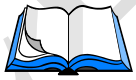
TOPIC TWO: ADMINSTRATIVE SERVICES

- list the essential features of a reception function and reception and/or point of sales area
- put forward an outline of how you will manage the reception/point of sales function
- give examples of keeping records of client contacts, sales and telephone logs
- investigate the telecommunications and electronic business equipment options for clinic needs
- outline workable reception, office systems and telecommunication solutions for your business needs
- establish guidelines for effective communication to determine and meet client needs for specific information
- discuss how to set up systems to file and manage records
- establish some simple time management techniques
- conduct a simulated meeting

Reading:



In your reader:

The customer service guide. Office of Fair Trading, NSW.

Sales methods: Guidelines for business. Office of Fair Trading, NSW

Our Refund Policy (sign), Office of Fair Trading, QLD

These guides, and similar publications, are also available free on the web sites of other State government Fair Trading departments such as **www.fairtrading.qld.gov.au**

The Offices of Fair Trading also publish a number of free guides for a range of specialist services. It pays to visit their offices and check their web sites to ensure that you remain in touch with consumer law and business regulations.

Research assigned:

Visit office, sales and display and business equipment suppliers and collect samples of their catalogues and price lists.

The junk mail that comes in your post box can also be a useful source of information on basic business equipment and consumables.

Assessment:

Please refer to your Assessment Manual for the details of assessment tasks for this topic.

FIRST THINGS FIRST

Whether your first contact with your client is by telephone or in person, your primary objective is to establish what they want and what they need (the two are not necessarily the same). A client will contact you because they **want** something (a perceived need):

- An answer to specific questions about your services, fees and charges
- A service or product that they **want**
- A quick fix to their acute physical, emotional and spiritual problems
- A first point of contact with someone who will listen to them and help them find a solution to their needs
- A series of therapeutic treatments to help a chronic physical, emotional and spiritual problem
- They don't know what they want, they only know they have a need to do something about a presenting condition

So, your first job is to listen to them and establish what they want from you. Your second is to work out what they really **need**.

People are often not articulate, especially if they are ill, upset or confused. In order to get to what they really need (an answer to a perceived or actual want) instead of what they ask for or want, you have to ask them **questions**. There are two main types of questions: open and closed.

Closed questions: These can only get a *Yes/No* or *factual* answer

When did you break your arm?

Have you seen a chiropractor before?

Are you taking any kind of medication?

Open questions: These are designed to get more *information* or *clarification* from the client.

How did you come to break your arm?

In order that I can assist you better, please can you tell me what information you would like about the services of this clinic?

What did your doctor recommend to you about alternative ways to reduce your blood pressure?

Getting *'The Bird'*

He wandered into my library one afternoon and wandered restlessly round the shelves. I thought I would put him out of his misery and asked him if there was anything in particular he was searching for.

"Birds" he replied. *"Anything on birds."*

Good European training prevented me from just rattling off the *Dewey* number and waving a finger.

"What in particular about birds?" I started. A string of information seeking questions followed. Finally, I got the answer I needed. Not just *anything*. How to breed *coloured* canaries.

Make sure that *you* get right down to the pink canaries before you come up with the *goods*.

Complex questions: These are combinations of open and closed questions designed to get *more information* to clarify a point of fact.

Clo*sed question:* When did you break your arm? (client gives date). *Closed question:* Have you experienced any lasting problems from the injury? (Client says yes) Open question: Please can you describe these problems to me?

The clinic telephone is often the first point of contact that you have with the clients. While many of them are calling to book an appointment, you will also get many calls from people who are trying to decide whether to use your services for the first time. They need clear explanations on what you are able to do for them, the costs of the services and any extra services or products you provide.

This does not have to be lengthy, but it should be informative, friendly and related to their needs. People love to be made the centre of attention. Your biggest problem will be to keep a focus on what they are telling you so that you can answer each of their needs with a “We can certainly help you with that by…” point. Keep a notepad handy to scribble down the key points so that you can answer them. You will be surprised at how good a response you get from the client because you have taken the time to *Listen and Take Note.*

When you have established what they want, by asking a series of questions, you can then provide answers which address not only what they want but what they **need**. For example:

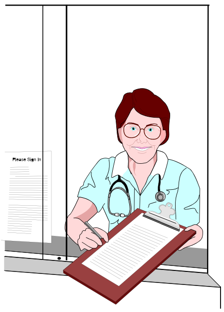
> New Client One: Phones and asks for an appointment. By asking questions you establish that they have never had a massage before, and you have three therapists working with you who all specialise in specific presenting conditions and use very different approaches to the client. The client wants a massage. It is your job to find out *what kind* of massage they need. By talking to them about their wants, you find out that they want nothing more than a nice soothing experience. You book them in with the aromatherapist.
>
> New Client Two: Phones and asks for an appointment. By asking questions you establish that they have never had a treatment using your modality before. By talking to them about their wants, you find out that they have a frozen shoulder. You recommend that they see a remedial therapist who specialises in joint mobilization if this is outside of your own expertise.
>
> New Client Three: Phones in and asks for an appointment for a specific presenting condition. They have had previous appointments with therapists in other clinics and it is your job to establish if they have specific wants and goals. They tell you about the treatment they have received previously and you tell them about your own modality and how this can help in the ongoing management of the condition. Then you book the appointment.
>
> New Client Four: This client is very vague about what they want and you have to ask them a few questions in which you discover that what they really need is more information so that they can make up their mind about what they truly expect from your clinic. You discover that they have no concept on the benefits and relative merits about the various therapies, services and products that might best help them. You ask them to describe their presenting condition to you. You are then able to give them a quick run-down on the benefits of specific modalities that can assist them. You might also offer to send them more information if they do not book an appointment immediately.
>
> New Client Five: This client is only fishing for information so that they can choose whether to book a session with you, or go to your competition. By inviting them to talk about themselves and their wants, you may well have offered them the one thing that they really need: someone to listen to them and take them seriously. If they do not book and appointment, ask if they would like you to send them out information about your clinic and services. This approach wins custom.

With the first three new clients, it is you that has the major information needs: to establish what they want so that you can give them what they need. The last two clients are the ones with the major information needs. They need it to make up their mind on whether what you offer is what they want.

In order to meet their needs better, you need to have pre-prepared a set of information about the following:

- clinic hours
- fees and charges for specific services
- health fund rebates
- the therapists and their specialisations
- the products and services offered in the clinic
- how clients can get to your clinic by public transport and car
- other health services so that you can refer them if necessary

You should also keep on hand



- emergency contact numbers
- telephone and local service directories
- bus and train timetables
- new client health questionnaires
- advertising brochures
- business cards
- instructions for any special equipment
- diet sheets or instructions for following treatment regimes, if applicable

At all times you must be very specific about the legal and therapeutic boundaries of all therapists working in the clinic. This information is vitally important to the client as a consumer, and <u>must</u> be relayed to them immediately they make a request for a service, diagnosis or product that falls outside of your legal, ethical or therapeutic constraints. When in doubt – refer!

Task 8: Please go to page 20 of your Assessment Manual and complete the questions**.**

ASSESSMENT RECORD

Student Name:	
Student Number:	
Postcode:	
e-mail:	
Assessor/Trainer:	
Telephone:	
e-mail:	

Topic	Assessment tasks	Date	Pass
Two: Administrative services	6. Establishing client wants and needs worksheet		
	7. Planning Quality Service Worksheet		
	8. Case study – Two service calls		
	9. Administrative functions assignment		
	10. Mail procedures worksheet		
	11. Managing clinic records		
	12. Client record systems		

Assessor's comments:

Assessor Signature: ______________________________

Student Signature: ______________________________

Sign-off date: ____________________

Task 6: Establishing client wants and needs

Thinking about your own clinic, and the type of information your clients may want and need:

1. What is the difference between a want and a need?

2. Why is it necessary to gather specific information about client wants and needs before booking appointments?

3. Write down three closed questions you might ask your clients:

4. Write down three open questions you might ask your clients:

5. Write down a set of complex questions you might ask a client to gain clarification on a point:

6. Write down a simple script that you might use to explain the benefits and purpose of a specific therapy to a client:

7. List the specific brochures and information sheets you keep at your reception point:

8. What are the legal and therapeutic boundaries which limit your own services?

9. What might you listen for to alert you to the need to refer the client on to other health services?

10. Explain your clinic policies and procedures for making referrals to other health services: