



The ABCs of Marketing and Managing Your Preventive Care Plans

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Meet your consultant



Wendy S. Myers owns Communication Solutions for Veterinarians in Denver, Colorado. Her consulting firm helps teams improve client service, communication skills and compliance. Communication Solutions for Veterinarians has provided phone-skills training to nearly 5,000 veterinary teams in the United States and Canada. Wendy offers monthly CE credit webinars. She is the author of five books and five videos. Her latest book is *101 Communication Skills for Veterinary Teams* and DVD is "Become a Client Communication Star." Wendy is a member of the American Animal Hospital Association and has been an instructor for AAHA's Veterinary Management School. She has cats named Alex and Caymus. Find Communication Solutions for Veterinarians at Csvets.com, [Facebook.com/csvets](https://www.facebook.com/csvets), [YouTube.com/csvets](https://www.youtube.com/csvets) and Twitter [@wendysmyers](https://twitter.com/wendysmyers).

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Learning objectives

A key ingredient to a successful preventive care plan (wellness plan) is a well thought out marketing strategy and management system. In this session, discover what it takes to effectively market your preventive care plans by driving pet parent awareness through digital marketing, social media and in-practice tools. Find out how an inspired team creates a flawless client experience through training and sample talk tracks. In addition, understand the options available to help manage your preventive care plans and the importance of an integrated management program.

Train your team to educate and enroll clients

How long will it take to implement plans?

The implementation process typically takes 30 to 45 days. IDEXX Petly Plans™ assigns a customer success specialist to guide your hospital team through setup, marketing, configuration, training and launch. Your specialist will share best practices and tips for success.

"IDEXX Petly™ Plans supported the upstart and implementation to begin our plans," says Stacey Wieder, CVPM, PHR, of Royal Pets Veterinary Center, which has veterinary centers, pet hotels and retail stores in Palm Harbor, Tampa and St. Petersburg, Florida. "Modules to train our staff were helpful because they need to understand the value of plans. The whole team must deliver a consistent message at any touch point with clients."

Once doctors design preventive care plans, schedule a staff meeting. Include everyone, from doctors to boarding team members. Every employee has daily client conversations and needs to be able to confidently explain your hospital's preventive care plans. During your staff meeting, discuss common questions that clients may have. A well-informed team will set you up for long-term success with preventive care plans.



During the staff meeting, share details about:

- Why you chose to offer preventive care plans (Share the vision.)
- Services included in plans (and exclusions)
- Plan prices, enrollment fees and any co-pays (Choose prices that will be easy for staff to remember such as \$29 per month for silver plan, \$39 for gold and \$49 for platinum.)
- Monthly payment schedule and methods (IDEXX Petly Plans™ accept bank drafts through eCheck (U.S. only), major credit cards and debit cards. The software allows you to store multiple payment methods for an individual client. Best practice is to have a bank account as the primary payment method for the monthly payment and store a major credit card as the secondary method. Monthly payments are processed on the 20th of every month, while new plan enrollments are processed daily.)
- Any discounts or perks for plan holders (i.e. unlimited preventive exams or free nail trims)
- What role each employee will play in promoting plans
- Questions to anticipate from clients
- Marketing materials
- Training on how to use plan software, including new enrollments, using and tracking services
- Goals for how many plans to sell
- Discuss any individual or staff incentives or bonuses (IDEXX Petly Plans™ can track who sold and renewed plans and also split credits.)
- Who will be the staff champion(s) for the program and responsibilities

In a separate doctors' meeting, discuss how veterinarians who receive production pay will be compensated. When National Veterinary Associates (NVA) rolled out plans in 129 of its corporate practices with more than 40,000 active patients, veterinarians became the best advocates. Patients received increased care and visited more often. As a result, production pay went up. Clients also spent an average of \$287 more per patient per year on out-of-plan services. At NVA, production pay increased 57 percent for clients with plans.¹

Keep momentum going

Assign a preventive care coach, typically a hospital manager or technician, or establish a committee made up of one veterinarian, one technician, one receptionist and one hospital manager. This employee or committee will oversee your preventive care plans, track results and update staff.

Set a goal for the number of preventive care plans to sell each month. Let's say your hospital sees 300 patients per month and wants 20% to enroll in preventive care plans. Your goal would be to sell 60 plans each month. If your hospital is open Monday to Saturday, you would need to sell 2 ½ plans per day (24 business days per month divided by 60). Having a daily goal makes the task achievable.

Post results on an employee bulletin board and share updates during staff meetings. Keep the team informed so you can celebrate exceeding the goal or encourage them if more sales need to be made.

A Brakke Consulting study of 133 hospitals with preventive care plans found that all offered incentives to employees to sell plans.¹ NVA contributes \$10 into a fund shared among employees while private hospitals extend a \$5 incentive or pay a bonus when the sales goal is met. At Doral Centre Animal Hospital in Doral, Florida, each employee has a quota to qualify for the bonus (<http://doralvet.com/wellness-plans.html>). The team signed up 678 patients in the first year.



Create a marketing and communication plan

Use a combination of internal and external marketing efforts, including:

- In-clinic brochures and posters
- Telephone and exam room scripts for teams
- Banners or marquee sign
- Practice website
- Email campaigns (IDEXX Petly Plans™ offers templates.)
- Social media
- Message on hold
- Direct mail
- Slideshow to play on exam computers and/or digital photo frames in lobby

IDEXX Petly Plans™ offers pre-designed marketing materials, including brochures, client books, posters, web banners and social media posts. Materials can be customized with your hospital's logo, specific plan services and prices.

Entice price shoppers to become clients with preventive care plans

To sustain a healthy, growing practice, a veterinary hospital needs 25 new clients per full-time-equivalent veterinarian each month.² A two-doctor small animal practice should target 50 new clients per month or 600 annually. In a two-doctor practice with two receptionists, each receptionist would be accountable for recruiting 25 new clients each month. If your receptionist works full-time (five days a week), that's just one new client per day.

Your goal is to convert leads into booked appointments. When a price shopper calls your veterinary clinic, she already wants to do business with your hospital. According to *Harvard Business Review*, prospects have made 60% of the purchasing decision to do business with you before they contact you.³

A Communication Solutions for Veterinarians' phone analysis of 3,000 calls to U.S. and Canadian veterinary clinics found 53% of receptionists failed to ask price shoppers to book appointments.⁴ Receptionists' ability to win callers over during initial phone calls can dramatically impact your business. At Communication Solutions for Veterinarians, we've provided phone-skills training to more than 5,000 teams in the United States and Canada (www.csvets.com/training/phone-skills.html).

When talking with price shoppers, share two qualities of your hospital. This helps callers distinguish your clinic from other practices that she has called. Relate the two features to the service she is inquiring about. If the price shopper is asking about a new patient exam, explain that you offer convenient hours and preventive care plans with affordable monthly payments.

"We offer convenient hours on evenings and weekends. Our hospital also has preventive care plans that let you make monthly payments. How old is your pet so I can tell you about the plan that would fit your needs?"

When closing the call, ALWAYS ask for the appointment. Don't just provide information and hang up. Use leading phrases such as, "When would you like to schedule your pet's exam?" instead of "Do you want to book an appointment?" The word "when" is a yes answer compared to "do you want," which is a yes-or-no choice.

Promote plans during phone greetings. Your hospital's phone rings hundreds of times each day. Educate callers when answering calls from existing clients and price shoppers who are about to become



new clients. Have receptionists say, *“Thank you for calling <Your Veterinary Hospital>, where we offer preventive care plans with monthly payments. This is <your name>. How may I help you?”*

Introduce plans when clients call to make appointments

A receptionist might say, *“Thank you for calling to schedule Duke’s appointment. Our hospital offers preventive care plans that let you make monthly payments. For your adult dog, a plan includes <describe services> for \$___ per month plus a \$___ one-time enrollment fee. You can get details on our website at www.yourwebsite.com. We can answer your questions during Duke’s exam and enroll him the same day. Let’s make his appointment now.”*

Mention plans during confirmation calls

“This is <your name> calling from <Your Veterinary Hospital> to confirm your dog’s appointment with Dr. <Name> on Monday beginning at 10 a.m. Please remember to bring a teaspoon-sized stool sample that’s fresh within ___ hours, as well as medications and supplements you’re giving to your dog. Our hospital offers preventive care plans that let you make monthly payments. You can get information on our website at www.yourwebsite.com, or we will explain plans during Duke’s exam. If you have questions, please call us at 555-555-5555.”

Post materials in high-traffic areas

Display brochures on the reception counter and give them to clients upon check-in. Hang posters in the lobby and exam rooms.

Advertising theory shows consumers must hear a message three times before making purchasing decisions. Here is an example of the rule of three in action for preventive care plans:

1. **Receptionists:** Educates clients about plans during scheduling and appointment confirmation calls and hands brochure at check-in.
2. **Technicians:** Explains plans and answers clients’ questions during exams.
3. **Veterinarians:** Echoes benefits of preventive care plans.

Explain plans during exams

The exam room is your classroom, so display posters, flyers and brochures about preventive care plans. The technician would say, *“For your preventive checkup, we will do a nose-to-tail exam, vaccines, intestinal parasite screen, heartworm/tick screen, preventive blood work and urinalysis, and refill 12 months of heartworm and flea/tick preventatives. To make veterinary care affordable, we offer preventive care plans that let you make monthly payments. For your adult dog, a plan includes <describe services>. This plan costs \$___ per month and has a one-time \$___ enrollment fee per pet. You would pay the enrollment fee and first payment today for a total of \$___ and the remaining payments would be \$___ per month, automatically billed to your credit card, checking or savings account. Have I given you enough information to make a decision on your pet’s plan? (Closing: Call to action to enroll now.) Are you ready to enroll your pet now? I can walk you through the enrollment right here in the exam room.”*

If the client says yes: *“You’ve made a great decision to provide preventive care for <pet’s name>. The enrollment process just takes a few minutes, so let’s get started.”*

The first no is not the final no. Clients may need repetition of the message before getting to yes. If the client is unsure: *“If you need more time to decide, here’s a brochure that describes our preventive*



care plans. You also can view plans on our website at www.yourwebsite.com. You can call us or sign up at the time of your next visit.”

Explain plans on your message on hold

On average, 70 percent of business calls are placed on hold, so your clients will inevitably experience hold-time.⁶ Information about your practice’s services and products can turn holding time into learning time. Instead of music, 88 percent of callers prefer messages to other on-hold options and 20 percent made a purchase from information they learned while on hold.⁷ Create custom on-hold messages about your preventive care plans, services, doctors and products (www.intouchvet.com).

Send email blasts

Target all active clients with patient visits during the last 18 months. Include a link to your website where clients can view the plan that meets their needs. Also send email blasts to clients with pets that have not had medical visits within one to three years. If financial limits prohibited care, preventive care plans could be the solution that brings them back.

Put footers on reminders

When sending weekly preventive care reminders, put footers on postal and email reminders such as: “Our hospital offers preventive care plans that let you make monthly payments. Get details at www.yourwebsite.com.”



Capture drive-by traffic

Dalton Animal Care in Dalton, Georgia, has a message on its marquee sign so passersby know about its preventive care plans. If you don’t have a marquee sign, order yard signs from FedEx Office, Fast Signs or a local sign shop. Be sure to post in accordance with local sign ordinances.

Post banners on your website

Clients can click through to see your preventive care plans and costs.

Engage social media

Current alpha dog, Facebook has 1.6 billion monthly active users in 2015.⁸ The average American spends 40 minutes per day on Facebook.⁹ The average Facebook user has 350 friends.¹⁰ “Every puppy that signs up for a wellness plan gets a photo, which we post on Facebook and tag the owner,” says Dr. Leonardo Baez of Midtown Vets in Oklahoma City, Oklahoma (www.facebook.com/midtownvets). “Their friends see the photos, and we get referrals. Social media has been a tremendous help to promote wellness plans.”

When launching preventive care plans, create social media content in advance. Post weekly on Facebook and Twitter about preventive care plans. Make a YouTube video to demonstrate the value of preventive care exams. To explain what veterinarians look for during pets’ exams, Bakerstown Animal Hospital in Bakerstown, Pennsylvania, posted videos of dog and cat exams on YouTube (www.youtube.com/watch?v=YZvHdaJ45s&feature=mfu_in_order&list=UL).



Here's an example of a social media content plan:

Month	Facebook	YouTube	Twitter
April Medical theme: Preventive care plans	Week 1: Introduce preventive care plans	Monthly: Video of a doctor performing and explaining a preventive care exam	Week 1: <Your Veterinary Hospital> now offers puppy, kitten, adult and senior preventive care plans that let you pay monthly. Visit www.yourwebsite.com .
	Week 2: Feature the first patient to enroll in a preventive care plan		Week 2: Congrats to Max, our first enrollment in preventive care plans. Give your pet year-round care in affordable monthly payments. www.yourwebsite.com
	Week 3: Client testimonial about why they love preventive care plans at your veterinary hospital		Week 3: Did you know owning a dog costs an average of \$526 yearly? We make veterinary care affordable with preventive care plans. www.yourwebsite.com (Source: www.petfinder.com/after-pet-adoption/annual-dog-care-costs.html)
	Week 4: Create a wall album with photos of pets on preventive care plans		Week 4: Did you know owning a cat costs an average of \$295 yearly? We make veterinary care affordable with preventive care plans. www.yourwebsite.com (Source: www.petfinder.com)

Create a Facebook wall album titled “Celebrating our preventive care plan pets.” Each time a client purchases a preventive care plan, take the pet’s photo and get the client’s permission to post it on your Facebook page.

Here’s a sample permission statement: “I grant <Your Veterinary Hospital> permission to post my pet’s picture, story and medical information on social media.” Have the client sign and date the document. Use the term “social media” rather than stating which sites so you have flexibility about where to post.

Send e-newsletters

Feature preventive care tips, include information on your clinic’s preventive care plans, and share profiles or testimonials from plan users.

Remind clients about preventive care plans at checkout

Repetition of the message drives client education. At checkout, give clients a brochure and let them know they can enroll before or during their next preventive care visit.

Forward book the next preventive checkup

According to the 2015 AAHA State of the Industry report, 6 out of 10 pet owners would forward book their pets’ preventive care exams.¹¹



Think about your last visit to the dentist. Your dental hygienist scheduled your next six-month cleaning before you left the office. This scheduling technique serves dual purposes as preventive care as well as a business strategy. The preventive care strategy ensures timely visits for professional care as well as to diagnose any oral problems early. The hygienist also sends you home with toothpaste, floss and a toothbrush, which reinforces oral preventive care at home.

As a business strategy, scheduling the next visit today will keep the hygiene schedule full and productive. When the hygiene schedule is not full, a domino affect will occur. Patient care will suffer without timely hygiene preventive care appointments, and the dentist will see openings in the treatment schedule in the future. At least 80% of dental problems—root canals, crowns and restorations—come from hygiene appointments. Dentists refer to their system as “recare appointments.” When patients leave the dental hygiene appointment without a future appointment scheduled, this will dramatically decrease practice profitability by at least half.¹²

Dentists shifted their patients’ mindsets from dentist = toothache to preventive care. Savvy veterinarians should follow dentists’ lead.

Tell clients, *“Just as your dentist has you schedule your next hygiene appointment at checkout, we do the same so we can proactively manage your pet’s health. Dr. <Name> can see you on Wednesday, September 9 at 10 a.m. or Friday, September 11 at 3 p.m. for your pet’s next preventive care exam. Which choice fits your schedule?”*

When booking exams six months or more ahead, call clients one to two weeks in advance to confirm in case appointments need to be rescheduled. Use a unique color code or description in your practice-management software so you can identify appointments that were booked far in advance.

Schedule first, pay last. Only 4% of practices always schedule medical progress exams at checkout, while 35% do so often and 49% sometimes do.¹³ If follow-up care is needed, schedule it before collecting payment for today’s services. Then the appointment reminder will print on today’s receipt and you’ll avoid the client’s hesitation to schedule if she hears today’s price first.

Say, *“Dr. <Name> needs to see your dog again in two weeks for a medical progress exam for his ear infection. Let’s schedule his exam first, and then I’ll get you checked out for today’s services. Two weeks from today would be <date>. Does this same time, 10 a.m., work for you?”*

Direct the client to a specific date and time, increasing the likelihood she’ll schedule. If the client is here at 10 a.m. on a Thursday, she can probably visit again at a similar time and day of the week. Book the appointment with the same doctor, ensuring continuity of care and efficient use of exam time.

Use the term “medical progress exam” instead of “recheck.” From a client’s perspective, “recheck” sounds free and optional. Upgrade your terminology to “medical progress exam” to show value for professional services. When your team makes a habit of “schedule first, pay last,” more patients will get the follow-up care they need. If the client doesn’t schedule the next visit at checkout, enter a callback in your practice-management software. Call the client one week before services are due.



Options to manage preventive care plans

How Petly Plans™ software integration works

This online management system helps automate, manage and monitor preventive care plans and clients' monthly payments. Customizable software links to your practice-management system to simplify plan administration while improving staff efficiency.

- Integrates with IDEXX Cornerstone® Practice Management Software, AVImark®, ImproMed® Infinity, IntraVet®, IDEXX DVMAX® and ClieTrax
- Allows for plan enrollment in six easy steps
- Eliminates the need for data entry or duplication
- Automatic plan renewal so clients are continually engaged, including options for monthly installments or lump-sum annual payments
- Auto-drafts payments and deposits them into your practice's bank account, eliminating third-party processing and delays
- Provides ability to customize individual plans with optional add-on services at time of enrollment
- Automatically marks services as used when invoiced, making it easy to track used and remaining services
- Generates a client healthcare agreement each time a plan is created
- Allows plans to be changed after they have been created
- Calculates remaining balances automatically for any plan that is cancelled early
- Allows for a variety of payment methods to process payments, including credit cards, debit cards, checking and savings accounts
- Includes dashboard with a goal-setting function for the practice and each staff member
- Monitors progress with an at-a-glance summary of Petly Plans sales
- Generates reports for payments and transactions as well as historical data

Auto-renewal ensures client retention

Petly Plans™ default to auto-renew plans at the end of each 12-month term. Plans can automatically renew into a different plan type if the practice chooses. For example, a kitten plan can be set up to renew after one year to a feline silver plan. The auto renewal feature can be deactivated if the client decides not to renew the plan for the following term.

What are the top three goals that you will implement from this training?

1. _____
2. _____
3. _____

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Helpful resources	Link
AAHA-AVMA Preventive Healthcare Guidelines	www.aaha.org/professional/resources/preventive_healthcare.aspx
IDEXX Petly™ Plans	http://petlyplans.com/
Partners for Healthy Pets	www.partnersforhealthypets.org/preventive_pet_healthcare.aspx