

Cx overview - the power of people. Those who pay you (clients) and those you pay (team). Creating a values-based culture

Values are invaluable

Your values define the practice and how it does business - they show potential clients why they should choose you to care for their beloved pet, as well as demonstrating to prospective team members why they should work for you.

Defining who you are and how you do things differently is crucial if owners and smallholders are to choose you over the competition. Aligning these values with real consumer needs is even better. Understanding your catchment area and target demographic will help you ensure that your values match those of your clients. Embedding them into everyone's job description and appraising the team against delivery of your values helps boost motivation and productivity. Living your values benefits everyone and drives footfall, which ultimately positively impacts on the bottom line.

Fundamentally your values should underpin every decision you make and every action you take, and your clients should be able to see them reflected throughout every aspect of your service and marketing. However, you can't just list five attributes that sound attractive, they have to be real and meaningful. Involve the team in creating your values - hold a workshop with everyone in attendance, facilitated by a third party agency if you want to get the most out of the process. By ensuring everyone contributes their ideas and shapes the outcome, you will define a set of values that not only reflect why your practice is special, but which everyone feels ownership for and commitment to.

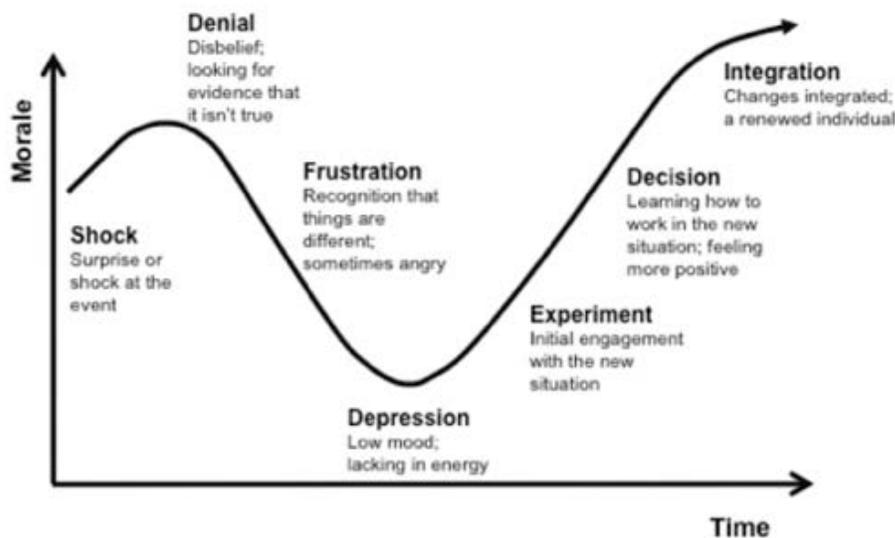
Managing change

The process of introducing values can sometimes be met with distrust or undermining behaviours. Obtaining buy-in for your vision and values from the entire team is essential if your value set is to be reflected in every conversation with every client, and at every touch point as they move through the practice. Engaging everyone, from receptionists, nurses and vets to practice managers will be key, but managing the introduction process smoothly first requires an appreciation of how people cope with change.

Change follows a predictable pattern - illustrated by the Kübler-Ross change curve, showing the main stages:

- Shock
- Denial
- Frustration / anger
- Depression / lack of energy
- Experiment - initial engagement
- Decision - feeling more positive about working in the new situation
- Integration

The Kübler-Ross change curve



Practical tools and processes to embed your values

Using 'Train Measure Manage' helps you deliver a great values-based customer experience. And consistently excellent customer care require focus and commitment:

- Train the team to the same standards to the same practice values
- Measure performance ongoing - what gets measured gets better
- Manage your team to keep motivation and performance levels high

Finding new team members with not only the clinical skills but also the communication and people skills to ensure they complement colleagues, engage with your values and prove popular with clients can be tough. Recruiting a new vet costs thousands and can take months, so it's crucial to get right - this is one key area where values are key. It's so important to recruit and develop team members who fit your practice, and with a few simple considerations you can minimise effort and optimise the chances of success:

1. Recruit people who fit with your practice ethos and share your values
2. Make your adverts eye-catching and reflect how it feels to work at your practice
3. Embed your values in the practice website, social media and all practice communications - not just as a list of words and phrases, but as real examples of the guiding principles in action
4. Focus on the non-clinical aspects of your potential colleague's skill set - the degree proves the person can do the surgery, emphasis on the softer skills such as empathy, confidence and enthusiasm are key when recruiting into a team
5. Create a comprehensive induction programme for new team members to embed them into the team and instil your values early on. Let them gain experience in every aspect of practice life and focus on the delivery of an excellent customer experience

Ultimately your values are your practice, without them you're just another business that fails to inspire loyalty and attract lifelong clients. Think of your values as a frame that supports the practice, not as a coat you lay over the top. Build from the core and your values will strengthen your team, delight your clients and really drive your practice forward.

Leadership not management

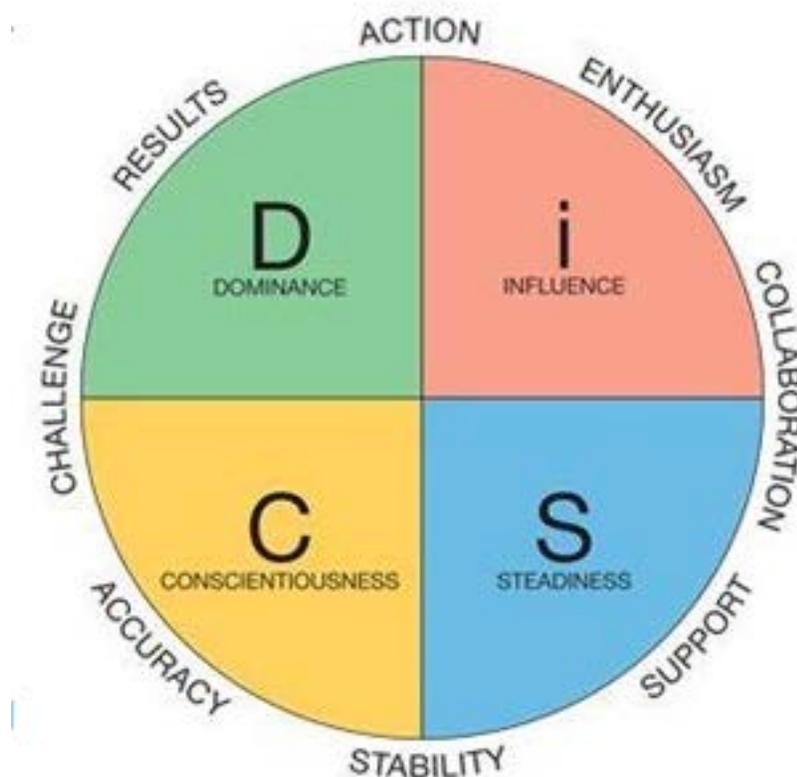
Managing people isn't the same as leading - teams deliver when they share the values of their organisation and managers, and are motivated to achieve excellence. Management style has a huge impact on business success, positively or negatively. If your team aren't delivering, it's time to take a good look at what you're doing and how it affects their productivity and passion. This session will help you get the basics of managing and leading right.

Leadership and management are crucially different, but both crucial

Managers at any practice are required to control people and / or processes in order to achieve a goal: 15% of clients signed up to the health plan, or team turnover rates down to <5% annually for example. On the other hand, 'leadership' refers to the way that you motivate and enable others to contribute towards success for the practice - influence and inspiration separate leaders from managers, not power and control. Practice values will play a significant role in defining your leadership - whether you're leading the nursing team or the entire practice, the values of the practice should guide your actions, and the needs of the client should underpin everything you say and do.

Understanding and influencing communication styles

In any team there will be different personalities and preferences; a wide range of behaviours and communication styles. Good leaders understand that they get the best out of colleagues when they flex their own communication style to complement that of the other person, and a good way to gain insight into these individual differences is by using the DiSC tool.



DiSC profiling is quick to undertake, simple to use and extremely accurate. The associated questionnaire takes just a few minutes to complete, and determines innate personality and behavioural preferences through four core areas:

- D Dominance, Challenge. D people are direct and strong-willed; assertive, to the point and just want the bottom line.
- I Influencing, Relationships. I people are engaging and great communicators; optimistic, friendly and talkative.
- S Steadiness, Consistency. S people are good listeners and great team players; steady, patient, loyal and practical.
- C Conscientiousness, Compliance. C people enjoy gathering facts and details and are always thorough, precise, sensitive and analytical.

The DiSC model finds that everyone's personality and behavioural style can be described using these four themes: you are either outgoing or reserved, and are either people or task orientated. Some people have a pure personality trait whilst many others have blends of two or more traits. Importantly, DiSC recognises that everyone is different - this isn't about putting colleagues in a box, rather about determining we are *predictably* different. Each of the four styles possesses a common set of characteristics and thus by understanding which ones shape your own preferences, as well as those of your colleagues, family and friends, you will be able to flex your style to reflect the preferences of others when it comes to:

- Strengths
- Motivators
- Fears

Practical leadership in action

Good leadership requires appropriate delegation, motivating the team by giving everyone a clear role and distinct boundaries and responsibilities. Each team member must have a job description that sets out the key aspects of the role and identifies how success will be managed. Annual appraisals should assess performance against these criteria, which should have practical elements grounded in the practice values. In an efficient practice there should be minimal overlap and no gaps between people and processes.

Managers then implement the strategies and actions that deliver the practice vision set out by the leadership team, once again using clear and consistent KPI measures and processes. Good managers enable regular communication between team members, both through formal team meetings and informal feedback loops. Good work should be openly praised, whilst any slips in performance should be discussed sensitively and always in the spirit of learning how to avoid the same mistake again. Sub-teams should also meet and communicate regularly (vets, nurses and customer care teams should all have their own regular meetings that feed into an all-practice meeting at least once a quarter).

Case study Glenbrae - measuring and improving clinicians' communication skills with ConsultTrack

In this session we'll share data from three-site Scottish practice Glenbrae Veterinary Clinic. The progressive management team are strongly focused on optimising communication between client and clinician and have seen great results after reporting and training programmes undertaken by Onswitch.

Clarity and consistency is key

In the age of Dr Google, clients are increasingly looking online for the answers to their pets' health care needs. Self-diagnosis and consulting with Internet forums and / or local paraprofessionals such as groomers, catteries, pet shops etc. are also likely to have taken place before the owner calls you or sets foot in the practice. All of which means that they are likely to be a little confused about what is best for their beloved pet. The very worst thing you can do is compound this confusion with your website giving different advice to your reception team, or your vets telling clients to just 'wait and see what happens in the next few days'. If an owner has contacted you, it's because she needs help, and the professional team at your practice should be best placed to give it. Clear advice and a consistent approach improve compliance with treatment regimes and help bond the client to the practice through a relationship of trust. Everyone in the team needs to be singing from the same price sheet!

7 Steps to better communication in the consult room

Perhaps the most important part of the client journey through your practice is their experience in the consult room - this is after all what they are paying for. Onswitch train and promote use of the 7 Steps - a simple and clear set of guidelines to help vets and nurses deliver superior consults, developed from the Calgary Cambridge model used in medical schools across the world. The model is based on the principle of building an open and trusting client / clinician relationship through a standard process - asking for information and listening to the client, collecting evidence through a physical examination, explanation of findings, recommendation and planning of next steps, followed by a decisive close:

1. Prepare yourself (make sure the room is clean and tidy, and the items you're going to need are close at hand - owners hate it when you leave the room mid-consult so read the notes and remind yourself what the patient is in for)
2. Create a rapport (introduce yourself, make eye contact, listen actively, engage in conversation and use the pet's name throughout)
3. Ask open questions (what, why, how - questions that require elaboration rather than a yes / no answer)
4. Carry out an obvious pet examination
5. Make clear recommendations (don't use phrases such as "I think..." "Perhaps we could..." and "let's wait and see...")
6. Check understanding and signpost next steps (studies show that compliance is good when owner and vet agree on the priority for the patient, but conversely it is poor when the vet does not address the owner's initial concern)
7. Book the next appointment / contact

Onswitch's monthly national ConsultTrack reporting tool measures consultation skill performance across the UK, with latest data showing a national average rating of just 38% out of

a possible 100%. It finds that step six, check the client's understanding and signpost next steps, is consistently the least-used.

Results from Glenbrae

The practice installed fixed cameras into consult rooms, notifying both the team and clients and ensuring that data captured was used confidentially and in line with UK data handling regulations. Collecting quantifiable data in this way has a number of benefits:

- Aiding personal development for the team by facilitating reflective learning
- Giving peace of mind to clinicians working alone late at night
- Providing evidence in the event of any customer complaints
- Monitoring and improving the customer journey

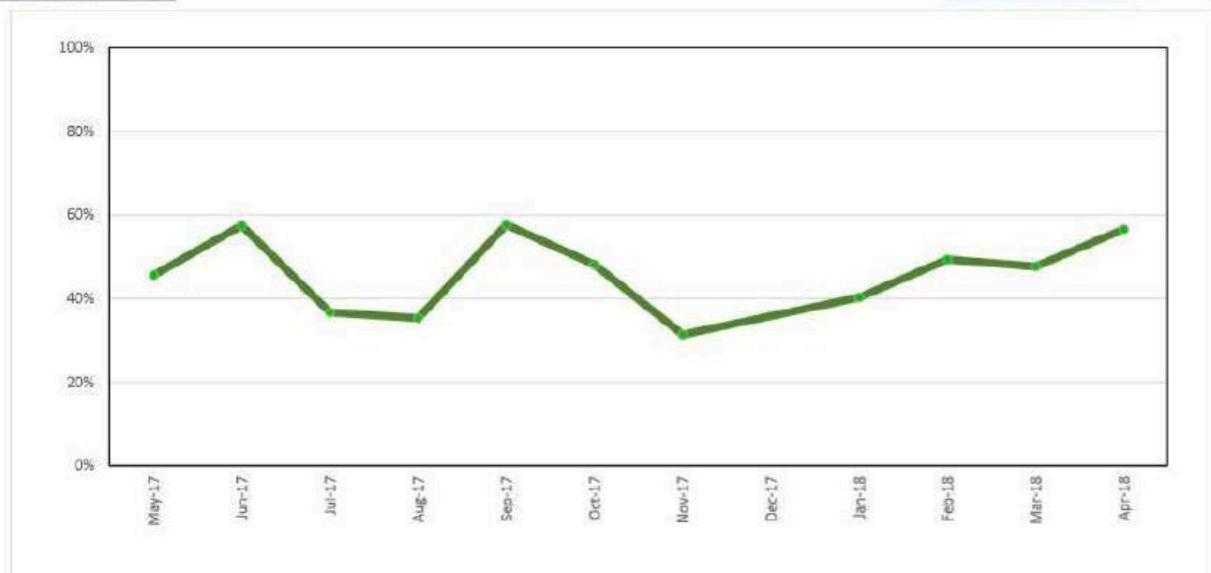
The main development areas evidenced through consult filming were as follows:

- Excessive length of consultations, especially revisits
- Clinicians talking to the computer, typing while the client talks
- Messy consult rooms
- Pre-consultation protocols not being followed
- Rooms not re-stocked by vets after use
- Little or no clear recommendations given
- Too much information, too many options provided
- Not showing clients out
- Poor communication and rapport



Glenbrae Group Overview

Apr-18



After initial apprehension from some of the team, vets and nurses now feel supported by, and supportive of, practice cameras and consult scoring. Onswitch scores data remotely each month,

providing detailed individual feedback for the team, driving improvements in the customer experience and boosting communication skills.

Common sense steps to clearer health care messages

Of course, time in the consult room is just part of the story, and the consultation must therefore be part of a seamless journey through the practice if it is to be fully effective.

Consistency and clarity can be achieved by taking simple, but effective, steps such as:

- Displaying prices clearly throughout the practice and on your website
- Ensuring new starters receive induction training in 'how we do things'
- Training the practice team together regularly in practical processes and team values
- Ensuring that everyone answers the phone using a recommended 5 Steps process to gather information efficiently and engage with the caller
- Focusing on key communication points such as the Pet Health Plan - everyone in the team should be clear how it works, what the benefits are and feel comfortable discussing it with every client
- Giving clear and detailed estimates about costs
- Explaining next steps appropriately and involve clients in making them
- Understanding the specific needs of every patient and client
- Exceeding their expectations

Case study Whitstable - successfully opening a brand new practice

In this session we'll explore the practical aspects of branding and launching a new practice, covering a wide range of topics including:

- Client communications
- The crucial role of values and ethos
- Recruiting team members that fit
- The role of social media
- Brand consistency
- Building word of mouth
- Realistic timescales
- Research and data collection
- Tools for measuring success

When husband and wife vet team Adam and Vicky Scutt decided to take the plunge and establish their own veterinary practice in Whitstable in the summer of 2016, they knew that branding would play a crucial role in raising awareness of the new practice and setting it apart from existing competitors. They also knew they needed expert help in building their brand and bringing it to life in a way that would immediately resonate with potential clients - in an area already well provided for, clients for the new business would have to be switched from their current practices and would therefore need strong reasons to do so (owners are notoriously slow to move unless they experience poor service).

Onswitch worked closely with Adam and Vicky through a series of crucial steps:

- Establish what kind of practice they wanted to create
- Undertake a detailed audit of the local demographic, mapping of competitor drive times and research with owners and local pet care businesses to establish that the pool of potential clients provided a good fit with the more premium positioning planned
- Produce mood boards and design concepts to capture the feelings / look / experience that the practice branding needed to bring to life
- Shape the practice's five core values:
 - Happiness
 - Sustainability
 - Community
 - Integrity
 - Friendliness

From here the practice ethos practically wrote itself, truly representing what Whitstable Bay Vets is about: 'We care for pets, their people and the planet'. And all of this happened before the logo was even designed!

When launching any new business, preparation and planning is key, along with a dogged focus on delivering an excellent customer experience at every client touch point. Unless you deliver a service that people actually want, and do it better than anyone else in the area, all the time, passion and money invested in your dream project will ultimately fail to deliver a successful commercial proposition. Thanks to an awareness building and client recruitment campaign that

began six months before the doors opened, Whitstable Bay Vets had paying customers on day one, and an average of 100 new clients have registered with the practice every month since.

With the opening of any new practice, there are usually three phases of activity:

1. Six months before opening.
Undertake design work, branding, values, website and social media building and local 'coming soon' communications via mail drops, local magazine editorials and banners on the building
2. 0-12 months of operation.
A sustainable practice requires 1,000 active clients for each Full Time Equivalent vet. Whilst this can take time to establish, it is crucial that within the first year there are at least 1,000 active clients on the practice books. It is vital that a new practice identifies which local competitors they will switch from, and which messages and media must be used to target them. In the UK there are two and a half times as many practices as there were in the year 2000, but roughly the same number of pets - any new practice will not simply absorb new owners, but rather must actively switch them from their current practices
3. Year two.
Activity in the second year of operation is about building the client base, adding a further 1,000 active clients to allow owners and vets to recruit permanent colleagues and limit dependence on locums to cover holidays and sickness

Typical pre-launch client communication process:

6 months before opening day

- Announcement on practice website and social media that a new site is opening
- Design and produce leaflets, posters and mail drops to be sent out three months before launch
- Ensure all brand messages and imagery is consistent across all sites
- Design and order any promotional materials: dogdanas, jute bags etc.

3 months before opening day

- Website begins taking new client registrations
- Coming soon banners outside the new building, targeting passing traffic
- Target the southern aspect of the drive time catchment area with mail drops to Key Opinion Leaders
- Facebook adverts
- Mail drops to houses in catchment area (1 in 2 households have a pet, all know someone who does. Low cost)
- Run a 'Register now and get x' campaign via social media

1 month before opening day

- Countdown banners outside the practice
- Social media countdown to launch day
- Press release to local media
- Hand out recommend-a-friend cards to all current clients when they visit

Opening day

- All team members wearing uniforms and name badges (and big smiles!)

- Hand out recommend-a-friend cards to all clients and visitors

1 month after opening day

- Communicate forthcoming practice Open Day / Fun Day via Facebook, posters and adverts / advertorials in local press
- Ask clients to leave reviews on social media and online
- Hand out recommend-a-friend cards to all clients
- Approach local media to feature the new practice

3 months after opening day

- Hold a practice Open Day / Fun Day - stalls, competitions, see behind the scenes, gift for every pet attending, bring a friend etc.
- Ask clients to leave reviews on social media and online
- Hand out recommend-a-friend cards to all clients

Lessons from Whitstable Bay Vets

The practice is built on five core values, and crucially these are evident in everything the team do - giving Whitstable Bay Vets a clear USP locally, driving client bonds and building loyalty. Vicky credits 'having an awesome team, especially the RVNs' as a key contributor to the practice's early success - indeed, the practice head nurse won 2018's Petplan Pet Health Counsellor of the Year award, selected from hundreds of entrants across the UK.

Three years in and the two-vet practice now has 3,500 active clients on its books, way ahead of the 1,000 per Full Time Equivalent vet needed for sustainable practice. The practice has grown rapidly through a clear and consistent focus on brand values and service quality - at the time of writing Google reviews show a rating of 4.9 from 82 reviews, with Facebook rating the practice 5.0 from 86 reviews.

Attracting and retaining the right people

Engaged team members are more productive and more likely to stay

Employee engagement impacts hugely on practice profitability and productivity - understanding what your team want, and delivering it, is therefore key for any practice manager or team leader.

Measuring engagement with the Gallup Q12

Gallup research has quantified the massive impact employee engagement has on attendance, productivity, profitability and accident rates. The Gallup Q12 survey is used across the world in businesses large and small - a simple questionnaire is hosted online and filled in anonymously by the team, with space for suggestions and comments. The wording and order of the twelve questions have been crafted to return the most accurate measurement of employee engagement, and ensure data is robust and comparable over time. Each of the twelve questions is answered on a scale of 1 to 5 (where 1 is strongly disagree and 5 is strongly agree), thus capturing the nuances of personal experience and highlighting strengths and opportunities for the practice.

Employee engagement is a key metric for all businesses to measure and track. Gallup research proves that engaged individuals have:

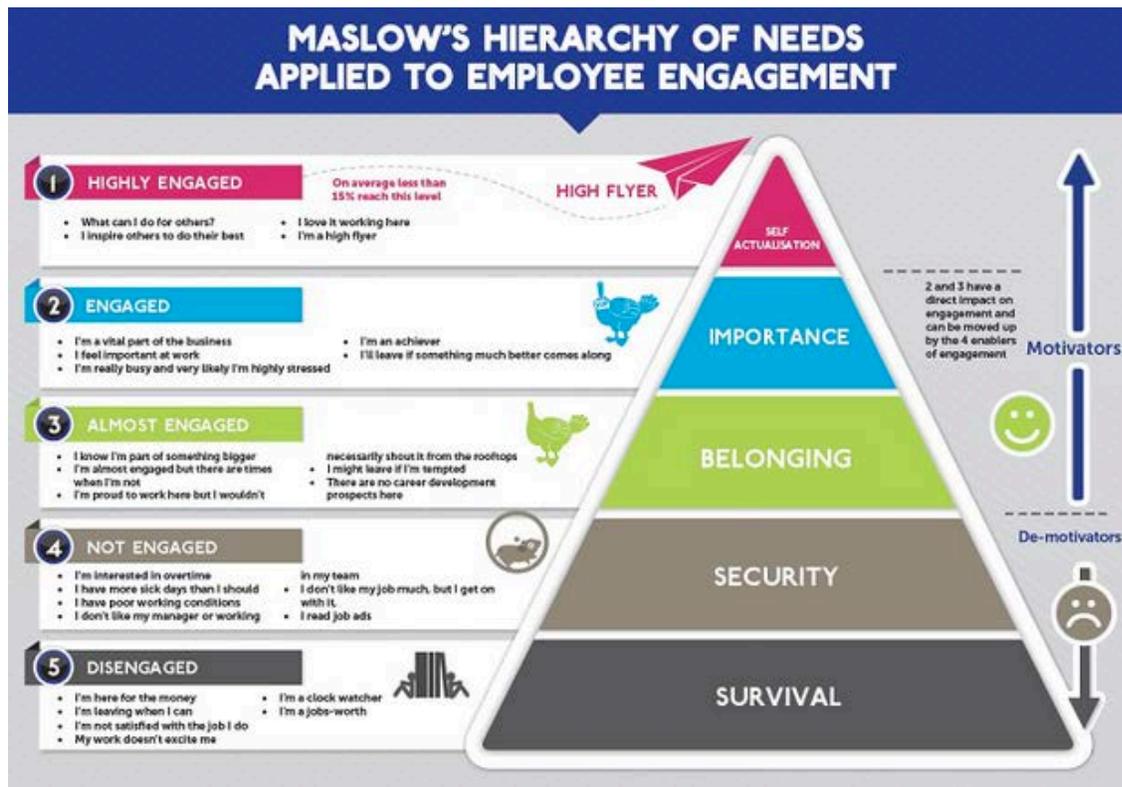
- 37% lower absenteeism
- 21% greater productivity

Engaged teams perform better too, with:

- 25% less turnover
- 22% improved profitability
- 41% fewer patient safety incidents
- 10% higher customer metrics, delivering a superior experience for clients

Engaged people are motivated by the values of the business and work together to deliver great things. However, contrary to popular belief, engagement isn't delivered through generous salaries and benefit schemes, it comes when people feel respected and listened to, when they can see that they are supported by managers and colleagues and feel inspired to push for excellence. In the veterinary sector recruitment is time consuming and costly, so it makes sound business sense to invest the required effort in keeping the good people you already have. Engaged people will also recommend your practice to their network, bringing in like-minded great people without the time, expense and effort of a full recruitment cycle.

Levels of engagement can be linked to a basic hierarchy of employee needs - having just enough personal boxes ticked results in a very low level of team belonging, with disengaged members of the practice team just barely surviving at work:



Practical steps to boost engagement

- Commit time, money and focus to developing a comprehensive induction programme, for every new member of the team. This programme should place equal importance on how to do things, not just what to do; setting out practical examples of what great customer care looks like (always use the animal's name when sending out booster reminders, for example). It should include hands-on training in optimising the customer experience both over the phone and face to face, with regular refresher sessions undertaken by the whole team.
- Find out when your busiest times of day are on the phones (it's probably Monday morning!) and put extra staff on accordingly.
- Answer the phones away from the front desk so that your customer care teams have dedicated jobs and can give their full attention to either answering calls or helping owners in the practice; not doing both at once, and consequently doing neither particularly well.
- Ensure that everyone in the team is engaged with, and motivated by, your business' vision and mission. If you don't know what makes your practice special and unique, how are your team, or your clients, supposed to? Your vision should shine through every aspect of your communications and service and underpin everything you do; brought to life in every communication with your clients by the team (remember how crucial people are to the customer experience.)
- Annual appraisals and bi-annual development reviews should be in place for every member of the team; with performance goals clearly pegged to customer care delivery and fit with the practice vision.
- Regular team meetings keep everyone informed of practice priorities and values, whilst ongoing training, both face-to-face and online (using tools such as www.cxclub.care) ensures that vets, nurses and customer care colleagues all have the skills and the confidence to market the practice effectively in every conversation with every client.

Recruitment - top ten tips

When it comes to looking for a new role, research proves that actually vets just want fair pay for fair hours. They are increasingly looking to achieve a positive work - life balance through flexible working, allowing them to accommodate other interests, hobbies and family commitments. This session will share UK and Australian research with undergraduates and newly qualified vets to help you better shape your own employment and support provision to match the changing needs of your team. The UK experience proves that if you want to build a stable, strong team, it's time to connect with future colleagues today.

Vets' expectations have changed, but practices haven't

The last major national study in the UK into veterinary recruitment, 2015's vetfutures research project, concluded that the three factors with the greatest bearing on choice of career for students and new vets are:

1. Intellectual satisfaction
2. Location
3. Supportive environment

These findings are backed up consistently by Onswitch's own research with newly qualified vets and undergraduates - they are looking for a fulfilling job with a social support network (family and friends nearby) and with enough experienced colleagues to ensure that help and encouragement are available as required.

Gallup has been measuring employee engagement for decades. Its data is very clear - building strong connections between employees and their work / colleagues delivers benefits for both parties. Creating a team-centred culture is crucial in recruiting and retaining great people, but it's not just forcing people to take turns bringing cakes in once a month, it's about building a relationship of trust.

Finding team members with not only the clinical skills but also the communication and people skills to ensure they complement colleagues and prove popular with clients is so crucial. Recruiting a new vet costs thousands and can take months, so it's vital to get right. In this session we'll look at some basic principles for recruiting and share top tips to help you minimise effort and optimise results.

1. Reply to all applicants and give feedback
2. Recruit people who fit with your practice ethos and share your values
3. Focus on the non-clinical stuff - emphasise softer skills such as empathy, confidence and enthusiasm, key when recruiting into a team
4. Use EMS placements to check out potential future colleagues and build your practice's reputation as a great place to work
5. Develop a structured New Graduate programme to support and develop recently qualified vets into competent and effective colleagues
6. Make your adverts eye-catching and reflect how it feels to work at your practice - this is what new graduates are looking for, not a list of kit. Talk about the RVN team
7. Ensure your website reflects the vibrant, supportive and unique place your practice is
8. Promote the unique and special aspects of your location

9. Create a comprehensive induction programme for all new team members that will embed them into the team and the role early on, gaining experience in every aspect of practice life and focusing on delivery of an excellent customer experience
10. Embrace recruitment apps such as GuavaVet to reduce money spent on agency fees

In the UK veterinary recruitment is increasingly taking on a more disruptive approach. At Onswitch we tell clients to encourage sixth form work experience students, offer vet student placements and graduate schemes - all great ways for practices to 'grow your own'. We know that more and more younger vets are choosing to locum, valuing the flexibility it offers. Locuming offers flexibility and new experiences, but be aware that there are some downsides for you as a locum - unfamiliarity with protocols and clients can be stressful, team support networks are lacking, colleagues may treat you with disdain as an outsider.

Tools such as the GuavaVet app match requirements to available roles very effectively. Working like a dating site, GuavaVet aligns the expectations of both vet and practice to give the best chance of success. Choosing a role that allows flexibility has never been easier - we advise vets to think about the hours they'd like to work and the sort of career they'd like to have and don't be afraid to be honest about these with prospective employers. Mismatched expectations are perhaps the biggest cause of breakdown in employer-employee relations, so both sides should aim to do all they can upfront to minimise the chances.

Quantitative research undertaken with hundreds of UK vets by Onswitch and GuavaVet in March 2017 finds that:

- Flexible working is increasingly attractive (19% of vets now work part-time)
- Locuming is now an active and attractive lifestyle choice, not the last available option that it once was
- Half of locum vets do not use an agency to find work, instead calling on a network of personal contacts and recommendations from friends and colleagues
- A third of locums work between 1 and 7 days a month with a quarter working more than 22 days a month
- The most popular advertising channel for recruiting vets and VNs is online (69.5%)
- Many practices no longer advertise due to disappointing experiences in the past - not enough quality candidates, poor response and too expensive.
- 16% of practices have spent over £5,000 on vet recruitment in the last year
- By contrast, when it comes to recruiting for RVNs, 57.8% spent below £500 on recruitment, with just 4.3% having spent over £5,000. Clearly in the UK, RVN recruitment does not enjoy the same level of financial support and focus as vet recruitment does