



# Mastering Difficult Client Conversations

Staff Video Guide

# Mastering Difficult Client Conversations

## Staff Video Guide

Welcome to *Mastering Difficult Client Conversations*. In this course, we will equip you with a process that you can use to successfully handle almost any challenging client interaction. These tools can help client conversations go more smoothly and reduce, or even eliminate, difficult interactions. Confident and successful client conversations are essential for providing top medical care to patients and the best service for your clients.

As you watch the course video with your team, you'll be asked to stop periodically and complete activities. Pages 3-26 of this guide provide instructions for each activity along with a place to capture your answers. The activity type is indicated by an icon and a bold heading.



### **Group Activity**

Group activities are meant to be completed with your teammates, which means everyone - including you - should participate in the discussion.



### **Paired Activity**

Paired activities are meant to be completed with a partner.



### **Individual Activity**

Individual activities are meant to be completed by yourself. In some cases, you will be asked to share your answers.

In addition to a place to capture your answers during activities, this course guide includes:

- An overview of a five-step process you can use to handle almost any difficult client conversation (page 2).

After completing this course, we hope you feel more comfortable and confident when engaging in difficult client conversations.

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### Learn the Process

Client conversations are a big part of veterinary medicine, and sometimes, they can be challenging. There are a lot of reasons why a client conversation might become difficult, but there are also simple steps that you can take to handle almost any challenging client interaction.

1

#### **Step 1: The Pregame**

Prior to speaking with your client, pose questions to yourself that are client-focused and reflect on and reframe negative assumptions you may have.

2

#### **Step 2: Listening Questions**

Use listening questions to more completely understand your client's perspective.

3

#### **Step 3: Partnering Questions**

Use partnering questions and statements to show clients that you are working with them, not against them, to solve the problem.

4

#### **Step 4: Getting to the Solution**

Use solving questions to help determine the most appropriate solution.

5

#### **Step 5: Follow-up**

Follow up with your client to ensure problem resolution.

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### ACTIVITY 1

#### **Individual Activity with Discussion**

Answer the question below. Be prepared to share your answers.

What are you hoping to learn about difficult client conversations during today's meeting?

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### ACTIVITY 2

#### Group Activity

Answer the questions below as a group.

What are your reactions to how different approaches during challenging client conversations can affect your practice?

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Are there any other effects that were not mentioned in the video?

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### ACTIVITY 3

#### Individual Activity

Answer the question below.

Successful client conversations require preparation. Taking time to complete your “pregame” can help you see the issue from your client’s point of view and reframe any assumptions you may have.

Use the table below to reflect on your thoughts and assumptions about your clients. How can they be reframed to be more understanding or compassionate towards clients? Use the example as a guide.

Negative Client Assumption	Reframed Assumption
<i>Our afternoon clients never show up on time.</i>	<i>I know some of our afternoon clients show up late, but it's difficult to get to our office during rush hour.</i>

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### **ACTIVITY 4**

#### **Individual Activity**

Answer the questions below.

Think about a time when you had an emotional reaction. What emotional or physiological responses did you have? How long did it take for you to calm down?

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## **ACTIVITY 5** **Paired Activity**

Discuss the questions below with a partner.

Have you ever used listening questions with a client? What was the result?

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### **ACTIVITY 6**

#### **Individual Activity**

Answer the questions below.

Do you think clients consistently view you as a partner? Why or why not?

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What can you do to be seen as a better partner?

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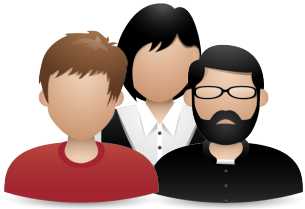
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### **ACTIVITY 7**

#### **Group Activity**

Answer the question below as a group.

When you've interacted with an upset or frustrated client, what signs have you noticed that let you know they are ready to move forward with a solution?

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### ACTIVITY 8

#### Group Activity

Answer the questions below as a group.

Have you ever dealt with a situation that needed an informational or transactional solution?  
What happened and how did you handle it?

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Would you handle the situation the same way now, or would you handle it differently?

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### ACTIVITY 9

#### Group Activity

Answer the questions below as a group.

Have you ever dealt with a situation that needed an additional resource solution? What happened and how did you handle it?

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Would you handle the situation the same way now, or would you handle it differently?

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### **ACTIVITY 10**

#### **Individual Activity**

Answer the questions below.

Have you ever dealt with a situation that needed a relationship solution? What happened and how did you handle it?

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Would you handle the situation the same way now, or would you handle it differently?

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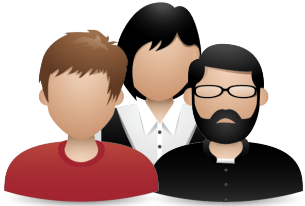
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### **ACTIVITY 11**

#### **Group Activity**

Answer the question below as a group.

Do you have any additional ideas for how the team can better follow up with clients to ensure they are satisfied with how the situation was handled?

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### **ACTIVITY 12**

#### **Individual Activity**

Answer the questions below.

Think of a time when you had to discuss an uncomfortable topic with a client. What happened and how did you handle it?

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Did you prepare for the discussion beforehand? Did you ask clarity questions?

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Would you handle the situation the same way now, or would you handle it differently?

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## **ACTIVITY 13**

### **Individual Activity**

Answer the questions below.

Have you ever made assumptions or judgments about money? If so, do you feel this affected the information or support that you offered to the client?

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### ACTIVITY 14

#### Paired Activity – Role Play

Work with a partner to complete the role play activity below.

Client conversations are a big part of veterinary medicine, and sometimes, they can be challenging. There are a lot of reasons why a client conversation might become difficult but there are also simple steps that you can take to handle almost any challenging client interaction. Practicing these steps will help you become more comfortable at successfully engaging in and tackling these conversations.

#### Overview

In pairs, practice preparing for and executing difficult client conversations. Each person will have the opportunity to play the role of the team member and the client.

If you are the **Team Member**, prepare how you would approach a difficult conversation using pregame preparation, questioning techniques, identifying solutions, and providing follow-up.

If you are the **Client**, you will have two jobs. First, use the scenario that you've been given to engage with your partner as if you were having an emotional response, such as anger or frustration. Second, listen closely to your partner and provide them with constructive feedback on their approach to this difficult conversation.

#### Scenario 1 – Running Behind Schedule

- Team Member: p. 17-19
- Client: p. 20

#### Scenario 2 – Surprising Test Results

- Team Member: p. 21-23
- Client: p. 24

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### Scenario 1 – Running Behind Schedule

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#### Role: Team Member

**Directions:** If you are playing the role of the team member, carefully read the scenario below. After reading the scenario, use the ***Difficult Client Conversations Discussion Template*** on pages 18-19 to reflect and prepare for the conversation with your partner (the client).

When you and your partner are ready to start, let your partner (the client) begin by stating the problem or issue. During the conversation, refer to the ***Difficult Client Conversations Discussion Template*** as a guide.

After the conversation, give your partner the opportunity to provide constructive feedback on what you did well and suggestions for improvement. You can record any feedback, notes, or suggestions in the ***Feedback Form*** on page 25.

It is 5:25 p.m. on a Friday afternoon. You have had a tremendously busy week and today is no different. You have been on your feet all day, handling back-to-back appointments including a snapping Chihuahua and an aggressive Siamese. You are looking forward to ending your day with the last appointment at 5:30 p.m.

Just then, a client rushes in with her Springer Spaniel who ate a party-size bag of M&Ms. You immediately work to calm the owner and begin the process of caring for the dog. You patiently explain that you must consult with the doctor before bringing the dog back to be seen. While speaking with the owner, you see the doctor down the hallway, packing up their things to leave for the day. You have a good working relationship with the doctor, but still worry about their reaction to the news that they will have to stay late tonight.

Meanwhile, the 5:30 p.m. appointment just walked through the door, but you are the only one currently available to tend to the sick dog. While you walk away to talk with the doctor, you wonder how the waiting client will react to this unexpected delay.

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### Difficult Client Conversations Discussion Template

**1** **The Pregame** – use questions to see the situation from your client’s perspective.

Consider: *What level of service do I expect when I go to an appointment? What information would help me to be more understanding if my appointment did not start on time?*

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**2** **Listening Questions/Statements** – use listening questions and statements to completely understand the client’s perspective, let the client feel heard, help them move from an emotional state, and let the client see you as a partner.

Write a listening question/statement that you might use with this client:

*Example: Tell me more about how you are feeling right now.*

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**3** **Partnering Questions/Statements** – use partnering questions and statements to let your client know that you are working with them, not against them.

Write a partnering question/statement that you might use with this client:

*Example: What else do I need to know about your experience today in order for us to make it better next time?*

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**4 Solving Questions** - use solving questions to move forward with a solution together.

Write a solving question that you might use with this client:

*Example: I would like for us to work together to make the rest of your appointment a pleasant one. Can we do that?*

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**5 Solutions** – determine which solution(s) would be most appropriate for this situation: informational solution, transactional solution, additional resource solution, or relationship solution.

What solution(s) do you feel is best for this situation?

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**6 Follow Up** – follow up with your client to ensure problem resolution.

How would you follow up with this client?

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# Mastering Difficult Client Conversations

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### Scenario 1 – Running Behind Schedule

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#### Role: Client

**Directions:** If you are playing the role of the client, carefully read the scenario below. After reading the scenario, imagine how you might react if you were in the same situation. Would you be upset, angry, or frustrated?

When you and your partner are ready to start, you will begin the conversation by stating the problem or issue. Remember, you are playing the role of a client who is experiencing an emotional response, so let your words, actions, and body language reflect this.

After you and your partner finish this role play, provide constructive feedback to your partner on how they handled the conversation. Describe what they did well and provide specific, detailed suggestions for improvement. You can record any feedback, notes, or suggestions in the **Feedback Form** on page 25.

What a week! You've been working overtime to meet a critical deadline on a high-profile project. You rushed to hand over the project this afternoon because you had to leave early to get your dog to the vet's office for her annual exam. Your work schedule can be tricky to navigate with never-ending conference calls and unexpected travel, so fitting in today's appointment was no easy task.

You are right on time, which is great because you need to wrap up this appointment, get home, get changed, and make it back out for a dinner across town. When you walk up to the front desk to check in, you are told that the staff is running behind and to take a seat. You aren't given any time frame for when to expect to be seen and you feel yourself begin to tense up as you wonder if you'll make it to your dinner on time.

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### Scenario 2 – Surprising Test Results

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**Role: Team Member** (Veterinarian)

**Directions:** If you are playing the role of the team member, carefully read the scenario below. After reading the scenario, use the ***Difficult Client Conversations Discussion Template*** on pages 22-23 to reflect and prepare for your conversation with your partner (the client).

When you and your partner are ready to start, you will begin the conversation. During the conversation, refer to the ***Difficult Client Conversations Discussion Template*** as a guide.

After the conversation, give your partner the opportunity to provide constructive feedback on what you did well and suggestions for improvement. You can record any feedback, notes, or suggestions in the ***Feedback Form*** on page 25.

Last week you saw a terrier mix, Rex, for a wellness exam. The owner said that Rex gets regular exercise, has a good appetite, and doesn't take any medications other than a heartworm preventative. The physical exam revealed no significant health concerns and overall, he seemed like a happy and healthy dog.

As part of the wellness visit, you also ran a routine blood test. Today, you received the results back from the lab showing elevated liver enzymes and you suspect that Rex may have some type of liver disease. You think it is best to move forward with an abdominal ultrasound and a bile acid test in order to make a conclusive diagnosis.

You pick up the phone to call Rex's owner and share the lab results along with your recommendation for follow-up testing. You expect this news will come as a surprise to the owner since Rex isn't showing any outward signs of illness, not to mention the additional testing and ultrasound will cost several hundred dollars.

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### Difficult Client Conversations Discussion Template

1

**The Pregame** – use questions to see the situation from your client’s perspective.

Consider: *What would I want to know if this was my pet? What does the client need to understand about the additional testing that will help them to see its value?*

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**Use your reflection during the pregame to prepare for how you will begin the conversation with your partner (the client). Below is an example of how you might start:**

*Hi. I’m calling as a follow up to Rex’s wellness exam. I just reviewed his blood test results and noticed elevated liver enzymes. This may be an indication that Rex might have some type of liver disease. This may come as a surprise to you because from outward appearances, he looks great. To ensure that I diagnose Rex accurately, my recommendation is that we schedule a time for you to bring him back in for an abdominal ultrasound and a bile acid test. These tests will give me valuable information to make sure we give Rex the best possible treatment.*

2

**Listening Questions/Statements** – use listening questions and statements to completely understand the client’s perspective, let the client feel heard, help them move from an emotional state, and let the client see you as a partner.

Write a listening question/statement that you might use with this client:

**Example:** *Tell me more about your thoughts and feelings regarding the information that I have shared.*

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**3 Partnering Questions/Statements** – use partnering questions and statements to let your client know that you are working with them, not against them.

Write a partnering question/statement that you might use with this client:

*Example: I would like to work together to figure out the best path forward for you and Rex.*

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**4 Solving Questions** - use solving questions to move forward with a solution together.

Write a solving question that you might use with this client:

*Example: Are you ready for us to talk more about the next steps for Rex?*

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**5 Solutions** – determine which solution(s) would be most appropriate for this situation: informational solution, transactional solution, additional resource solution, or relationship solution.

What solution(s) do you feel is best for this situation?

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**6 Follow Up** – follow up with your client to ensure problem resolution.

How would you follow up with this client?

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# Mastering Difficult Client Conversations

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### Scenario 2 – Surprising Test Results

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#### Role: Client

**Directions:** If you are playing the role of the Client, carefully read the scenario below. After reading the scenario, imagine how you might react. How might your personal challenges and experiences affect how you react to unexpected or upsetting news?

When you and your partner are ready to start, your partner (the team member) will begin the conversation. Remember, you are playing the role of a client who is receiving unexpected news and experiencing an emotional response, so let your words, actions, and body language reflect this.

After you and your partner finish this role play, provide constructive feedback to your partner on how they handled the conversation. Describe what they did well and provide specific, detailed suggestions for improvement. You can record any feedback, notes, or suggestions in the **Feedback Form** on page 25.

Your terrier mix, Rex, is such a good boy! He just had his wellness visit with your veterinarian last week and your understanding was that he passed with flying colors. You are grateful that Rex is healthy; it is positive news in what has turned out to be a very difficult year.

At the beginning of the year, your employer of more than 10 years went through a downsizing which caused you to get laid off. Luckily, you found a new job, but you're still working to get adjusted. On top of a career change, a close family member was diagnosed with a serious, but treatable illness which has left you shaken. Throughout the stress of this year, Rex has been your rock and your companion.

Your phone rings and you see your veterinarian's phone number on the caller ID.

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### Feedback Form

#### Scenario 1 – Running Behind Schedule

Select the role that you played for this scenario:

- Team Member
- Client

Feedback:

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#### Scenario 2 – Surprising Test Results

Select the role that you played for this scenario:

- Team Member
- Client

Feedback:

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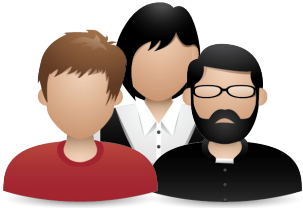
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## **ACTIVITY 15** **Group Activity**

Take a minute to answer the question below as a group.

What is one change you plan to make during your next difficult client conversation?

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