

Ensure Firing a Client Is the Option of Last Resort

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Firing a client means terminating the veterinary practice–client–patient relationship.¹ That sounds like a simple process, but it is seldom a practice’s best option and understanding the situation thoroughly before choosing termination is essential.

Following are some of the reasons a veterinary team may consider firing a client. He or she:

- Does not value the services provided (eg, complains constantly about costs)
- Does not respect team members (eg, speaks to them rudely, insists on working with a veterinarian only)
- Threatens or bullies any team member
- Fails to pay bills despite a signed agreement
- Abandons a pet

Before terminating the relationship with a client, be sure you know what he or she wants.

What Clients Want

Today’s veterinary consumers are different but also the same.

They differ in that they may not value long-term loyalty, and they may look to the internet as their first “veterinary visit.” Clients who once relied almost exclusively on the expertise of the veterinary team now tend to gather their own information from various sources.² Practices need to embrace this new mentality.

They are also the same in that they want stellar client service, the best medicine for their pet, and honest, transparent communication.² However, the perception of value, finances, lack of team member communication, and poor customer service often cloud the conversation.

■ **Stellar Service**

Exceptional service must be delivered by every veterinary team member. Clients are easily overwhelmed with information in the examination room because team members forget that the routine knowledge they share is seldom routine for the client. For example, a team member likely explains heartworm prevention options to clients every day, but the client may be hearing the information for the first time.

The veterinarian should always explain to the client the overview of the medical recommendation for the pet. Then, a veterinary nurse

should repeat the recommendation with a printed document that includes pricing and provides additional information for the client to read at home. The documentation should always include practice contact information. Every client knows good customer service. When service is consistently phenomenal, the need to terminate clients will drop.²

■ **The Best Medicine for Pets**

Clients did not go to veterinary school, so they are likely unfamiliar with best medical practices. What they want is an explanation in terms they understand of what is wrong with their pet and the pet's best treatment options. Do not sugarcoat conversations about the patient's prognosis out of fear of hurting the client's feelings. Be honest and clear. Do not give estimates and treatment plans verbally; instead, provide printed documentation that includes costs and explains why the suggested treatment is the best medicine for the pet.

■ **Honest, Transparent Communication**

Team members must communicate with clients clearly and honestly in a way that conveys empathy and compassion. When clients do not feel they are being heard, or feel they are being cheated or lied to, they will become disgruntled.

What the Veterinary Team Does Not Want

Terminating clients has many ramifications, including a damaged reputation, a potential complaint to the state veterinary medical board, or a lawsuit, and should be prevented if possible. Every practice should complete a self-assessment to understand the client–practice experience. Consider the following questions:

- **Did the client understand the information presented?** Every team member must go

BENCHMARKS

Check How Services are Delivered

Take a few moments to audit your practice's current level of service delivery. Use the worksheet, *Experience is the Key to Differentiation*, in the WMPB study.*

- Walk through the next preventive care appointment and experience the appointment alongside the client and patient.
- Note anything the team is doing well and any opportunity for improvement.
- After the appointment, give the team members involved feedback and coaching.
- Take service delivery to the next level by beefing up protocols and training manuals to reflect what the practice should provide as consistently as possible for every appointment.

*SOURCE: *Benchmarks 2017: A Study of Well-Managed Practices*. Columbus, OH: WMPB; 2017:40-43.

above and beyond to ensure client understanding. The Adult Learning Theory,³ (ie, hearing, seeing, touching, doing) can help clients understand the message.

- **Hear:** Repeat the message 3 times with different words.
- **See and Touch:** Use models to describe the key points.
- **Do:** Send the client home with literature they can review.

- **Did team members show empathy and compassion?** Team members may (eg, when short-staffed, overwhelmed, stressed) “walk through the process” and simply “check off the boxes” when communicating with clients. When sincerity, empathy, and compassion are lost in the message, the client perception becomes, *They do not care about my pet*. Team members do care about their patients, but their nonverbal communication may deliver a different message.
- **What was the client’s experience in the practice?** Every team member should walk in the client’s shoes, even if for just 10 minutes, to feel and understand the client experience.

Also, take the following steps.

- Evaluate all client communications (ie, verbal, paraverbal [ie, pitch, tone], nonverbal [ie, sighs, pacing]) that are delivered by team members.
- If allowed in your state, review video footage from security cameras or place mobile video cameras around the practice to capture the actual communication. Educational courses are available to build these skills.
- Evaluate every client’s true experience. Ensure client surveys are delivered to clients and feedback is evaluated and followed up.
- Develop a customer-centric team that is all about service.

- Understand the client’s perspective; there are 2 sides to every story and if one client is having a poor experience, others are likely having the same experience.

Develop a practice protocol that includes professional development for the entire veterinary team to help prevent the need to terminate a client. Investigate the last 3 terminations. What was each client’s chief complaint? Use all the information gathered to guide the protocol.

Client Termination Do’s & Don’ts

WHEN TERMINATING A CLIENT IS NECESSARY:

DO

- Ensure the patient is not currently receiving immediate medical care in the practice.
- Ensure the medical record is complete, then copy the record.
- Include a short letter indicating the practice can no longer serve the client’s needs and attach the patient’s medical records for the new veterinarian.
- Send the package to the client by certified mail.
- Document all the steps taken in the medical record.

DO NOT

- Argue with the client.
- Discuss the case with any client except the person listed on the medical record.

When Client Firing Cannot be Avoided

Termination is appropriate in some cases, such as clients who are always intoxicated or clients who threaten a team member. (See **Client Termination Do's & Don'ts**.)

Relationships can be terminated when the patient is not under the veterinarian's direct care; however, if the patient is receiving medical care, the practice must continue providing care until the client has transitioned to another veterinary practice.¹

TAKE ACTION

- 1 Thoroughly investigate why a client is being difficult before deciding to terminate the relationship, because often the problem is poor veterinary team–client communication.
- 2 Survey all clients to see the practice through their eyes and use that feedback to develop practice policies that will help prevent client firings.
- 3 When client termination cannot be avoided, know the necessary steps and always protect practice team members.

Team safety is always a priority and a police report should be filed if appropriate (eg, when threats are made, verbal assaults occur, the client stalks any team member).

Conclusion

Firing clients is occasionally inevitable, especially when team member safety and mental health is at stake. However, always investigate the reasons for a client's behavior to ensure it was not the result of miscommunication or poor service. Service can be quickly corrected, but reputation in a community cannot. ■

References

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FUN FACT: Heather drives a customized Harley Davidson Fat Boy when time allows.

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