**Staff Management & Customer Service in the Ophthalmic World – CUSTOMER SERVICE**

*Service through the eyes of the customer & provider of services*

1. **What is it like to be a customer at your place of business?**
   1. What delights & irritates your customers?
   2. The difference between average & excellent service

2. **You provide the services; what is your impact?**
   1. Payoff in profit generated by excellent customer service
   2. Payoff in loyalty generation by excellent customer service

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**Learning Objectives:**

1. Analyze the business as a **customer & service provider**
2. Gather information through effective questioning & listening techniques, then build rapport with customers to promote long-term loyalty
3. Handle face-to-face and telephone interactions courteously & effectively

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**What is it like to be a customer at your place of business?**

What **DELIGHTS** your CUSTOMERS?

What **IRRITATES** your CUSTOMERS?

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**What is it like to be a customer at your place of business?** (cont.)

For the customer...

**PERCEPTION IS REALITY!!!**

**Difference between average & excellent service?**

- **CONNECT** with customers; don’t _PROCESS_ them!
  - They may be the 734th customer of the year for YOU, but this is THEIR FIRST VISIT!
  - Find some way to show the patient they are unique & noticed
    * “I love your earrings!”
    * “That’s a great jacket”
Whatever experience a customer has with you, they ASSUME happens every time. Customers don’t consider “AVERAGES”!
The fact that you charged 512 customers the correct price & miscalculated only ONE customer’s bill means NOTHING to the person you over-charged!

Average vs. Excellent Service

- **AVERAGE SERVICE**: The auto repair shop fixed your car for the price they estimated
- **EXCELLENT SERVICE**: They provided you a ‘loaner’ car while yours was in the shop AND they called a day after you picked up your car to be sure you were happy with the repairs
- **AVERAGE SERVICE**: The dry cleaners cleaned and pressed your clothes & had them ready on time
- **EXCELLENT SERVICE**: They greeted you by name when you came in and remembered that you like extra starch in your shirts

UNACCEPTABLE CUSTOMER SERVICE?

- Delays & missed deadlines
- Disorganization & careless mistakes
- Insensitivity to special circumstances
- Over-promising then under-delivering
- Poor attitude (ignored; patronized; insulted; or just generally “unconcerned”)
  
  Customers may forget exactly what you said or did...but
  
  THEY WON’T FORGET HOW YOU MADE THEM FEEL!

Four PILLARS of Customer Service

1. Friendly Service
   - **Smile** – eye contact – focus attention on customer
2. Flexibility
   - Give patient choices / ‘bend’ policies as needed
3. Problem Resolution
   - Solve issues **QUICKLY**!
4. Recovery
   - Apologize & **make things right**

You provide the services...what is your impact?

Payoff in **profit** generated by excellent patient service:
1. Happy patients come in more often
2. Happy patients spend more money
3. Happy patients share their experiences with friends & family (who then come see YOU!)
4. Business can spend less on advertising & promotions!

You provide the services; what is your impact? (cont.)

Payoff in **loyalty** by excellent patient service
1. When patients feel GENUINELY valued & appreciated, **they’ll return**
   - Saves 30% on ‘sales & marketing’ costs
2. The **lifetime value of ONE patient** is much greater than the cost of trying to replace them w/NEW patients
   - Increase in net profit by retaining pts? = 12%
   - It costs 5 times as much to get NEW patients as it does to keep the ones you already have!
Why do patients leave?

- **68%** go elsewhere because they feel “you” were **INDIFFERENT TOWARD THEM**!
- **15%** become dissatisfied for some other reason
- **13%** end up preferring your competition
- **3%** move away
- **1%** die 😞

Running the numbers...

- **Only 4%** of unhappy patients **COMPLAIN (to you!)**
  – (for every complaint you get, **24 MORE patients are unhappy** but haven’t complained!)
- **75%** of ‘unhappy-but-not-complaining’ customers **never return to your clinic**
- If you solve the COMPLAINING customer’s problem, **54%** will remain a customer
  – (Solve problem **QUICKLY?** **82%** will remain customers!)
- **UNHAPPY PEOPLE?** Personally **tell 10 others**
- **HAPPY PEOPLE?** Tell **5 others**

* Communication

1. **Questioning & Listening Skills**
   1. Asking the right questions to gather info to meet customer needs
   2. Listening well requires skills; patients want to be heard
2. **Building Rapport**
   1. Rapport – that elusive harmonious relationship of a brief encounter
   2. You are being judged! Tips to find favor with customers

Questioning & Listening Skills

Asking the right questions to gather info to meet patient needs:

1. Use **OPEN-ENDED** questions to collect information
   b. Can’t be answered with just **YES** or **NO**
2. Used **CLOSED** questions to gain agreement
   a. Now you are looking for **YES** or **NO** answers

Barriers to effective listening?

1. **Background noise** (phone, music, traffic, etc.)
2. Gadgets (cell phones & computers)
3. **Talking Speed** (average is **150 wpm**; some people go much faster!) Politely ask pt to “**slow down so I can understand completely**”
4. **Trying to take too many notes**
   – Only jot down key facts, names, dates, or numbers
5. Listening “filters” - we **tend to hear what we WANT or EXPECT to hear** – and we tend to **IGNORE** what we don’t want to hear

Questioning & Listening Skills (cont.)

Listening well requires skills; **patients want to be heard!**

1. **Attend with your body;** Acknowledge in words & body language
2. **Ask questions** to clarify; take notes
3. **Repeat key facts & details** to verify
4. **Summarize:** **Restate the message** to patient to verify you heard correctly & understand
Building Rapport

**RAPPORT** – a *friendly connection*; a harmonious relationship established during brief encounter
- Synonyms: *affinity*, *compatibility*, *harmony*, *agreement*, *bond*, hitting it off, same wavelength, simpatico
- Sometimes is just ‘happens’ when two people meet & *things ‘click’ between them*
- More often, it has to be developed, meaning you will have to **BUILD IT!**

**Building Rapport (cont.)**

You are being judged!

**Tips to find favor w/customers:**

1. **Use names** (“Norm!” from Cheers)
   - *Single most important thing you can do!*
2. **Avoid jargon** (NCT, AR, U&C charges, etc)
   - Irritates customers; does not impress them...at all!
3. **Respond to personal comments**
   - Specific situation, hopes, concerns, worries, etc.
4. **Agree (selectively);** diffuses anger

**Building Rapport: Tips to find favor with customers (cont.)**

5. **Empathize;** “feel” what the Pt is telling you; *acknowledge* the Pt’s *ideas, needs, feelings,* & *opinions*
6. **Accept responsibility,** don’t blame or complain
   - YOU represent the ‘company’, so **just FIX IT!**
7. **Explain,**; give status reports & follow through
   - Pt’s get frustrated/anxious in *absence of info*
   - No news is **NOT** good news to a Pt!

**Customer Interactions**

**Face-to-face**

1. Non-verbals communicate more than you think
2. Prompt greetings matter
3. Efficient & organized; first impressions = lasting impressions

**Telephone**

1. Etiquette – not just for the dinner table!
   - Creating phone ‘fuzzies’ not phone ‘fury’
2. What customers “see” on the phone when only a voice carries the communication load

**Customer Interactions: Face to Face**

**Non-verbals:** Communicate more than you think!

1. **POSITIVE** or **NEGATIVE** BODY LANGUAGE?
   a. **Eye contact:** creepy ‘staring’ vs. natural glances
   b. **Proximity:** intimate vs. personal vs. social space
   c. **Facial Expressions:** Pleasant; happy; confident; smiling
   d. **Gestures / Movement:** natural; smooth; flowing; arms open; relaxed (Pointing? Wagging finger? Tapping foot? Clicking pen? Touching? Sighing?)
   e. **Posture:** erect/straight; standing (not leaning on something); head upright; energy & enthusiasm

**NOTE TO PATRICK...**

**SHOW**

“State Farm”

**VIDEO!**
**Customer Interactions: Face-to-Face (cont.)**

*Prompt greetings matter (PGM!)*
- Starting off on the wrong foot here means *EVERYTHING* that comes after will be an uphill battle
- **Acknowledge me** as soon as possible!
  - "Welcome! (w/eye contact) I will be right w/you."
- **Silence?** Conveys a **NEGATIVE** message to patient

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**Customer Interactions: Telephone**

*Etiquette – not just for the dinner table!*
- **SMILE** when you answer the phone (really!)
  - Your voice will take on a more energetic, upbeat tone
- **IDENTIFY YOURSELF:**
  - 1) Name  2) Position  3) Company
- **BE PREPARED** (pen, paper, medical records, etc.)
- **TAKE COMPLETE MESSAGES**
  1) What did caller say or ask?  2) Time/Date of call
  3) How can caller be reached?

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**Customer Interactions: Telephone (cont.)**

What patients “see” on the phone when only a voice carries the communication load...

1) They have **no non-verbal “clues”** so your tone & words carry **ALL** the meaning!
   a. This is why you **SMILE** & show **INTEREST; it comes through in your TONE!**
   b. Background noise carries a message; what is your *office “saying”* when you use the phone?
2) Patients on the phone report feeling that they are **more likely to be ignored 😞**

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**Efficient & organized:**
- **First** impressions = *Lasting* impressions
- **Surroundings:**
  - Trash out of sight
  - Organized paperwork
  - Clean equipment / tools
  - Needed supplies on hand
  - **No odors!** (perfumes, tobacco, incense, or BO)
  - Distracting noises? (music, shredder, traffic, loud conversation nearby, printer, phone ringing, etc.)

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**Customer Interactions: Telephone (cont.)**

Some “rules” for telephone *ETIQUETTE*:

1. Transfer to CORRECT dept. or person
   a. Stay on line, explain situation; don’t make patient repeat themselves OVER & OVER again!
2. **ASK** if you can put them on HOLD; check back in **every 30 seconds**! (offer to call them back?)
3. **Pay attention** to caller (undivided attention); signals that you are listening by giving feedback

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**CUSTOMER SERVICE IN THE OPHTHALMIC WORLD**

**Summary & Conclusion**

*Today you learned how to:*

1. Analyze the business as a customer & service provider
2. Gather information through effective questioning & listening techniques, then build rapport with customers to promote long-term loyalty
3. Handle face-to-face and telephone interactions courteously & effectively

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