Onboarding your team for the best customer experience

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cdmv

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Chapter 1

Enhancing the customer experience

Pet owners' expectations

Remember that pet owners want the following from an online solution:

1. A seamless and user-friendly experience.
2. A wide variety of products.
3. A secure environment.
4. An accessible and trusted veterinary team.

Greater convenience, healthier pets

Offer an expanded product line that is available to pet owners 24/7.

By providing greater convenience, you encourage pet owner compliance, which can ultimately impact the health and well-being of their pet.

Good news for your veterinary practice team

An online solution will take care of many of the back-end details, so your team will have more time to do what they love most:

Taking care of pets!

The online boutique: A new frontier

Onboard the entire team to ensure everyone is on the same page.

A unified and passionate team will provide the best experience for your clients.

Share the excitement!

The practice manager should hold an information session to announce the online boutique:

- Explain the benefits.
    - more time dedicated to pet care
    - increased compliance
    - a new way to reinforce your professional recommendations
    - a new opportunity to build relationships with customers, etc.
- Listen to employee comments and concerns.
- Keep your employees in the loop.

Assigning roles

- Assign and train team members for specific roles related to the online boutique.

- Make sure everyone clearly understands their role so they can take responsibility and make sure the job is done properly. Set up a rotating schedule if required.

- Assign roles based on interest, skill, and availability.

- Free up time to accommodate tasks related to the online boutique.

Chapter 2

Role: Email collection

Why is it so important to collect email addresses?

Using emails to foster client relationships

Use emails to send out annual reminders, appointment confirmations, follow-ups, etc.

By using e-mail to communicate important information, you'll familiarize your customer with receiving information from you and improve your relationship with them.

Using emails as a development tool of your online boutique

The number and proportion of email addresses you have in your management system is crucial to the success of your online boutique.

The more complete and up-to-date your e-mail list, the more likely you'll be able to send invitations to your customers when your online store is launched.

Importance of email addresses

- **1 email address** = 1 potential new online account, and so one potential new buyer of quality pet food from the veterinarian.

- **1 email address** = 1 opportunity to improve compliance with the recommendations made to your client, notably thanks to recurring orders.

- **1 email address** = 1 sustained and engaging dialogue with your client.

And now...
Your role!

For a successful launch of your online store, you'll need to validate the information (email address and contact authorization) in your customer database and update it as necessary.

- You'll always have up-to-date contact information, which will help your team to serve the customer and follow up in the most efficient way.

- You can also send promotional emails and reminders.

Role: Email address collection

Confirm and/or update the contact information in your client database if needed.

Implement simple protocols to update this information **at each and every visit.**

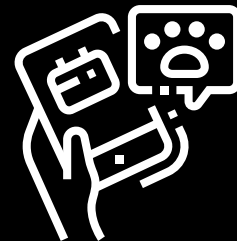# How to collect client emails

Pet owner information can be gathered in the following ways:

During client check-in, by greeting staff

Client fills out form while in the waiting room

Client fills out online form on your website to book an appointment

At client check-in

- Greet the pet owner as usual.

- Update the pet owner's personal information immediately after accessing their data:

- "I would like to confirm that your contact information is up to date in our system"
  - Home address.
  - Phone number(s) (home, cell, work).
  - Authorized names in the file.
  - Active animal(s) listed in the file.
  - Email address.

- If the client's personal information was not updated at check-in, do it before they leave.

Email address: Consent

Make sure you obtain the client's consent to receive emails, promotional material, notifications and reminders via your POS (point-of-sale software).

What if the client refuses to share his/her email address?

Reassure the pet owner of the following:

- A complete record is crucial to providing the best care and follow up.

- They will be contacted when relevant.

- Email is an efficient way to communicate important messages regarding their pet's health.

Example :

"We ask all our clients to provide us with their email address to be able to provide professional follow-up. This does not commit you to anything."

If the pet owner continues to refuse, do not pressure them.

Role: Email address collection

- This role is everyone's responsibility.

- Each client file must include a valid email address.

- Keep your client database up to date.

- This is an ongoing process: you may have to send a few reminders.

It takes a bit of time, but it pays off!

Chapter 3

Role: Validation, Verification & Authorization

Validation, verification and authorization

At least two people should be assigned the responsibility of verifying pending tasks (product authorization for example).

These individuals should be meticulous and have good organizational skills.

Responsabilities

- Check the requests **many times during the day.**

- Contact client immediately if an issue is detected.

- Manager should verify weekly to ensure requests have been validated.

Do not forget that the order will be released only once the pending request is completed.

Validation, verification and authorization = better customer service

- An opportunity to show a level of care lacking in other online stores.

- Clients will appreciate the follow-up.

- Reinforcement of your role as experts.

- A worthwhile time investment.

Chapter 4

Role: Customer support

The human touch with online clients

Pet owners still cherish the human relationship with a veterinary team they trust.

Differentiate yourself from other online stores by offering the "human touch."

Take the same care with your online clients as with pet parents who visit your physical practice, as they also need:

- To get answers to their questions.
- To know they can voice their opinions.

Don't be your own customer service nightmare

The whole team should be able:

- To answer questions regarding the online boutique.

   TIP:
   - Have your customer support team manually go through different aspects of placing an order, making a return, etc. Hands-on experience will be invaluable when guiding their clients through the process.

- To quickly direct clients to someone on the team who can answer them immediately.

Role: Customer support

Appoint one or two representatives to handle client questions via email and phone.

Should have the following qualities:

- Cheerful.

- Patient.

- Strong written and verbal communication skills.

Role: Customer support (cont'd)

They should be able to answer questions related to the following:

- Basic functioning of the online boutique.

- Signing up for the online boutique.

- Finding a specific product on the website.

- Tracking shipments.

- Billing.

- Return policy.

- Reimbursement.

Create guidelines for responding to clients

Create easy-to-follow guidelines on how to respond to questions and reviews.

Respond within 24 hrs.

If responses require more time, ask if you can call back later:

- Get their callback number and a convenient time.
- If it will take longer than expected, provide an updated timeframe.

"I'll call you back within the next X hours."

Create guidelines for responding to clients (cont'd)

Let the client set the pace:

- Make sure they feel heard.

- Don't take your client's level of digital literacy for granted.

- Avoid jargon and overly technical language.

- Provide links to videos, documents, etc., if more information is needed.

- Use open-ended questions to encourage more questions.

Create guidelines for responding to clients (cont'd)

- Be encouraging positive language (vs. negative language) is linked to better adherence.

- Consider their non-verbal cues.
  Body language from the pet owner, hesitation or long pauses, etc. may provide clues that further clarification is needed, that they are anxious, upset, etc.

- Consider your own non-verbal cues… They can be "heard" even when you're talking on the phone. Smile!

  Be aware of your own non-verbal cues: maintaining eye contact, smiling, and nodding helps to show your genuine interest/concern; avoid cues that show a lack of interest/impatience (e.g., sighing, eye rolling, lack of eye contact, checking your watch, etc.).

Room for growth

- Manager meets with customer support on a regular basis to understand commonly asked questions, complaints, and even positive feedback.

- Create protocols to proactively address recurring issues; share the guidelines with the entire team.

Chapter 5

Role: Marketing and promotion

Role: marketing and promotion

Prior to launch, assign at least one person to coordinate the marketing of your online boutique.

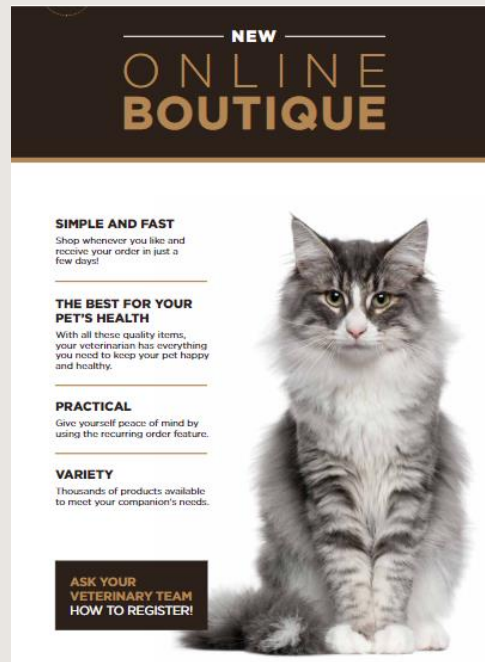**Use promotional tools**

- Promotional material.

- Social media.

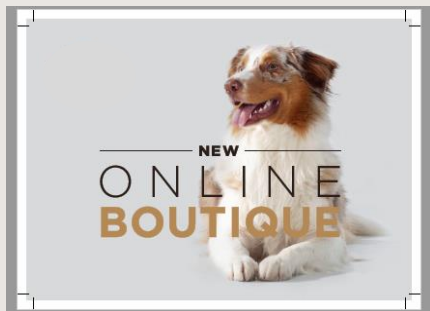# Before launch: Install the promotional material

Examples:

Posters, tent cards, stickers, displays, etc.

- Helps start a conversation with clients.
- Serves as a daily reminder for the team.

Start to talk about it... Before launch

Start to share the news on social media BEFORE launch.

Sample Facebook post:

Coming soon! Exclusive access to our online boutique for our customers. Stay tuned!

On launch day: Spread the news!

Invite your customers to "take action" by talking about your online boutique on your different platforms (email signature, newsletter, website, Facebook page, on-hold message, voicemail message, reminder on your invoices, etc.).

Example :

New! You can now buy all your pet supplies ONLINE. Quality. Speed. Simplicity.

Happy shopping!
[Insert your website URL here]

After launch: Keep spreading the news!

In the months following launch, make your online boutique the focus of your website and social media:

- Post links and calls to action on the homepage.

Your online boutique should be part of the routine during an in-clinic visit:

If you don't tell them, your clients won't know that they also have the option of purchasing their products online. Talk about it!

To infinity and beyond!

Send out regular messages about the online boutique:

- Depending on frequency, this can be once or twice a month.

Don't go overboard. Clients don't like to be swamped with emails:

- Take advantage of key periods: the Holidays, Black Friday or Cyber Monday, Valentine's Day, etc.

To infinity and beyond! (cont'd)

Examples of Facebook posts:

Our online boutique carries products for dogs, cats, birds, rodents and other pets! It's quick and easy. Check it out!
[insert link to eBoutique]

Reminder: You can now purchase all of your pet's products ONLINE. Quality. Speed. Simplicity. Happy shopping!
[insert link to eBoutique]

SET UP YOUR PURCHASE IN ADVANCE.
NO MORE FORGETTING!
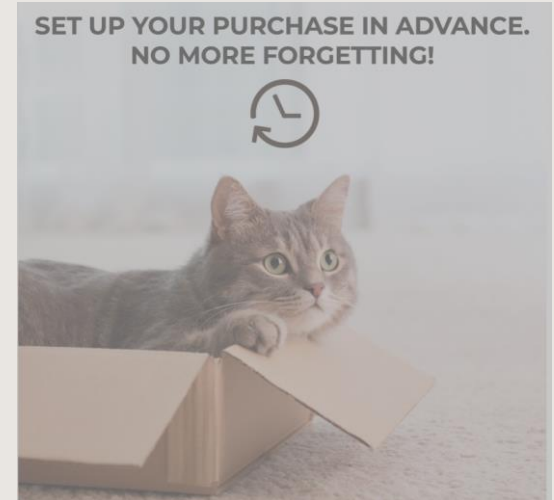
Chapter 6

Role: Boutique ambassadors

Role: Brand ambassador

Get your entire team talking about the online boutique!

"Did you know that you can now buy all these products for your animal(s) directly online? You can order these products on our online boutique and have the items shipped right to your door. We can complete your profile and create your account together."

Role: Brand ambassador (cont'd)

If the client's information was not updated on check-in, do so at check-out.

Offer incentives to keep the team excited about the online boutique.

Example :

Ask pet owners who referred them to the online boutique; reward the team member if they were the ambassador.