

IDEXX Petly Plans

Scripts for Enrolling Puppies and Kittens

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

Use this script to help navigate conversations with new puppy and kitten owners about Petly Plans and your practice's preventive care/wellness program.

Who? Reception staff

When? A new puppy or kitten owner calls in for the first time



“Congratulations on your new *[puppy/kitten]*! As I am sure you are learning, a new pet requires a lot of attention and care, especially during this time in *[his/her]* life. Our team is here to ensure your new furry family member gets the best possible care. Something that may interest you is a way that you can easily budget for your pet’s preventive care needs. Preventive care services are essential to help prevent disease and give *[him/her]* the chance at a longer and better life. Our practice offers *[puppy/kitten]* preventive care plans, which bundle preventive care essentials like exams, vaccines, and lab testing and spreads the cost over 12 convenient monthly payments. We even have a plan that includes your pet’s *[spay or neuter]*! Plus, you will 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 new puppy or kitten owner checks in for their appointment



“I see *[pet’s name]* is here for *[his/her]* *[visit type]*. Welcome! Over the next year, *[pet’s name]* is going to need many essential services like: exams, vaccines, lab testing and even spay or neuter surgery. To provide the best possible care and help you budget, we offer preventive care plans that bundle these services together and then spread the cost over 12 manageable monthly payments. 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 and this year’s services]*. Many of these services are actually included in our preventive care plans!

Based on *[pet’s name]*’s needs, I recommend the *[plan choice]* because it includes *[key items for that pet]*. This plan would only cost you *[puppy/kitten monthly fee]* per month. Without this plan, today’s visit alone will cost *[show estimate of services today and for the remainder of the year]*.

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 just pay *[puppy/kitten monthly fee]* each month for the rest of the year. There are also other membership perks that only plan members are eligible for! It’s a great way to ensure *[pet’s name]* gets all of the essential medical care *[he/she]* needs, including: vaccines, exams, and basic diagnostics. 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!



“We will be seeing you a few times this year, so please let us know if decide to enroll *[him/her]* during a future visit. 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 new puppy or kitten owner checks out after their appointment but hasn’t decided if they would like to enroll.



“Today’s visit comes to *[total amount due]* and it looks like *[pet’s name]* will also need a *[additional services i.e. spay/neuter]* in *[timeframe]* which will cost *[price]*. Many of these services are actually included in our preventive care plans! If you enroll now, today’s balance due would be *[insert membership fee + insert first month payment amount]*, which covers the one-time membership fee and your first month’s payment. From there, it would be a manageable monthly payment of *[puppy/kitten 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.”