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Practical Customer Service Tips for Technicians

By Billy B. Cheung, B.Sc. Phm

Statement of objectives

Upon completion of this lesson, the pharmacy technician will be able to:

1. Identify opportunities and suggest measures to provide enhanced customer service through typical day-to-day interactions and situations.
2. Identify opportunities and suggest measures to provide enhanced customer service through improvements in dispensary operations and processes.

Pharmacy technicians, in both community and hospital, play an important and integral role as part of the pharmacy team. Every day, pharmacy technicians interact directly and indirectly with customers who require the products and services offered by the pharmacy. Each and every customer interaction contributes to the image of the pharmacy and staff, along with how the products and services are perceived. Providing good customer service usually translates to repeat customers. Poor service can damage the pharmacy's reputation, and can also have a negative impact on the success of the department or business.

It's important to be aware that there are two different types of customers — external and internal. For pharmacy, external customers are typically the people (i.e., patients) who ultimately use your product or service (i.e., medications), while internal customers are your co-workers (i.e., pharmacists, technicians) and others (i.e., physicians, nurses) who depend on you to deliver the product or service. Good external customer service is dependent on good internal customer service. Technicians,

pharmacists, physicians and nurses who work effectively as a team and support each other's needs will have a positive impact on the patient's service experience.

While all types of customer service share common elements (customer acknowledgement, identifying needs, communication styles, etc.), the pharmacy environment presents many unique situations. External 'customers' are, in most cases, also 'patients' who need assistance with their health—they are likely at the pharmacy or in the hospital because they have to be there. They may be experiencing pain, depression, may have just been diagnosed with a chronic disease or just finished waiting several hours in the ER. This is not just typical customer service...this is health care.

From an 'operational' perspective, pharmacies are also different from other environments in that the external customer, in many cases, comes with a request for a specific product/service already pre-determined by a physician. Pharmacies are expected to interpret this request, have the product in stock, efficiently and accurately dispense the product, and provide

information necessary for the product's proper use, all with speed and 100% accuracy.

Customer service is a broad topic and discussing the theoretical aspects of enhanced customer service is beyond the scope of this lesson. The goal of this lesson is to provide pharmacy technicians with a few ideas, considerations and tips on how to be more involved and how to be leaders in enhancing customer service.

CUSTOMER INTERACTION OPPORTUNITIES AND SITUATIONS

Every day, pharmacy technicians have numerous opportunities to offer enhanced customer service beyond what would typically be expected. The following points provide helpful suggestions for enhancing interactions with customers.

Introduce yourself

Customers (patients, nurses, doctors, etc.) perceive technicians as one of the people who help look after their medication needs. Providing the customer with your name and your role will not only personalize your service, it will also establish your professionalism. It's as simple as saying, "Hi, I'm _____, one of the pharmacy technicians. How can I help you today?"

Ask questions

In the community dispensary, a typical customer expects to receive the correct medication, instructions and counselling. In some cases, customers may not be aware that they may need or benefit from a related item. Anticipating and understanding these additional needs represents opportunities for pharmacy technicians to provide enhanced service. For example, a customer with a prescription for an antibiotic cream to treat a skin infection from a cut can be asked whether they need any dressings or bandages. Learn to anticipate some of the related potential needs and carefully ask the appropriate questions in order to enhance their health — making sure that this won't be perceived as just an opportunity to increase sales.

Pharmacist referrals

The pharmacy is a unique retail establishment in that a healthcare professional is always available to provide expert advice and

recommendations. As a pharmacy technician, you are able to facilitate these interactions between customers and pharmacists by identifying patients who would benefit from speaking with a pharmacist. For example, when helping people find a particular nonprescription product that they've requested, ask such questions as:

- "Have you used this medication before?"
- "It's important to ensure there are no drug interactions. Are you taking any prescription or other nonprescription medications?"

In these examples, if the customer has not used the medication before or is currently taking other medications, offer the opportunity to speak with the pharmacist.

Call When Ready

Communication with customers is a critical element of extraordinary service. "Call When Ready" is a term to describe patient followup for many typical pharmacy situations, such as:

- new or refill prescriptions requiring prescriber authorizations or confirmation;
- medications not normally stocked by the pharmacy that need to be ordered;
- prescriptions with a balance owing; and
- back-order items.

When consistently executed, Call When Ready saves the customer from making unnecessary calls and visits to the pharmacy. Pharmacy technicians can develop a system to easily identify Call When Ready situations, using tools such as electronic notes from the dispensary software, coloured paperclips, or sticky paper notes to 'flag' the item or prescription. As an example, the pharmacy may assign blue clips to represent Call When Ready. Staff would ensure a blue clip is attached to any prescription hardcopies that require this patient followup, with the understanding that the clip is not to be removed until the customer is contacted. Busy community or hospital dispensaries may assign this responsibility to a specific technician, who makes the calls each day when the pharmacy is least busy.

Give detailed information

Since pharmacies must operate within legislated requirements, there will be times when you are not able to provide a product or service when requested by the customer. Avoid the perception of poor service by keeping the customer informed. For

Table 1 SOME TYPICAL "CALL WHEN READY" SITUATIONS:

- new or refill prescriptions requiring prescriber authorizations or confirmation;
- medications not normally stocked by the pharmacy that need to be ordered;
- prescriptions with a balance owing; and
- back-order items

example, if you are unable to reach the doctor although the prescription is not ready, calling the customer reassures them that they have not been forgotten.

Always clarify telephone interactions

When interacting with customers on the phone, it is important to clarify what was discussed because it can be hard to hear in a noisy, busy dispensary. Take a moment to repeat back what has been communicated. You will reduce the risk of errors and eliminate the potential for delays on pickups or deliveries. Other telephone tips include:

- smile—it comes through in your voice;
- speak slowly, especially if you know you tend to be a fast talker;
- always introduce yourself to the customer so they know who is assisting them;
- ask for their first and last name;
- ask for a phone number where they can be reached, which may be a cell phone or a specific nursing station extension and not the number you have on record;
- ask and always wait for a response before putting a customer on hold;
- customers should not be left on hold for more than 60 seconds—if that cannot be avoided, offer to call them back and provide an approximate time;
- always use the telephone's 'hold' feature rather than laying down or placing your hand over the phone receiver; and
- if a call is transferred to someone else (e.g., a pharmacist) the same on-hold rules apply and it is your responsibility to check back if needed.

Handling difficult customers

You will inevitably need to deal with a customer who may be more 'challenging.'

This could be a doctor who is upset or demanding, or a patient who is very talkative, indecisive, or rude. You are encouraged to learn more about this topic and customer communication skills. Your local library or bookstore will have general customer service books in the business section. For pharmacy specific readings refer to the reference list at the end of this lesson.

Some very basic points to remember when dealing with a difficult customer:¹

- don't take it personally—the customer is usually upset at the situation, not the person;
- be calm and remain in control of your emotions;
- let the person have their say and vent their feelings—he or she will eventually calm down;
- empathize with the person—demonstrate you are listening to their concerns through positive eye contact, body language or periodic verbal clues (e.g., “I understand,” or “I see”);
- probe to identify and clarify the concern and how it can be resolved;
- write down the concern or complaint — this confirms you are listening; and
- ask your manager to assist if the situation continues to be difficult.

TEAM EFFECTIVENESS TO ENHANCE CUSTOMER SERVICE

Good external customer service is dependent upon good internal customer service. A team that works and communicates effectively can have a significant impact on the image of the pharmacy. Dispensaries can be very busy with many different people working on multiple tasks at the same time. Effective communications among team members is critical to ensure important followup actions are not lost, and that everyone is on the same page, thereby minimizing delays in serving the external customer.

Systems or processes need to be in place to ensure consistent communications during shift changes, particularly for the following action items:

- prescriptions that require a call to the doctor's office;
- prescriptions that are waiting for the doctor to call back;
- prescriptions with a balance owing; and
- special-order items for customers.

The absence or poor application of

Table 2 TELEPHONE TIPS:

- smile—it comes through in your voice;
- speak slowly, especially if you know you tend to be a fast talker;
- always introduce yourself to the customer so they know who is assisting them;
- ask for their first and last name;
- ask for a phone number where they can be reached, which may be a cell phone or a specific nursing station extension and not the number you have on record;
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- if a call is transferred to someone else (e.g., a pharmacist) the same on-hold rules apply and it is your responsibility to check back if needed.

these processes for internal customer service inevitably results in poor external customer service.

PHARMACY OPERATIONS TO ENHANCE CUSTOMER SERVICE

This next section focuses on operational changes in the pharmacy to enhance customer service. Since these suggestions do not require the clinical expertise of a pharmacist, they are clearly opportunities in which pharmacy technicians can take leadership.

Optimize your dispensary inventory

Inventory management is directly linked to customer service. Dispensary inventories that are not optimized will inevitably lead to insufficient or zero product availability. One has to source the medication from another local pharmacy (resulting in increased wait times for the patient) or ask the patient to return later, which is a

Table 3 ACTION ITEMS THAT REQUIRE EFFECTIVE INTERNAL COMMUNICATION

- prescriptions that require a call to the doctor's office;
- prescriptions that are waiting for the doctor to call back;
- prescriptions with a balance owing; and
- special-order items for customers.

huge inconvenience. In the hospital, this translates into additional time and work, as the physician may need to be contacted for alternative therapy options and possibly even poor health outcomes if the medication is required for an emergency.

Dispensary software systems have advanced automatic (or “perpetual”) inventory management systems and when set up properly, can ensure that, in most cases, the product is on the shelf when needed. Pharmacists and technicians should no longer spend valuable time on manual inventory management; rather, they need to optimize the use of available technology and software to manage the inventory.

Prescription refill requests

Community pharmacies regularly receive prescription refill requests from patients who have no more refill authorizations. Pharmacies then need to obtain the doctor's authorization (unless pharmacists have prescribing authority in that province), which can take time. Pharmacy technicians can request additional refills beyond the current request from the physician. This will reduce future delays and save additional work down the road. As well, when a customer is picking up a refill, let them know when there are no further refills. Use vial labels as a printed reminder for patients.

Attention to detail

When dispensing a prescription, pharmacies are dealing with people's health and wellness so attention to detail and accuracy is paramount. Small or minor mistakes may be perceived as bigger errors by the patient. Putting the wrong

doctor's name on the label or missing refills may cause the customer to question what else may be incorrect. Striving for 100% accuracy is critical. Aside from the obvious, such as providing the right medication, some examples of other items that require attention to detail include:

- prescription labels should be horizontal and centered where possible;
- split the quantity when using multiple labels for the same prescription so they match the package quantity;
- ensure the correct spelling of all text; and
- place prescription tape over items that have the potential to fade (such as labels on ointment jars).

Use technology

While discussion of specific technologies to enhance customer service is beyond the scope of this lesson, it must be noted and reinforced that technology can play a significant role. Examples include:

- integrated voice response systems that allow the customer to request refill prescriptions remotely and outside of

regular operating hours;

- on-hold phone systems with music and/or messaging (silence makes the wait time seem much longer);
- setting up an email address and checking it regularly for customer communications; and
- dispensary automation for prescription processing can provide additional speed and accuracy.

Technology, when implemented effectively, allows the dispensary staff to focus on the customer.

Get organized

Strong organizational skills translate into efficiency, which translates into being better able to serve customers. For example, most pharmacies have various patient counselling information materials and tools such as pamphlets and placebo devices (e.g., inhalers). Pharmacy technicians can ensure these are readily accessible, without needing to "hunt it down." Similarly, nonprescription items such as pill splitters, measuring devices and compliance aids,

should be within quick reach of the patient counselling area.

The role of the pharmacy technician

In general, pharmacy technicians have the opportunity to become involved in three major aspects of customer service: direct interactions with the external customer; direct interactions with the internal customer; and enhanced pharmacy operations. As an empowered pharmacy technician and important member of the pharmacy team, you are encouraged to implement, support and advocate for all opportunities to enhance customer service.

REFERENCES

1. Rantucci, Melanie J., *Pharmacists Talking With Patients: A Guide to Patient Counselling*, 2nd Edition, 2006, Lippincott, Williams & Wilkins.
2. Robert S. Beardsley, Carol L. Kimberlin, William N. Tindall, *Communication Skills in Pharmacy Practice, A Practical Guide for Students & Practitioners*, 5th Edition, 2008, Lippincott, Williams & Wilkins.

► QUESTIONS

1. Communication is an important element of providing good customer service. Situations where Call When Ready can take place include:

- a. Items which have been on backorder and are now in stock
- b. A refill request which required a doctor's authorization prior to dispensing
- c. A prescription dispensed where the patient has indicated they would be picking up in a couple of days
- d. All of the above
- e. A and B only

2. A patient contacts you during the day to refill their prescription already on file. What is the key information you should collect during the phone conversation?

- a. Full name, what medication the refill is for and a phone number where they can be contacted.
- b. Full name, prescription number, what medication the refill is for and home phone number.
- c. Full name, prescription number and home phone number.
- d. Full name, prescription number, what medication the refill is for and a phone number where they can be contacted.

Please select the best answer for each question or answer online at www.pharmacygateway.ca for instant results.

3. Customer service is both external and internal. Select the best answer related to customer service for pharmacy technicians in a hospital:

- a. Internal customers include patients in the hospital
- b. Internal customers include nurses and doctors
- c. Internal customers include nurses, doctors, and pharmacists
- d. Internal customers include nurses, doctors, pharmacists and other pharmacy technicians
- e. A and B only

4. A regular patient comes to the pharmacy to pick up their insulin prescriptions. Select the interaction which best demonstrates identifying needs and good customer service as discussed in the lesson:

- a. Promptly provide the prescription to the patient and ask "Is there anything else we can do for you today?"
- b. Promptly provide the prescription and ask "Did you need pen needles for your insulin or anything else today?"
- c. Promptly provide the prescription and ask "Did you need test strips and anything else today?"
- d. Promptly provide the prescription and review each item to ensure the requested insulin is enclosed.

5. In which situation should a pharmacy technician always refer the patient to the pharmacist?

- a. A customer is requesting assistance in finding Extra Strength Tylenol caplets.
- b. A customer is requesting assistance in finding something for their upset stomach. They indicate that a friend told her to pick up some Zantac.
- c. A regular prescription customer is requesting assistance in finding the herbal supplement Saw Palmetto.
- d. All of the above
- e. B and C only.

6. A nurse in the hospital contacts the pharmacy department upset that a medication order has not been dispensed. Select the most appropriate method for dealing with the situation:

- a. Hang up on the ranting nurse.
- b. Let the nurse complete her rant, then write it down and indicate that you'll follow up.
- c. Interrupt the rant and let the nurse know that the pharmacy never received the medication order.
- d. Let the nurse rant, clarify the situation when she's finished, write it down, and indicate that you will follow up and contact her back.

7. Patient counselling information materials and tools should only be kept inside the private counselling area of the pharmacy.

- a. True
- b. False

8. When introducing yourself to the customer, which of the following should you do:

- a. Provide your name
- b. Tell them your role / position
- c. Ask them how you can help them
- d. All of the above
- e. A and C only

9. Customer service in pharmacy is unique because:

- a. It also deals with health
- b. Pharmacy customers are more demanding
- c. Pharmacies have long hours
- d. Customers always want their prescriptions fast

10. Some examples where there needs to be effective communication protocols among the pharmacy team include:

- a. Prescription refills which require contacting the physician's office
- b. Prescription refills waiting for a doctor call back
- c. Special-order items for customers
- d. All of the above
- e. A and B only

11. Attention to detail in the dispensing of prescriptions is an important customer service aspect because, as a patient, lack of attention to the small points may be perceived as lack of attention to the bigger points such as dispensing the correct medication.

- a. True
- b. False

12. A physician calls in a prescription for a patient. Upon reviewing the dispensary system, you realize that the patient is not in the system and you do not have their phone number. To provide the best customer service, what should you do?

- a. Flag the written prescription with a sticky note and place it in an easily retrievable location for when the patient comes to the pharmacy.
- b. In addition to the above, also prepare the actual medication so that only the label needs to be prepared to minimize the wait time when the patient arrives.
- c. Contact the physician's office to obtain the patient profile necessary to dispense the prescription.
- d. Contact the physician's office for a phone number to the patient, then contact the patient to complete the patient profile necessary to dispense the prescription. Inform the patient that it will be ready by a specific time.

13. A dispensary inventory which is not optimized can lead to poor customer service because:

- a. It can lead to increased wait times for the patient
- b. The patient may need to make an additional trip to the pharmacy
- c. Additional work by the staff resulting in less time available to directly assist customers
- d. All of the above
- e. A and B only

14. Pharmacy technicians should not take negative comments or interactions with customers personally unless they specifically mention your name.

- a. True
- b. False

15. What is the role of the pharmacy technician in providing customer service?

- a. Ensuring the needs of other team members are met when you have the ability to do so
- b. Look for opportunities to go above and beyond the service expectations of the patient
- c. Identify operational processes which can be improved, and where needed, work with other team members to find ways to implement them
- d. All of the above

For information about CE marking, please contact Mayra Ramos at (416) 764-3879 or fax (416) 764-3937 or email mayra.ramos@rci.rogers.com. All other inquiries about Tech Talk CE should be directed to Tanya Stuart at (416) 764-3944 or tanya.stuart@pharmacygroup.rogers.com.