

RETHINKING FRONT DESK MANAGEMENT

Speed metrics, annual feedback, and task checklists are no longer enough. Here's a better framework for developing your client service representatives.

BY LOUISE S. DUNN



The point of entry to your practice is more than just a “front desk.” It’s a client experience hub. It’s an emotional and operational hub. The client service representative is the face and gatekeeper for all operations, as Dr. Kathryn Primm, owner of Applebrook Animal Hospital in Ooltewah, Tennessee, has pointed out. For years, these vital team members have been evaluated primarily on speed and call handling. But as practices face changing client expectations, some leaders are rethinking how they manage CSR performance.

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Today’s front desk teams are not just schedulers; they are revenue drivers, compliance influencers, brand ambassadors, and anchors of client retention. Reimagining how we measure, coach, and develop CSR performance may be one of the most overlooked — yet most impactful — levers for sustainable practice growth.

Time for a Change

Several factors are driving the need for change in how we manage and measure the success of our client service team:

► Outdated annual reviews:

In a world where business models, client expectations, and medical standards evolve almost daily, annual reviews deliver feedback that is too late to be helpful and often lacks actionable coaching for the issue at hand. Many CSR reviews overemphasize speed — calls per hour or check-in times — and overlook the quality of the interactions, ignoring what today’s pet owners value most.

► Increased technology use:

The integration of technology and artificial intelligence tools is dramatically changing how client service representatives perform job tasks. Automating appointment bookings, reminders, call routing, and payment processing can free up the CSR to focus on high-value interactions that require empathy, judgment, and communication skills, thereby reshaping the key competency framework and shifting the CSR role from task executor to client experience manager.

► Ongoing turnover and burnout:

Burnout plagues the industry. CSRs, technicians, and assistants have a higher turnover rate — 23% to 33% — than practice managers or veterinarians. The Merck Animal Health Veterinary Wellbeing Study found that the support team faces

serious psychological distress, even more than veterinarians. The study also reported that about 20% of receptionists experience burnout. These issues may be exacerbated by a gap between what is expected, the support and recognition given, and how performance is measured.

If practices don’t evolve — and if they ignore the pressures on CSRs — it will affect more than just the practice’s profits. It will also affect team morale, client experience, and access to care.

How to Improve Your CSR Performance Management

Recognizing that CSR performance management must change is only the first step. Leaders must redesign the system to support growth, strengthen client relationships, and improve operational outcomes. Here are three strategies to consider.

1 Replace the Annual Review With Continuous Coaching

As if looking in a rearview mirror, annual reviews leave little room for growth or for real-time support to meet the demands of the CSR role. In

contrast, frequent micro-feedback loops focus on recent interactions with clients and team members.

Imagine a supervisor quietly saying at the front desk, “Nice job calming that upset client, Sam. Your patience made all the difference.” Combining daily affirmation of a CSR’s performance with weekly or monthly CSR meetings is a better way to provide feedback than a yearly review, which is often a snapshot of past performance, according to Tim Burns, account manager at Granite Peak Veterinary Advisors. When giving feedback, focus on key skills like empathy, clarity, and conflict resolution to shift the conversation toward growth and development rather than discipline.

Coaching works best when it happens regularly and focuses on each person’s growth needs. Trisha Jones, a certified practice manager and customer development specialist at Elanco, encourages client service representatives to set personal growth goals and business goals that focus on patients, clients, and the practice. Coaching should help CSRs reach these goals, address challenges, and find areas to improve, using the appreciative inquiry technique.

BETTER QUESTIONS, BETTER RESULTS

Appreciative inquiry is a strengths-based coaching and organizational development approach that shifts the focus from problem-solving to possibility-building. Rather than asking “What’s going wrong?” it asks “What’s working, and how do we do more of it?”

Developed in the 1980s by David Cooperrider and colleagues at Case Western Reserve University, appreciative inquiry has since been applied widely in workplace coaching, team development, and culture change initiatives.

In a CSR coaching context, appreciative inquiry might sound like: “Tell me about a client interaction this week that went really well. What did you do that made it work?” From there, the coach helps the employee identify the specific behaviors and strengths to replicate and build on.

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One of the most underutilized tools in performance management is the daily huddle. Many practices use the huddle solely for scheduling updates, missing the opportunity to use it as a powerful performance tool. The huddle creates a space for real-time coaching, clarifying workflow expectations and addressing small issues before they become larger problems. Small course corrections happen quickly. Recognition is immediate. Coaching feels natural instead of intimidating.

Tammy Tyndall, practice manager at Willow Grove Animal Clinic in Farmville, North Carolina, believes that annual reviews remain valuable, but management should also prioritize looking ahead to identify ways to improve. Monthly check-ins are useful, but addressing issues as they arise works best for the team. And while the annual review evaluates performance after the fact, the daily huddle boosts performance in real time, shifting the conversation from judgment to collaboration.

2 Rebuild Task Metrics to Include Experience Metrics

Once the practice moves to continuous coaching, the question becomes: What are we measuring? To elevate CSR performance, we must shift from efficiency metrics to experience metrics. Shifting the focus from speed, volume, and task completion to creating trust, reducing client stress, and improving the client experience requires reimagining some common metrics and creating new ones.

Client satisfaction indicators, including bonding rates, net promoter scores, phone shopper conversion rates, and reactivation rates for lapsed clients, remain valuable. In addition, continuing to coach the CSR team on communication and service efforts, such as recommending products and services, optimizing the visit with treats, paying attention to the need for help with children or pets, and remembering the names of clients and their pets, is necessary for enhancing the experience of the visit, according to Dr. Susan Morphis, also of Willow Grove Animal Clinic.

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“To provide superior care, all employees must know that they are part of the mission and that they are appreciated.”



Of course, determining whether the CSR team is delivering a great experience can be difficult, especially when management isn't sitting in the lobby every minute of the day. Take advantage of modern phone systems that analyze call data and even flag tone, pacing, and engagement patterns, says Julie Smith, practice manager at Bloomsburg Veterinary Hospital in Bloomsburg, Pennsylvania. This allows leadership to identify trends without spending hours manually reviewing recordings.

These tools should support, not replace, real coaching and feedback. Practices can also monitor whether CSRs are guiding clients toward appropriate next steps, properly handling conflicts, and demonstrating behavioral competencies such as empathy, active listening, professionalism, and clarity in their communication.

The effort to balance quantitative and qualitative measures has its rewards. CSRs can and should influence more than just scheduling and phone calls. According to accountant and financial adviser Camala Bailey, CSRs can help with:

- ▶ Wellness plan enrollments
- ▶ Reminder efficacy
- ▶ Compliance
- ▶ Revenue per veterinarian growth
- ▶ Average client transaction growth
- ▶ Appointment fill rate

Performance management discussions should connect these results to client experience and patient care, as well as to business profitability.

3 Redefine Excellence and Train for Competencies

The next step is to clearly articulate the competencies that drive results for exceptional client experiences. In other words, once we measure what matters, we must train for what matters.

Redefining excellence means identifying the specific behaviors, skills, and

professional standards that elevate the front desk from transactional to transformational. Training then becomes intentional — instead of correcting mistakes after they occur, practices proactively build the competencies that produce strong experience metrics in the first place.

The following is a list of competencies and suggested methods of monitoring:

- ▶ **Empathy:** Observation and review of calls
- ▶ **Professionalism:** Observation and review of calls
- ▶ **Active listening:** Observation, review of calls, and client feedback
- ▶ **Communication clarity:** Call audits, client surveys
- ▶ **Conflict de-escalation:** Incident reviews
- ▶ **First contact resolution:** Percent resolved without transferring to someone else
- ▶ **Client satisfaction:** Post-visit surveys
- ▶ **Attention to detail:** Appointment and chart audits
- ▶ **Workflow efficiency:** Call handling and task completion trends
- ▶ **Collaboration with technicians and veterinarians:** Peer feedback
- ▶ **Reliability and attendance:** Attendance record
- ▶ **Adaptability during high volume:** Supervisor observation
- ▶ **Initiative/ownership:** Incident reviews, supervisor observation, training completion
- ▶ **Receptiveness to feedback:** Coaching sessions
- ▶ **Skill development:** Training completion and CE participation
- ▶ **Technology proficiency:** Use of practice management software and communication tools

When managers combine data with clear competencies, they can spot coaching opportunities. For example, if there are repeated appointment errors, it may mean more training is

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needed in confirmation techniques. If client satisfaction scores are low, it could be a chance to improve empathy or conflict resolution skills. This approach changes the conversation from “You’re not meeting expectations” to “Here’s a skill we can develop together.”

Dr. Kerry Wantuck and the team at Healing Paws Veterinary Clinic in Springfield, Missouri, have put these ideas into practice. They use data, focus on client experience quality, and have redesigned how they manage CSR performance. Their approach includes regular check-ins or huddles, real-time feedback, peer mentoring to build a supportive team, micro-training sessions, and role-playing. They also create personalized development plans, since not everyone needs to improve in the same areas. Celebrating wins and recognizing progress helps reinforce positive behavior.

“All team members should be treated as though they are a part of the mission,” said Dr. Wantuck. “The mission is to provide the best experience for every client, every pet, every time. Everyone is a team member, not staff. Everyone has a very important position that is required to make the whole clinic function to its highest capacity. To provide superior care, all employees must know that they are part of the mission and that they are appreciated.”

When data and competencies come together, coaching becomes focused, encouraging, and easy to measure.

Nurture Your CSRs, Nurture Your Business

Rethinking performance reviews for CSRs is not just about people; it's also a smart business move.

“CSRs are the relationship anchor of the practice,” said Smith. “They shape the emotional tone of every client interaction and heavily influence whether a client feels confident, supported, and connected to the hospital.”

Improving performance management is an important first step, but as Dr. Nan Boss of Best Friends Veterinary Center in Grafton, Wisconsin, says, “If you don't treat and pay them like professionals, they're not likely to perform like professionals.” The role deserves genuine respect. When CSRs feel valued and supported, client satisfaction increases, turnover costs decrease, and the overall practice culture strengthens. **TVB**



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