Client Screening: Attracting Your Perfect Clientele

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Have you ever found yourself reading a bad review of your practice online and wishing that the client would just go somewhere else? How about those times when you can overhear your Client Care Representative having a difficult conversation on the phone and you secretly cross your fingers that they won't book that person in for an appointment?

I think that we can all agree that some clients take up way too time and effort. Complaints, bad reviews and team frustration are just a few of the ways that a poor-fit client impacts our practices. Now think about your ideal client. You know, the one who listens to your every recommendation, understands the value that you provide and defends you every chance that they get? You're smiling, right? You can recall their name (and probably the name of their spouse and kids). You definitely remember all of their pets' names.

Now imagine an entire clientele made up of people like your ideal client – sounds perfect, right?

As veterinarians, we are all too happy to try and serve all types of clients, but that might not be the most effective choice for us. Moreover, is it fair to our clients? A client who is incredibly compliant, but wants time with the vet and team to discuss nuances of treatment is not going to be well-served in most high volume practices. A client who just "wants a rabies shot" and isn't interested in further education on the subject, is not going to be happy in a practice with a high level of preventative care. So how do we avoid these types of situations from occurring?

Screen your phone shoppers.

STEPS:

1 **You need to know what kind of practice you have.** Be honest and be specific. You're creating a description of your practice niche. Some examples of things to consider:

   a. How long are your appointments? Is there flexibility in your appointment length?

   b. What level of care do you actually provide?

   c. How accommodating are you when you are stretched and fully booked?

   d. What do you consider to be an acceptable wait time?

2 **You need to have an idea of who your ideal client is.** Again, be honest and be specific. Some examples of things to consider:

   a. How much time will this client take for an average appointment?

   b. Expectations for client behavior (showing up on time, no walk-ins, etc.)

   c. What kind of pet do they own?

   d. Expectations for pet behavior (are you willing to take on the anxious and fearful pets?)

   e. Client willingness to consider pet insurance/ability to pay for services

3 **Develop screening questions**

   a. Consider the communication skills of your team (is further training needed?)

   b. Don't screen out too many people – just the glaring bad fits – language will be needed to help direct those clients to a clinic that suits them better

   c. Be careful about "over-profiling" and making hard and fast "snap decisions"

4 **Monitor success**

   a. Survey clients – pick questions that give you good information, not just 5-star marks. Did you meet the client's needs?

   b. Monitor online reviews

   c. Train team members to monitor client satisfaction as part of the check-out process

As you progress with these techniques, you will need to fine tune your definition of your niche, as well as your screening questions. You can also start to screen your current clientele – the techniques are the same!