooming

V. Characteristics of Successful Practices

- A. Will average 38% more visits per week
- B. Doctors will not work an excessive number of hours
- C. Will produce 51% more personal gross revenue

- D. Will receive more than 100% greater personal compensation
- E. Will utilize 1 additional non-DVM staff per DVM on practice than others
- F. Will average total expenses 2% greater than other practices
- G. Will have an average client transaction \$7-\$10 higher than others

VI. Invest in Continuing Education

- A. Budget .6-1% of gross revenue and include entire health care team in training

VII. Industry Trends

- A. Limited DVM availability
- B. How do we leverage our doctors' ability to enhance revenue?

VIII. Can We Achieve a "10" Quality of Personal and Professional Life?

- A. Dream or Reality?

Doctor Production Report

Dr. 1Name	March				April				May							
	2011	% Gross	2010	% Diff	2011	% Gross	2010	% Diff	2011	% Gross	2010	% Diff	2011	% Gross	2010	% Diff
Diagnostic Income	\$7,943.42	22.34%	\$7,387.55	-0.03	24.96%	\$7,533.00	24.21%	\$7,865.85	27.41%	-0.03	\$10,887.93	27.34%	\$6,373.61	22.21%	0.05	
Pharmacy Income	\$8,291.88	23.32%	\$5,318.68	0.05	17.97%	\$6,030.13	19.38%	\$5,839.84	20.35%	-0.01	\$8,490.51	21.32%	\$4,984.67	17.37%	0.04	
Professional Vluue Inc	\$17,696.69	49.77%	\$13,031.80	0.06	44.03%	\$14,558.82	46.79%	\$13,662.65	47.61%	-0.01	\$18,227.52	45.77%	\$13,192.02	45.97%	0.00	
Miscellaneous Income	\$1,624.95	4.57%	\$3,859.52	-0.08	13.04%	\$2,993.29	9.62%	\$1,328.67	4.63%	0.05	\$2,218.21	5.57%	\$4,146.72	14.45%	-0.09	
TOTAL INCOME	\$35,556.94	100.00%	\$29,597.55		100.00%	\$31,115.24	100.00%	\$28,697.01	100.00%		\$39,824.17	100.00%	\$28,697.02	100.00%		
Average Invoice	\$139.99		\$130.39			\$142.08		\$133.47			\$145.34		\$120.07			
Number of Invoices	254		227			219		215			274		239			

Dr. 2Name	March				April				May				
	2011	% Gross	2010	% Diff	2011	% Gross	2010	% Diff	2011	% Gross	2010	% Diff	% Gross
Diagnostic Income	\$9,652.18	27.41%	\$7,508.77	0.04	\$6,991.76	20.18%	\$6,927.83	-0.02	\$11,144.35	30.41%	\$7,280.31	23.34%	0.07
Pharmacy Income	\$7,166.06	20.35%	\$6,820.30	-0.01	\$6,049.37	17.46%	\$5,418.12	0.00	\$7,091.19	19.35%	\$6,612.79	21.20%	-0.02
Professional Vluue Inc	\$16,765.42	47.61%	\$13,663.13	0.05	\$18,196.60	52.52%	\$14,339.15	0.07	\$16,714.70	45.61%	\$13,247.41	42.47%	0.03
Miscellaneous Income	\$1,630.41	4.63%	\$4,179.04	-0.08	\$3,409.26	9.84%	\$4,507.30	-0.05	\$1,696.76	4.63%	\$4,051.89	12.99%	-0.08
TOTAL INCOME	\$35,214.07	100.00%	\$32,171.24		\$34,646.99	100.00%	\$31,192.40		\$36,647.00	100.00%	\$31,192.40	100.00%	
Average Invoice	\$147.34		\$134.61		\$146.19		\$135.62		\$145.42		\$136.81		
Number of Invoices	239		239		237		230		252		228		

Dr. 3Name	March				April				May						
	2011	% Gross	2010	% Diff	% Gross	2011	% Gross	2010	% Diff	% Gross	2011	% Gross	2010	% Diff	% Gross
Diagnostic Income	\$5,544.22	23.17%	\$5,277.37	-0.04	27.34%	\$4,503.18	20.48%	\$4,181.03	22.34%	-0.02	\$5,558.07	23.17%	\$4,671.37	24.96%	-0.02
Pharmacy Income	\$4,816.79	20.13%	\$4,115.34	-0.01	21.32%	\$4,355.86	19.81%	\$4,364.44	23.32%	-0.04	\$4,828.82	20.13%	\$3,363.16	17.97%	0.02
Professional Vluue Inc	\$12,538.50	52.40%	\$8,834.86	0.07	45.77%	\$11,090.85	50.44%	\$9,314.67	49.77%	0.01	\$12,569.82	52.40%	\$8,240.41	44.03%	0.08
Miscellaneous Income	\$1,028.92	4.30%	\$1,075.16	-0.01	5.57%	\$2,038.31	9.27%	\$855.30	4.57%	0.05	\$1,031.49	4.30%	\$2,440.49	13.04%	-0.09
TOTAL INCOME	\$23,928.43	100.00%	\$19,302.73		100.00%	\$21,988.20	100.00%	\$18,715.44	100.00%		\$23,988.20	100.00%	\$18,715.43	100.00%	
Average Invoice	\$104.49		\$88.14			\$100.40		\$84.69			\$103.85		\$84.69		
Number of Invoices	229		219			219		221			231		221		

Date _____

Practice Name | 123 West Avenue | Evergreen, CO 80439 | 303-555-5555

Dermatology**Abscess Treatment**

An abscess is a pocket of infection that contains pus. They often result from a bite where the skin is broken and hair and bacteria are trapped under the skin. The wound then seals and the abscess develops. This is usually quite painful and your pet could be less active and have a fever during this time. Surgical treatment is sometimes necessary to drain the abscess. At times, a drain tube may be needed to help prevent fluid from accumulating and to help clear out the infection. With severe infection, your pet will possibly need to be hospitalized following surgery.

Since pets often chew or lick at drains, a protective Elizabethan collar may be needed.

MEDICAL CARE PLAN FOR DRAINING ABSCESS

	Low	High
Physical Examination / Consultation	\$0.00	\$0.00
Laboratory, Pre-Anesthetic Blood Analysis	\$0.00	\$0.00
Anesthetic Monitoring, advanced	\$0.00	\$0.00
Anesthesia (1-15 minutes)	\$0.00	\$0.00
Anesthesia (16-30 minutes)	\$0.00	\$0.00
Anesthesia (30-45 minutes)	\$0.00	\$0.00
Anesthesia (46-60 minutes)	\$0.00	\$0.00
Anesthesia (additional 30 minutes)	\$0.00	\$0.00
Drain, Clean, Flush Abscess	\$0.00	\$0.00
OR Usage and Materials	\$0.00	\$0.00
Surgery, Drain Tube (each placement)	\$0.00	\$0.00
Injections - In Hospital	\$0.00	\$0.00
Pain Free Protocol	\$0.00	\$0.00
Oral Medications - In Hospital	\$0.00	\$0.00
Hospitalization	\$0.00	\$0.00
Daily Doctor Professional Care (per day)	\$0.00	\$0.00
Elizabethan Collar	\$0.00	\$0.00
Oral Medications - Dispensed	\$0.00	\$0.00

TOTAL	\$ -	\$ -
-------	------	------

DEPOSIT REQUIRED	\$ -	\$ -
------------------	------	------

For severe or difficult to treat cases:

Hospitalization	\$0.00	\$0.00
Daily Doctor Professional Care (per day)	\$0.00	\$0.00
Injections - In Hospital	\$0.00	\$0.00
TOTAL ADDITIONAL SERVICES	\$ -	\$ -

Additional Treatments:

Examination, Medical Progress recommended 3 to 7 days after treatment/surgery	\$0.00	\$0.00
Suture and drain tube removal up to 7 - 10 days	No Charge	

TOTAL INCLUDING ADDITIONAL PROCEDURES	\$ -	\$ -
---------------------------------------	------	------

Consent Release _____

Patient _____

Client Name (printed) _____

Doctor _____

Client Signature _____

Date _____

Mississippi Valley Veterinary Medical Association



SECTION III

Controlling Your Inventory & Support Staff Costs

Controlling Your Inventory & Support Staff Costs

I. Inventory Costs

- A. Your inventory costs to gross should be 14-16%
- B. Let's look at some of the reasons why your inventory costs might be out of line
 - 1. Shelf life
 - 2. Duplicity of product
 - 3. Factor of mark-up
 - 4. Factor of total income
 - 5. Embezzlement

II. Do You Have an Effective Inventory Control System in Place

- A. Can you control all your inventory with your computer software program?
- B. Items that go through the receipting process can be controlled by your computer system, items that don't go through your receipting process must be controlled by an alternate system
- C. Let's discuss both inventory control systems
 - 1. Manual - Red Flag Inventory Control System (see page 95)
 - 2. Computerized inventory control with your veterinary software program
 - a. Establishing effective inventory control with your computer
 - 1. Review your type categories
 - 2. Set up a "manual" type category
 - 3. Review all inventory items in the computer for the following:
 - a. Buy-to-sell ratio
 - b. Mark-up
 - c. Auto calculation
 - d. Description
 - e. Review other information
 - 4. Perform a physical inventory
 - 5. Enter new numbers into the computer
 - 6. Print re-order reports
 - 7. Use your inventory control system
 - 8. Do a physical inventory at least once a year

III. Controlling Your Support Staff Costs


- A. Your total support staff costs to gross should be 22-23%
 - I. What is included in this number?
- B. Breakdown of support staff costs to gross
- C. Associate doctors should run around 14% of gross income, but be paid on a percentage of their individual production.
 - I. ProSal
- D. What are the causative reasons why support staff costs to gross might be too high in a veterinary practice?
 - I. Scheduling
 - 2. Overtime
 - 3. Poor utilization and training
 - 4. Factor of income
 - 5. Embezzlement
- E. What can you do to bring your inventory and support staff costs into line in your practice?

INVENTORY REORDER TAGS


Available in Quantities of 500

Price: \$45.00 per package (*Includes shipping and handling*)

Front

 REORDER THIS ITEM NOW!
ITEM NO
DESCRIPTION
COMPANY
REORDER QUANTITY
RETAIL
NOTES:

Back

		
DATE	AMOUNT	PRICE

(Shown Actual Size)

Quantity Ordered: _____ @ \$45.00 each = _____ Total

Send to:

Name: _____

Practice Name: _____

Address: _____

City/State/Zip: _____

Telephone: _____ Fax: _____

Please make checks payable to VMC, Inc.

Payment by Credit Card: MasterCard ☐ Visa ☐

Account Number: _____ Expiration: _____

Authorized Signature: _____

Fax to 303-670-3899

Mail to: VMC, Inc., 30792 Southview Drive, Suite 200, Evergreen, CO 80439

Mississippi Valley Veterinary Medical Association



SECTION IV

**Income Harvest:
*Pick Low Hanging Fruit***

INCOME HARVEST: PICK LOW HANGING FRUIT

***Before you schedule the cherry picker to come to your practice, let's see if we can fill your basket with some of the "low hanging" fruit.*

I. Minding the Client Base

- A.** Identify all the clients that have not had services rendered during the past 12 months
 - 1.** Send a purging card or letter
 - 2.** Contact the client directly
- B.** Evaluate your reminder system for its effectiveness
 - 1.** Determine patients seen yet missing future reminders
 - 2.** Effectiveness of current system
 - 3.** Methods for improving effectiveness
- C.** Target marketing
 - 1.** Geriatric target marketing
 - 2.** Dental target marketing
 - 3.** Other
- D.** Acknowledge your referrals
 - 1.** Graduated thank you for referral system
 - 2.** New client thank you cards or letters
 - 3.** Acknowledge referrals from other hospitals

II. Create Profit Centers Within Your Practice

- A.** Retail sales
 - 1.** Point of Purchase Display

- B.** Boarding Service
 - 1. Limited boarding
 - 2. Value added services
- C.** Grooming
- D.** Developing Your Medical and Surgical Services
 - 1. Marketing of dental services
 - 2. Wellness programs
 - 3. Laser surgery
 - 4. How are clients to know about these services if we do not inform them?
 - a. Photo mural
 - b. Hospital brochure or folder
 - c. Web site
 - d. Target marketing
 - e. Sign in front of practice

III. Effectively Charging for Your Services

- A.** How to determine what to charge for “Shopped and exposed” services
- B.** How to determine your in-hospital fees
- C.** Evaluate for appropriate charging of pharmacy items

IV. Reduce Your Expenses

- A.** Inventory
- B.** Support staff
- C.** Expense analysis

V. *Fee Capture – Is Your “Bucket” Leaking?*

A. Embezzlement – One out of ten practices are embezzled from each year!

1. End-of-day procedure
2. Itemized audit trail
3. Bank statements
4. Credit card reconciliation
5. Password protection
6. Inventory control
7. Being aware and attentive

B. Internal controls

1. Out-patient procedures
 - a. Patient visit form
2. In-hospital procedures
 - a. Tracking form
3. Manager must oversee these internal control processes

VI. *Increase Client Transactions*

A. There are basically only two ways to increase per client transactions

1. We can sell another _____ or _____

B. Make sure you offer a full service approach

1. Pre-exam checklist
2. CDC Recommendation on strategic de-worming
3. Passive marketing in the exam room
4. Every office visit presents an opportunity to educate a client about another product or service

C. We need to charge for our knowledge and develop the professional service aspect of our practice.

1. Can you afford to lose 20-25% of your annual income?

2. Break out your comprehensive physical exam charge from the vaccine charge
3. How effectively are you charging for the following services:
 - a. Hospitalization
 - b. Daily doctor professional care
 - c. Operating room usage and materials
 - d. Surgeon's time
 - e. Anesthesia
 - f. Puppy and kitten series
 - g. Radiology
 - h. Other

VII. Continued Success

- A. It's not how many clients you bring in the door, it's how many come back to you
- B. Remember price is only an issue in the absence of value. Accentuate value, not price, to your clients
- C. Success is contagious

ABC VETERINARY HOSPITAL
1234 SOUTHVIEW DRIVE, SUITE 567
ANYWHERE, USA 12345
(678) 910-1112

January 15, 2012

Dear April Jones,

It's been over a year since we've seen you at *ABC Veterinary Hospital*. We know that your pet probably doesn't enjoy a doctor visit any better than the next pet, but they are necessary for continued good health. Animals age much faster than people, so an annual checkup for your pet is like a person only going to the doctor once every 5 to 7 years.

Please let us know why you haven't been in:

- ☐ I simply forgot—time flies! I'll call to make an appointment right away.
- ☐ The pet no longer lives with me. The new owners are _____ and their address is _____.
- ☐ Cash is tight around here, but please keep my file active. I will call as soon as possible to make an appointment.
- ☐ I was unhappy with something last time I was there. *Please describe (we'd like to know).* _____

- ☐ I have selected another veterinary hospital—please send a copy of my records to _____ so that my pet's medical history remains complete.
- ☐ My pet has passed away. (*If this is the case, we're terribly saddened to learn about it. We'll inactivate his/her file.*)

If you would prefer to talk with us instead of replying by return mail, please call the hospital at 678-910-1112.

Sincerely,
Your Health Care Team

Sherbert's Big Day at the Dentist



My family complains of...

- ☐ Bad Breath
- ☐ Brown Teeth
- ☐ Loose Teeth

I complain of...

- ☐ Bleeding, sore gums when I chewed
- ☐ Pain from broken teeth or cavities
- ☐ Infection, making me feel bad

I have been diagnosed with...

- ☐ Gingivitis
- ☐ Periodontal Disease

**Today, Dr. Name and Name, my technician,
cleaned my teeth and treated my gums.**

Before



After



I can't wait to kiss my Mom!