

What's The Best Way To Train A New Receptionist?

By Wendy S. Myers



Q. As the head receptionist, I just hired a new team member. How can I make sure this employee starts off on the right foot?

A. Following a structured training program and creating a welcoming environment will ensure that your new receptionist becomes a valuable team member. Too often, receptionists get turned loose on phones and clients without instructions on how your practice operates. “Most people don’t spend enough time stressing professionalism and client education,” says Susan Savage, CVT, a practice manager at Clermont Animal Hospital in Clermont, Florida, and an office-procedures instructor at Brevard Community College in Cocoa, Florida. “They try to throw too much at a receptionist the first week.”

By following a training plan, your new receptionist can gain confidence and skills to represent your practice well. Follow this advice from team members:

1. Plan a great first day. Remember your first day on the job? You were nervous about meeting co-workers, afraid of making mistakes and hoped you’d chosen the right job. As the head receptionist, you can ease first-day jitters with some simple gestures. Ask the new receptionist to start an hour later than other staff members on the first day. A shorter first day is less stressful and other employees will be ready to greet the new team member. Place a small bouquet on the counter with a “We’re glad you’re here!” card signed by staff members. If you have a marquee sign, post a welcome message that announces a new employee.

Give the receptionist a tour of the practice and stop to introduce each staff member and describe his or her role. Share personal comments about each employee, such as “Jackie is a certified veterinary technician who has been with our practice for seven years. She loves exotic pets—be sure to ask her about how she named her iguana.” Point out the time clock, bathroom, staff lounge, locker, employee bulletin board and other conveniences. After the tour, let the new receptionist observe employees or read client handouts and the hospital

manual. Soon, lunchtime will arrive and you can ask three or four team members to join you. Pick up the tab for the new employee's lunch. This social occasion lets team members get to know each other and begin to develop trusting relationships.

2. Ease into training. Savage doesn't let a new receptionist touch the phone until 30 days pass. The first week, the new receptionist learns to greet and check in clients, input information in the computer, and how to record details in medical records. During the second week, Savage reviews lessons from the first week and adds checking out clients and explaining invoices. The third week focuses on computer use, including scheduling appointments and end-of-the-day reports. The fourth week wraps up training with phone systems and tips on appointment scheduling. "We've developed standard operating procedures for certain types of appointments," Savage says. "I also call the practice and pretend I'm a client who needs an appointment. I audiotape the conversation and then review it with the receptionist so I can coach her."

Amy Buggenhagen was a client at West Hills Animal Hospital in Corvallis, Oregon, before she joined the team as a client service representative. She spent several weeks watching, listening, reviewing product information, reading handouts, studying protocols and learning the procedures manual before assisting clients. "Once you jump in, you have confidence," Buggenhagen says. "I learned to read clients and take different approaches with different people."

3. Clearly define roles. Larger practices often designate a front-office team member as a practice operator, greeter, floater or checkout receptionist. Smaller practices cross-train receptionists to handle these tasks as well as assist in the exam room when needed. No matter which system you use, job descriptions and clear expectations can help a new employee understand his or her role.

Polo Springs Veterinary Hospital in Colorado Springs, Colorado, uses a team leader, floater and greeter during each shift. The shift leader also facilitates communication between morning and evening shifts, ensuring that everyone knows the status of hospitalized patients and the day's priorities. "Exam-room technicians also work hand-in-hand with receptionists to link communication between team members in the back and front of the hospital," says Jim Lehman, hospital administrator.

4. Assign a mentor to instill confidence. A buddy system can grow skills in your new receptionist while developing leadership qualities in seasoned staff members. Follow a training checklist that must be initialed by the new employee and mentor or supervisor. This makes the mentor accountable for the new receptionist's success and gives both a list of learning goals to achieve together. For a receptionist training checklist, visit Veterinary Practice Consultants' web site at www.v-p-c.com.

In addition to a fellow receptionist as a mentor, you might add a technician or veterinary assistant as a mentor after the first few weeks. This secondary mentor can teach your new receptionist about "what happens in the back" and prevent front-versus-back attitudes. "We cross-train so everyone has more empathy for the other team member," Savage says. "I go to technicians and receptionists meetings so I can share information between the two groups."

5. Provide learning resources. Besides hands-on training and coaching from mentors, consider these educational resources from AAHA. To order these AAHA books and videos, call (800) 883-6301 or visit www.aahanet.org:

- "First Impressions That Last: Retaining Clients With Great Customer Service" video and workbook by Dr. Cecelia Soares, (AAHA Press, 2000)
- *Educating Your Clients From A to Z* by Dr. Nan Boss, (AAHA Press, 1999)
- "One Client at a Time: Building Customer Loyalty and Practice Success Through Personal Marketing" video and workbook by Dr. Cecelia Soares, (AAHA Press, 1999)
- *Connecting With Clients: Practical Communication Techniques for 15 Common Situations* by Laurel Lagoni, MS, and Dana Durrance, MS, (AAHA Press, 1998)
- *The Veterinary Receptionist's Training Manual* by Dr. James F. Wilson, JD, (Priority Press Ltd., 1995)

For additional training resources, consider:

- *The Veterinary Receptionist's Handbook*, 2nd Edition, by Dr. M.T. McClistter and Amy Midgley (Veterinary Healthcare Communications, 2000), (800) 255-6864 or www.vetmedpub.com

- *Creating the Veterinary Experience: Developing Effective Staff Communication* by Dr. Ernest Ward Jr., (E³ Management, 2000), (910) 579-5550 or www.e3management.com
- Animal Care Training Programs offers six videos on receptionist training, (800) 357-3182 or www.4act.com

6. Be a communication coach. Developing phone and client-service skills doesn't happen overnight. Give a new employee constant feedback about exceptional performance as well as ways to improve. "You need to spend one-one-one time away from the front desk and find out where they need extra guidance," Savage advises. "You can't train at the front desk all of the time."

7. Reward good performance. Before hiring a receptionist, Savage invites a candidate to observe for several hours on a busy day. After a 90-day probation period, the receptionist earns a 50-cent per hour raise. "You get a good chance to see how she will fit in with the team," Savage says.

At Polo Springs Veterinary Hospital, receptionists also complete a 90-day probation period and receive a review and raise when completing training. Team members also appreciate a 401(k) plan, health insurance and other benefits. Supervisors coach receptionists so they can start a career ladder towards promotions. "We always look for people who can work with people," Lehman says. "Some practices look for cheap labor. These people are representing your hospital and clients draw their perceptions from receptionists. If you hire people who are dedicated and pay and treat them well, they'll stay on."

About the Author:

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