

Managing clients in solo practice

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Abstract

Ark Veterinary Services, LLC is an ambulatory mixed animal practice in rural South Carolina. The practice, entering its eighth year, is owned solely by Dr. Sarah Blackwell. This manuscript offers guidance based on successes and pitfalls experienced while managing clients as a solo practitioner. Client expectations, client communication techniques, programs/companies/services, and support staff are areas when managed properly, prepare solo practitioners for a successful career.

Key words: perception, consequences, enforcement, streamline, accountability, client expectations

Introduction

When providing a service, a client's expectations and perception greatly influence their experience with that business. A client's perception is a valid experience or understanding from their point of view. Most clients lack a veterinary medicine background; therefore, much of their perception is based on emotions and finances. Was the doctor kind, was the perceived patient pain minimized, or did the price match the level or skill of services? These questions, most often not vocalized, help clients mold their expectations for interactions with a practice. It is important to acknowledge that the first interactions most clients have with a practice are not always in person. Client expectations and perceptions start forming over the phone, through email, mailers, or social media. As a solo practitioner, it is vital to set the expectations for clients at all levels. Encouraging clients to vocalize their concerns, medically guiding a client through an emotionally difficult decision, or explaining the charges on an expensive itemized estimate are examples of a doctor empathizing with a client's emotional/financial concerns while redirecting to a more medical/patient-focused experience.

The solo practitioner is one person, and many clients expect them to "do it all". To clients this means being available 24/7, always responding quickly, never missing a day, and prioritizing their animals. Unmanaged client expectations can make a solo practitioner forget the reasons they started their practice. These reasons include helping clients reach and improve their goals through improved production/performance of their animals, the ability to choose a desired animal type/career focus, more control over the quality of medicine practiced, work-life balance control, and financial stability.

Controlling client expectations comes with gentle reminders that a solo practitioner is a veterinarian as a career, but also a singular person that has the same human needs as they do. To build the clientele that appreciates the solo practitioner's expectations, establish boundaries prior to the first appointment and clearly communicated animal husbandry needs are vital. Hours of operation, prices or estimates, services offered, and patient after care should be discussed with clients prior to their appointment. Miscommunication in these areas tends to make up most client complaints. Respectfully establishing clear boundaries of the practice/solo practitioner decreases client confusion and helps set up a practice for longevity.

Enforcing boundaries

Enforcing boundaries of the solo practitioner is the most important and often hardest part of managing client expectations. Consequences must be made just as clear as the expectations of the client. Typically, consequences fall into two categories: fees or loss of services. Some examples include late fees for past due invoices, cancellation/missed appointment policies, required deposits, or termination of services in severe cases. Policy violations communicated respectfully should reinforce boundaries without creating a tense environment. Good clients will understand their mistake and move forward with little to no debate. If clients become hostile, aggressive, or refuse to take accountability, removing them from the clientele base tends to be the best option for a successful practice.

Communication

Client communication techniques for the solo practitioner can be broken down into two categories: in-person or remote. Effective in-person communication starts with the solo practitioner or support staff establishing an appointment flow, discussing changes as they arise throughout the appointment, receiving client approval prior to proceeding with different diagnostics or treatment plans, and ends with summarizing the appointment. It is very difficult to have a miscommunication if these steps are followed. Remote client communication is just as important for the solo practitioner including email, texting, phone calls, social media, mailers/flyers, medical notes, charts, and sending pertinent information in a timely manner. Updating clients on changes (especially arrival times, if mobile), reminders for upcoming appointments/rechecks, reporting lab results within quoted times, patient follow-up, and sending estimates prior to appointments are some of the most important tasks to keep your clients informed remotely.

Programs, companies, and services help prevent client needs and communication from becoming an overwhelming or time-consuming task for a solo practitioner. It is important to invest in programs, companies, or services that will help streamline and alleviate these stressors. Some programs, companies, or services that solo practitioners can utilize to improve the management of their clients are call or answering services, accessible practice management software, online scheduling, websites, chat bots, common questions and answers pages, lists of referral options, online pharmacies/stores, collection agencies, and cremation and grief services. This is not an all-encompassing list; however, these programs and companies allow clients to receive complete services.

Staffing

Support staff is an integral part of a successful solo practice. These support staff do not have to be full-time, year-round, or in person. When the need to add support staffing is reached, there should be a clear job description, expectations, standard operating procedures (SOPs), training modules, and routine

performance reviews. Support staff typically spend more time interacting with clients than doctors. The staff should be prepared and trained to assist clients in a manner that represents the solo practitioner positively and supports clinic SOPs. Some common support staff positions include office/practice manager, technicians/assistants, receptionists, and kennel/barn staff.

In conclusion, the Golden Rule still applies. Treat others the way you'd like to be treated. Managing client interactions and their animal's care should align with how you'd expect to be treated at a veterinary clinic. Prioritizing and managing client expectations, client communication techniques, programs/companies/services, and support staff are the best way to ensure a solo practice is successful.



