

# IDEXX Petly Plans

## Scripts for Enrolling Adult Dogs and Cats

This script is a recommendation and should be customized to reflect your practices offerings.

Use this script to help navigate conversations with adult pet owners about your practice's preventive care/wellness program.

**Who?** Reception staff

**When?** A pet owner calls in to schedule annual checkup and/or vaccines



"Let's get *[pet's name]* scheduled for *[requested services]*. During this visit it would be the ideal time to perform annual lab blood work to ensure all your pet's results are normal. Annual screenings are a great way to detect changes early before they become serious. Our practice offers preventive care plans, which bundle essential services like annual exams, vaccines, and lab blood work testing. Not only do these plans allow you to provide your pet with the best possible care, they also spread the cost over 12 manageable monthly payments. Plus, you get access to other membership perks that only plan members are eligible for! Would you like to hear more when you come in for *[visit type]*?"

*If they say YES!*



"Great! I will let the team know. We look forward to seeing you and *[pet's name]* on *[date and time of next appointment]*!"

*If they say NO!*



"Okay, we look forward to seeing you and *[pet's name]* on *[date and time of next appointment]*. And please let us know if you would like to revisit our preventive care plans in the future. You can enroll at any time."



Make a note in the appointment: "Petly Plans interested" or "Not interested in Petly Plans" so the rest of your team knows that the conversation has taken place.

**Who?** Reception staff

**When?** A pet owner checks in for their wellness appointment



"I see *[pet's name]* is here for *[his/her]* *[visit type]*. Each year, *[pet's name]* is going to need services like exams, vaccines, and lab testing to keep them healthy. As a way to provide the best possible care for *[pet's name]*, and help you manage the cost of these services, we offer something called preventive care plans. These plans allow us to bundle the essential services together and then spread the cost over 12 manageable monthly payments. Take a look through this brochure and ask *[tech or doctor name]* any questions you might have during your appointment."

**Who?** Medical team

**When?** During the appointment/in the exam room



“*[Pet’s name]* is going to need *[services for today]*, many of these services are included in our preventive care plans.

Based on *[pet’s name]*’s needs, I am recommending the *[plan choice]*, because it includes *[key items for that pet]*. This plan would cost you *[monthly fee]* per month. Without this plan, today’s visit will cost *[show estimate of today’s services]*.

To enroll today, the cost would be *[membership fee + first month payment amount]*. This covers the one-time membership fee and the first month’s payment. Then you would only need to pay *[monthly fee]* each month for the rest of the year. There are also other membership perks that only plan members are eligible for! Would you like to become a plan member today?”

*If they say YES!*



“Let’s sign *[pet’s name]* up for a plan today!”

*If they say NO!*



“You can sign up anytime. But it’s important to remember that the program only covers future services and can’t cover past visits.”

**Who?** Reception staff

**When?** A pet owner checks out after their appointment but hasn’t decided if they would like to enroll.



“Today’s visit comes to *[total amount due]*. Many of these services could be covered by your preventive care plan and could lower your balance due today. If you choose to enroll now, today’s balance due would be *[insert membership fee + insert first month payment amount]*. This would cover a one-time membership fee and your first month’s payment. From there, it would be a manageable monthly payment of *[monthly fee]*. Would you like to enroll?”

*If they say YES!*



“Great! Let’s sign *[pet’s name]* up on a plan today then!”

*If they say NO!*



“Okay, you can sign up anytime. But it’s important to remember that the program only covers future services and can’t cover past visits.”