



PREVENTIVE HEALTHCARE PLANS:

An Effective Tool for Improving the Health of America's Pets



Implementation
Manual



www.partnersforhealthypets.org

Preventive Healthcare Plans is part of the Practice Resources Toolbox provided by the Partners for Healthy Pets, which offers a comprehensive collection of resources and tools designed to enhance the overall vitality of pets and veterinary practices.

This *Implementation Manual* provides a comprehensive “how to” manual with everything needed to establish a preventive healthcare plan for your practice. Companion pieces to this *Implementation Manual* include the *Overview*, *Team Training Manual*, *Team Training Presentation*, and worksheets you can use in your practice. These resources, as well as the entire Practice Resources Toolbox, are available at partnersforhealthypets.org.

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PREVENTIVE HEALTHCARE PLAN IMPLEMENTATION MANUAL

Brought to you by the Partners for Healthy Pets

FOREWORD

One of the most potentially game-changing opportunities in small animal medicine is the addition of annual preventive healthcare plans to a practice's service options. These types of plans allow pet owners to provide premium care for their pets in an attractive "bundled" format. Also, because many practices are choosing to provide the option of direct monthly billing, these plans are more apt to fit into a pet owner's budget. Research has shown that pet owners want to provide the best care for their pets, but a lack of understanding about proper well care, combined with the challenge of fitting a large one-time invoice into their budget, has deterred many from seeking preventive care for their four-legged friends.*

This manual, and the accompanying tools on our website, are meant to serve as go-to resources, both for determining whether preventive healthcare plans are a good choice for your practice, and if so, for understanding the process of implementation and the decisions that will need to be made along the way.

Have fun, enjoy the process, and most importantly involve your team—you'll be amazed at what they can accomplish!

CHAPTER 1: OVERVIEW

So just what are preventive healthcare plans? They are quite simply an annual package of veterinary services that are specifically related to wellness and preventive healthcare protocols. They are not meant for treating sick or injured pets. Practices typically discount services to some extent, and allow pet owners to pay in monthly installments. The services included in the plans must be redeemed on an annual schedule and do not carry over into the following year.

(For more detailed information, please refer to the *Overview* in the Practice Resources Toolbox on www.partnersforhealthypets.org.)

Because several recent studies have shown that the cost of veterinary care has become a significant barrier for pet owners, the concept of both bundling services and being able to pay for these services in monthly installments is a way to make it easy and affordable for pet owners to provide the highest level of care for their pets. In addition, many practices add benefits to their plans that extend beyond preventive care, such as complimentary office calls and discounts on services and products not included in the plan (it *is* suggested, however, that prophylactic deworming medication be included

in plans). This encourages pet owners to seek veterinary care whenever they have concerns about their pets' health, rather than delay care and/or turn to sources such as the internet for advice.

Although preventive healthcare plans are a paradigm shift for many practices, they provide the perfect vehicle for improving communication with clients. After all, the opportunity to educate face to face is available only when clients bring their pets to the practice. The multiple benefits and levels of value associated with preventive healthcare plans are summed up in the following diagram:



CHAPTER 2: DESIGN

Standard Plan Design Options and Pricing

Most practices choose to offer a minimum of six plans and a maximum of ten, evenly divided between cats and dogs. The purpose of multiple plans is to match procedures to the age of the pet, and to give clients several options for the level of care they wish to provide for their pets. For example, someone with a 5-year-old cat may wish to purchase a mid-level plan with basic diagnostics and dentistry services, while someone with a 12-year-old cat may choose a higher level plan that includes more extensive diagnostics.

SAMPLE PLANS

The following is a sample of some of the most common plan designs and the services they may include—this is meant simply as a basic guideline, and plan services can be added or subtracted based on your practice’s protocols.

PLAN PRICING

While discounting the services in your preventive healthcare plans is not required, a majority of practices are choosing to offer discounts in the range of 10 - 50% off the retail price of these services. Discounts are feasible because of the greater number of services that many pet owners would purchase a la carte, the increased visits and

CANINE

PLAN	SERVICES
Puppy Basic	<ul style="list-style-type: none"> • One or more comprehensive exams • All core vaccines • Non-core vaccines as recommended • Intestinal parasite check (two) • Preventive deworming (two) • Ear swab and microscopic exam • Microchip
Puppy Premium	All of the above plus: <ul style="list-style-type: none"> • Pre-anesthetic panel • Spay/neuter
Canine Adult Maintenance	<ul style="list-style-type: none"> • One or more comprehensive exams • Core vaccines • Non-core vaccines as recommended • Intestinal parasite check • Preventive deworming • Heartworm test (canine) • Ear swab and microscopic exam • Chemistry panel • CBC • Urinalysis and sediment
Canine Advanced Care/Adult Care Plus	Everything included in the Adult Maintenance Plan plus: <ul style="list-style-type: none"> • T4 • Routine dentistry
Canine Premium Care/Senior Care	Everything included in the Advanced Care Plan plus: <ul style="list-style-type: none"> • Two comprehensive exams • Chest radiographs • ECG • Blood pressure checks • Tonopen/Glaucoma screening

FELINE

PLAN	SERVICES
Kitten Basic	<ul style="list-style-type: none"> • One or more comprehensive exams • All core vaccines • Non-core vaccines as recommended • Intestinal parasite check (two) • Preventive deworming (two) • Ear swab and microscopic exam • Leukemia/FIV test • Microchip
Kitten Premium	All of the above services plus: <ul style="list-style-type: none"> • Pre-anesthetic panel • Spay/neuter
Feline Adult Maintenance	<ul style="list-style-type: none"> • One or more comprehensive exams • Core vaccines • Non-core vaccines as recommended • Intestinal parasite check • Preventive deworming • Leukemia/FIV test (feline) • Ear swab and microscopic exam • Chemistry panel • CBC • Urinalysis and sediment
Feline Advanced Care/Adult Care Plus	Everything included in the Adult Maintenance Plan plus: <ul style="list-style-type: none"> • T4 • Routine dentistry
Feline Premium Care/Senior Care	Everything included in the Advanced Care Plan plus: <ul style="list-style-type: none"> • Two comprehensive exams • Chest radiographs • ECG • Blood pressure checks • Tonopen/Glaucoma screening

purchases typically experienced with preventive healthcare plan patients, and pet owners' willingness to choose ancillary services outside of the plan. In addition, discounts are a compelling incentive for pet owners to participate in preventive healthcare plans.

Discounting can be done across the board, with the same percentage applied to each service in the plan, or adjusted on a per-service basis. For example, a practice may choose to offer a 20% discount on all services in their Adult Maintenance Plan, or they may choose to discount each service individually based on the associated costs.

While there is no hard and fast rule regarding what clients are willing to pay on a monthly basis, it is common to see plans priced somewhere between \$25.00 – \$60.00 per month depending on the plan level and services included. There are many other factors that play a role in determining price, such as demographics, retail cost of services, and current client compliance.

The following is a simple example of how to begin determining the pricing structure for your preventive healthcare plans. One suggestion to assist with keeping things simple: Include all potential core vaccines when calculating plan prices, regardless of whether they will be given to every patient on an annual basis. If your practice follows

This Plan Pricing Worksheet is available in both Word® and Excel® formats in the Practice Resources Toolbox.

SAMPLE PLAN PRICING

FELINE ADULT BASIC	RETAIL PRICE	% DISCOUNT	PLAN PRICE	QUANTITY	TOTAL PLAN PRICE	PRICE/MONTH
Exams						
Wellness Examination	\$54.00	30%	\$37.80	2	\$75.60	\$6.30
Core Vaccines						
FVRCP	\$24.00	50%	\$12.00	1	\$12.00	\$1.00
Rabies	\$18.00	50%	\$9.00	1	\$9.00	\$.75
Non-core Vaccines						
FELV	\$28.00	50%	\$14.00	1	\$14.00	\$1.17
Treatments/Services						
Ear Swab/Cytology	\$24.00	50%	\$12.00	1	\$12.00	\$1.00
Fecal	\$28.00	40%	\$16.80	1	\$16.80	\$1.40
Deworming	\$15.00	40%	\$9.00	2	\$18.00	\$1.50
Diagnostics						
Chemistry Panel/CBC	\$139.00	30%	\$97.30	1	\$97.30	\$8.11
Urinalysis	\$38.00	30%	\$26.60	1	\$26.60	\$2.22
TOTAL					\$281.30	\$23.44

In this example you can see that the retail value of the plan services is \$437.00 and the plan price is \$281.30, which results in a client savings of \$155.70.

a three-year vaccine protocol, this also allows you to discount core vaccines at a higher rate than other services. While core vaccines are calculated in the price on an annual basis, they are only administered every three years.

ENROLLMENT FEES

It is recommended that a one-time enrollment fee be charged during the initial sign-up process. Not only does this solidify the client’s commitment to the plan, but can also help defray the cost of providing the initial services. Some practices choose to

charge the same fee regardless of the plan level, and others opt to tier the enrollment fee based on the price of the plan. Preventive healthcare plan enrollment fees can range anywhere from \$39.00 - \$100.00, as can be seen in the following example:

PLAN	ENROLLMENT FEE
Puppy/Kitten Basic	\$39.00
Puppy/Kitten Premium	\$49.00
Adult Maintenance	\$49.00
Adult Advanced	\$59.00
Adult Premium	\$69.00

There are many ways to apply the monies collected via enrollment fees, the most common of which include:

- To offset up-front costs from payment processing service provider
- To offset the additional administration time it takes to educate clients, review plan options, and sign up pets
- To offset discounting
- To improve cash flow
- To incentivize employees (discussed in detail in Chapter 6)

One last word about enrollment fees—it is imperative to put in writing the practice's policy regarding when and if an enrollment fee will be reassessed if an owner wishes to re-enroll a pet whose plan has lapsed. A simple solution is to offer a 2 - 6 month grace period, after which a re-enrollment fee will be required.

DOWN PAYMENTS

An alternative to charging an enrollment fee is to require a down payment. For example, a 25% down payment on the cost of an annual plan is required at sign up and the remainder is then spread out over 12 equal payments. Just as with an enrollment fee, a down payment can improve cash flow, offset plan start-up costs for the practice, and help ensure client commitment.

Optional Design Elements

Beyond the bundle of preventive care services, there are several value-added options that are commonly included in preventive healthcare plans. It is important during the plan design process to understand each of these and determine whether or not to you wish to include them.

DISCOUNTS ON NON-PLAN SERVICES AND PRODUCTS

Many practices have found that small additional discounts on products and services purchased outside the plans have significantly impacted both the plan acceptance rate as well as the willingness of owners to follow their veterinarians' treatment recommendations.

These additional savings can be applied across the board or selectively on services, medications, OTC products, and veterinary diets. For example, a practice may opt not to extend a discount on products that have a small profit margin. Whatever decision you make, be sure the team understands the discount structure, and state it clearly in all promotional materials so there are no misunderstandings.

To encourage the purchase of more comprehensive plans, it is suggested that non-plan service discounts be tiered based on plan level, for

example, a 5% discount for the most basic plans, a 10% discount for mid-level plans, and a 15% discount on the most comprehensive (expensive) plan.

COMPLIMENTARY OR DISCOUNTED OFFICE VISIT/EXAM FEE

Because the fee for an office call/exam can be a significant barrier to pet owners seeking treatment for their pets when there is a health concern, offering complimentary or discounted office visits can provide multiple benefits. For the practice, the increase in patient visits in conjunction with the purchase of ancillary services makes up for the office visit/exam fee. A certain number of complimentary office visits makes it much more likely that clients will visit more often and you will be able to more closely monitor patients and detect problems early. The opportunity for pets to receive the care they

need, when they need it, increases dramatically.

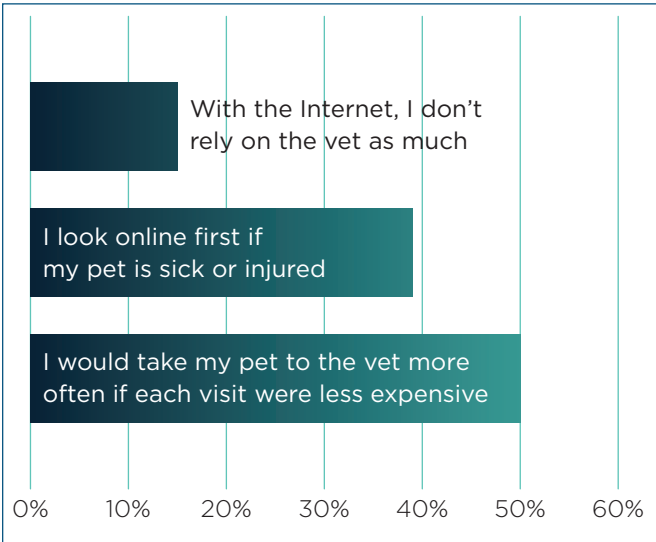
Research shows that cost barriers limit visits, and encourage pet owners to seek pet health advice from outside sources (see previous chart).*

The following are three of the most popular options for removing barriers to care and increasing visits:

- Unlimited complimentary office calls
- A specific number of complimentary office calls, such as 3 - 5, within the plan year
- A significant discount, such as 50% - 70% on office calls

MULTI-PET DISCOUNT

Many people love their pets so much that they can't have just one in their life! Often, though, not all of these pets receive preventive care on a regular basis. Your medical records most likely reflect this problem—there may be one or two active pets, while there are others in the same household that have not visited in several years. Much of the reason is a lack of understanding about the importance of preventive care on the part of clients. As we strive to improve in this area, clients will recognize the value of enrolling all pets in preventive healthcare plans. A small discount to incentivize them can go a long way to building a stronger practice-client bond.



*2011 Bayer Veterinary Care Usage Study.

Sometimes not being able to provide preventive care for all pets in a family is solely a matter of finances. For example, imagine that a client has two dogs and a cat. One dog has suddenly refused to eat, and when she brings him to the veterinarian she is informed that he not only has Grade 4 dental disease, but most likely will need several expensive extractions. All in all, the estimate for the dog's care comes to \$800.00 - \$1,000.00. As much as the client loves her pets, the dog's condition requires immediate attention, which means that in order to cover these costs she will be forced to delay preventive care for her other cat and dog.

Not only will preventive healthcare plans enable pet owners like this client to provide optimal care for all of their pets, but offering them a multi-pet discount is a way to reward them and let them know how much you recognize their commitment.

The following is a simple way to offer a tiered multi-pet discount:

1st pet enrolled	No discount
2nd pet	5% discount on monthly fee
3rd pet	10% discount on monthly fee
4th + pets	15% discount on monthly fee

Eligibility

The services offered in preventive healthcare plans should not be used to treat illness or injury. Consequently, a sick or injured pet is not eligible for enrollment. This is why it is critical that a thorough exam be performed on each pet prior to enrollment. That being said, many health conditions are transient and should not preclude a pet from ever being able to enroll in a plan.

Part of designing your preventive healthcare plan is determining what conditions will be considered transient and how long the patient must be symptom free prior to plan eligibility. These restrictions must be spelled out clearly and the entire team must be educated on the guidelines so there are no discrepancies. For example, if your practice determines that an ear infection is considered transient, and a pet that has no recurrence within two months of treatment is eligible to enroll in a plan, this must be applied consistently across the board.

A Designing Your Preventive Healthcare Worksheet is available in the Practice Resources Toolbox.

Practice-Client Contract

Clients that enroll in a preventive healthcare plan should sign a contract that spells out plan details, including price and payment schedule. This contract not only allows for the practice to withdraw funds from the client's account, but it also outlines

the practice's policies regarding plan service usage, automatic renewal, non-payment, cancellation, and upgrades. The contract should list the services included in the plan, the amount of the monthly payments, and the payment schedule.

Contract Inclusion Recommendations are provided in the Practice Resources Toolbox.

It is very important that this contract be reviewed with each client prior to enrollment to avoid misunderstandings in the future. It is also essential that clients be provided with a copy of their signed contract upon enrollment.

Veterinarian Production Pay

If the veterinarians in your practice receive production pay as part of their compensation, the production pay earned on preventive healthcare plan services should be based upon *the actual price of the services at the time that they are provided*. If you discount services in your preventive healthcare plans, then veterinarians will be paid production on the discounted prices, not the full retail prices.

While associate veterinarians may initially be resistant to reduced

production pay, history has shown that clients with preventive healthcare plans typically spend far more per year than clients without plans, so associate veterinarians typically earn more in the long run. In addition, plan clients tend to be more receptive to recommended treatments because routine preventive care is already factored into their budgets. Having a greater opportunity to do what is in the pet's best interest is tremendously satisfying for veterinarians, especially where the cost of care has previously been a major deterrent.

Veterinarians that take advantage of building individual relationships with clients and their pets will reap the greatest rewards from preventive healthcare plans due to the potential for an increased number of visits per pet each year. Practice teams should be trained to schedule upcoming appointments with the same veterinarian to provide continuity of care, which has actually been shown to positively influence pet owners' level of trust in treatment recommendations.*

CHAPTER 3: PAYMENT OPTIONS

How clients pay for preventive healthcare plans is one of the biggest decisions that will need to be made. Some practices are finding that clients are willing to pay for the entire plan at the time of enrollment, and that just having the ability to purchase discounted services, even without a monthly payment option, is enough of an incentive to enroll their pets. That being said, the ability to pay in small monthly installments can be a major driver of preventive healthcare plan success, and there are currently five common options for managing payments:

In-House Management

Practices can send monthly invoices and clients can remit payment via check or credit card. It is important to know that the Payment Card Industry (PCI) Security Standard places very strict requirements on holding credit card information—requirements typically not met in a veterinary practice. Consequently, practices should not hold client credit card numbers in the practice for any reason.

For the invoice to show the installment due, rather than the entire remaining balance, it will require that an open invoice be created in the practice

management software for the monthly payment amount. Otherwise, if the entire amount due for the year is entered as an open invoice to which payments are applied, the amount of the monthly payment must be handwritten on the invoice to avoid any confusion.

The problem with this option stems from the fact that payments received do not correspond to services performed, so the simplest thing to do is to create new service codes in the practice management software for all plan services with a zero charge attached. The other option is to use current service codes and add a line-item discount of 100% for all plan services, but this will make it harder to track important metrics such as plan service utilization. Unfortunately, this does not allow the client to view actual savings on their invoice at the time services are redeemed.

While in-house management may initially appear to be the simplest way to handle monthly payments, as your enrollments increase it can become extremely time-consuming to send statements and then process these payments as they are remitted. In addition, clients may not appreciate having to write a check or call the practice with their credit card information on

a monthly basis. Managing payments in-house also means that the practice is responsible for follow-up on all late payments or non-payment issues.

Private Banking Institution

Many private banks offer their business customers installment payment services via Automated Clearing House (ACH) withdrawals. In order for a bank to process monthly payments the practice will need to provide them with a client's checking account number and bank routing number.

The same process for documenting income in the practice management software as described for in-house management should be followed for ACH withdrawals. You should create unique codes for plan services with a zero charge, since payments made and services redeemed will not be in alignment.

Utilizing a bank, however, does not provide the practice with any payment reporting, nor does the bank handle follow-up on missed payments, "bounced" checks, or closed accounts. As plan membership increases, attempting to handle all of these issues in-house can result in additional administrative time.

Credit Card Processor

Some credit card processors offer

a service by which a client's credit card can be automatically charged a pre-specified amount on a monthly basis. You will need to speak with your practice's credit card processor to see if this option is available.

If you choose to document the monthly credit card payments in the practice management software and send a receipt to your clients, you will run into the same issues as with in-house management and ACH withdrawals—the payments do not align with services performed. Again, the simplest way to handle this is to create unique service codes in the practice management software for all plan services with a zero charge attached.

It is important to find out whether the credit card processing company provides follow-up on declined or cancelled cards, and if not, whether the practice will be immediately notified of these in order to initiate timely contact with the client. As with in-house management or ACH withdrawals, using a credit card processor can result in significant administrative time as enrollment increases.

Commercial Payment Processing Platform

There are commercial payment processing platforms that have been specifically adapted to handle preventive

healthcare plan administration. These companies offer clients the option of having their monthly payment either deducted from their checking account or charged to a debit/credit card. Client payments are then automatically deposited into the practice's bank account on a pre-determined schedule.

The practice will need to enroll clients through an online portal that is provided by the commercial payment company. The monthly payments do not need to be run through the practice management software. Instead, the deposit reports from the payment company should be entered into the practice's bookkeeping software and justified with the bank deposit statement. At the end of the month, these deposits need to be added to the revenue report generated by the practice management software to come up with the total gross revenue for the month.

While there are differences between commercial payment platforms services, they all include optional

pre-enrollment credit checks, non-payment follow-up, and collections. An added benefit is that automatic renewal notices are emailed on behalf of the practice, eliminating in-house administrative time.

Turn-Key Services

While turn-key services include many of the same features as commercial payment processors, they have been created solely for the purpose of managing veterinary healthcare plans and include additional value-added benefits such as sample plans, team training/support and marketing tools and materials. These companies have gone the extra mile to provide additional support via webinars and phone consultations, and in many cases a representative is available for in-house support and team training.

For practices that do not wish to offer the option of monthly payments, offering a third party payment solution such as CareCredit™ or Chase Health Advance™ is a way to encourage enrollment by minimizing clients' up-front costs. This allows the practice to be paid in full at the time of enrollment while the client can repay the total over a several-month period (in most cases) without incurring interest.

COMMERCIAL PAYMENT PLATFORMS

www.extendcredit.com
www.paymentbanc.com

TURN-KEY SERVICES

www.preventplans.com
www.partners-n-wellness.com

The companies noted above are those known to us as of June, 2012.*

* Commercial companies listed in this document are provided as examples for reader convenience only. The Partnership for Preventive Pet HealthCare does not recommend or endorse any specific company, and the list of companies offering services may change from time to time without notice.

CHAPTER 4: MANAGEMENT

Regardless of what practice management software you use, or how you choose to collect your payments, there is currently no seamless solution available for tracking preventive healthcare plan services and/or being able to demonstrate money saved on each invoice. Unfortunately this means that at least for now, there will be an added layer of administrative time and process to ensure that the plans are managed with the greatest accuracy.

As identified in the *Chapter 3: Payment Options*, one of the more problematic issues in managing preventive healthcare plans stems from the fact that payments received are not directly aligned with services performed. For example, a client may redeem \$135.00 worth of plan services in one month, but their monthly payment amount is \$29.00. If you processed this as you would normally do in the practice management software, an open balance of \$106.00 would remain on the account. This is one of the reasons it can be simpler to use a separate system, unrelated to the practice management software, to manage the monthly payments.

In most cases, the bundling/group function in your practice management software is the best way to manage preventive healthcare plans. Each

plan service should have a unique code and these services should then be used to create the specific plan bundles/groups. This provides the ability to run reports that track plan sales as well as individual plan service utilization. It does not, however, provide a simple way to view services used and services remaining on an individual patient basis, nor does it provide clients with the ability to view actual savings on their invoice.

Turn-key solutions and some of the commercial payment platforms have been specifically designed to account for individual patient service usage and to demonstrate actual savings per visit, although this does require additional time during the client check-out process. At the time of enrollment a pet will need to be designated as a plan participant in the practice management software and another account must be set up via the payment service provider portal. Some service providers have the ability to integrate their platform with the management software enough to “read” and copy information from the software directly into the platform, while others require that it be entered manually.

In all cases it is suggested that you communicate directly with your

practice management software support team and get their recommendations for setting up preventive healthcare plans in the software. The good news is that they will be receiving many calls just like yours, which will encourage them to work on creating a seamless solution in the near future!

Calculating Veterinarian Production Pay

Currently most practices have set up excel spreadsheets to calculate monthly veterinarian production pay for healthcare plan services performed. Determine ahead of time what the production is on the discounted price of each service and plug these

into the spreadsheet. Each month you will need to calculate the number of times that service was performed by each doctor in order to determine their preventive healthcare plan production pay, which can then be added to the production report generated by the practice management software.

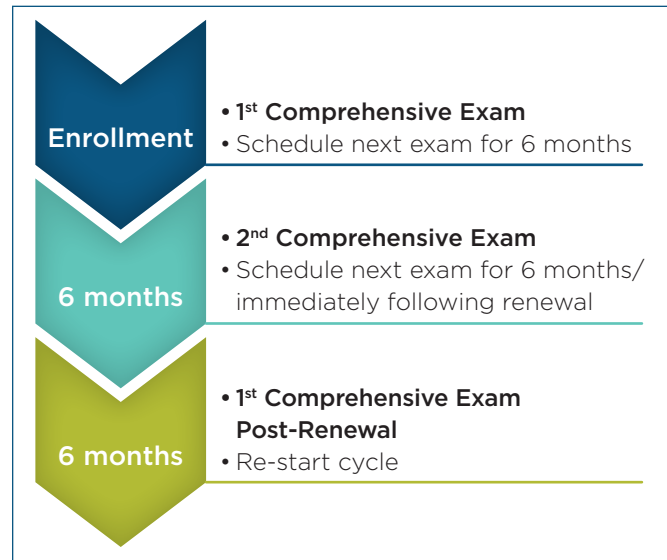
One of the benefits of using a commercial payment platform or turn-key service is that many allow for both a veterinarian production report and client savings report to be run through their portal. Once the system is pre-loaded with plan services, discounted prices, and retail prices, the software manages the rest, as long as the portal is updated at every visit.

CHAPTER 5: ADMINISTRATIVE PROCEDURES

The date that preventive healthcare plan services are provided to the pet is very important. In most circumstances a pet will be receiving a portion of its services at time of enrollment. For example, once a veterinarian has examined the pet and has confirmed that it is healthy enough for a plan, the owner then completes the enrollment and that examination will be considered the first comprehensive examination in the package. If other preventive care plan services are performed that day, these will be applied to the plan as well.

If your plans are designed to include two comprehensive examinations, the following is an example of a scheduling protocol that works well: Before the client and pet depart the practice during the enrollment visit, the second comprehensive examination should be scheduled for six months later—unless it is a puppy or kitten. Even if a client is unsure whether the date will be available in the future, let them know they will be receiving a reminder 2 - 3 weeks in advance so they can reschedule if necessary.

At the time of the second comprehensive examination, the next should then be scheduled for 6 months later, ideally immediately following the plan renewal date. The purpose is to



encourage renewal by maintaining the 6-month cycle, regardless of whether the plan auto-renews or not.

With the more comprehensive plans, services should be spread throughout the year. Although some practices prefer to enforce a 6-month waiting period on dentistry, if a pet would benefit from having the service performed sooner, enforcing the 6-month waiting period can be viewed as contradictory to the practice's commitment to preventive healthcare.

Managing Reminders

As important as reminders currently are for veterinary services, they are even more so when it comes to preventive healthcare plan services. Keep

in mind that services are not transferable from year to year, so if they do not get used within the contract year, they can no longer be redeemed. For pet owners to recognize the full value of a plan, their pet needs to receive all the services for which they have enrolled.

For this to happen, it may require significant changes to a practice's current reminder and follow-up protocols. Second and third reminder postcards should not be sent when first reminders for plan services do not result in a scheduled appointment. Instead, follow up should be initiated via phone, email, and text to ensure the services are scheduled in a timely manner. It is the practice team's responsibility to do everything possible to ensure enrolled pets receive the care recommended under the plan.

Renewals

It is suggested that plans renew automatically on the anniversary of the patient's enrollment date. This will be spelled out in the contract, but staff should be trained to highlight this section and review it with each client at the time of enrollment. A courtesy email notice should be sent 30 - 60 days in advance of the renewal date, reminding pet owners and offering them the opportunity to change or cancel their plan.

If renewals are not automatic, clients will need to re-enroll their pet on an annual basis, without paying a new enrollment fee, of course. In these cases the scheduling of the wellness exams immediately post-renewal date are even more critical to ensure continuity of care and client satisfaction.

Upgrading and Downgrading Plans

The simplest way to handle plan upgrades (or downgrades) is at the time of renewal.

If a client wishes to upgrade his/her plan during the plan term, the best way to handle it is to re-enroll the client in the higher level plan and change the renewal date to reflect the date of the upgrade. The same would be true for plan downgrades, although in that case you will need to make sure that the patient has not already utilized more services than have been paid for. If that is the case, the best scenario is to explain to the client that rather than pay out-of-pocket for these services, he/she continue on the current plan until it expires.

Since automatic renewal is highly recommended, there will be certain situations where a client should be notified of any plan changes or modifications. For example, puppy and kitten owners should receive correspondence

prior to their pet's renewal date letting them know that their plan will be upgraded to an Adult Maintenance Plan. This should include information on any changes in the monthly fee being deducted from their account or charged to their credit card. Similarly, if plan fees increase, clients should be informed that the fee being deducted from their account will change with the first payment after the renewal date.

Upgrading pets from an Adult Maintenance Plan to an Advanced Care Plan or a Senior Care Plan will usually require a conversation with the pet owner, although it is still an excellent idea to offer this option in any pre-renewal communications. Staff and veterinarians should make note of the need for these educational conversations when owners and pets are in the practice, regardless of whether it aligns with the plan renewal date (follow the suggested protocol in paragraph one of this section).

Handling Declined Credit Cards or Automated Clearing House (ACH) Withdrawals

When using a credit card processing company to manage payments, it is a good idea to keep a list of clients' credit card expiration dates (not account numbers). It should then become someone's additional duty to

contact anyone on the list 2 - 4 weeks prior to their card expiring, and before the next payment is due, to obtain updated credit card information.

If a credit card is declined for other reasons, the processor may be willing to try to run the charge again in a few days, but if so, make sure you ask if there are added fees. If the card still does not go through, it is the practice's responsibility to follow up with the client and obtain another means of payment.

If you are using your bank to process ACH withdrawals, make sure to ask their policy regarding re-attempts and any associated fees. Often a check that does not clear will have no problem clearing a few days later, and if they offer this service at no extra charge it can reduce the follow up calls that a practice must make. It can also minimize any potential embarrassment or frustration on the part of the client.

One of the major benefits of commercial payment platforms and turn-key services is that they follow-up on all declined cards or bank account withdrawals within 24 hours of the missed payment. While each service is different, the protocol usually includes several attempts at client contact and re-running of the credit card or check at no extra charge. Some services allow clients to choose the date that

their payment comes out of their account, which provides the opportunity to have it correspond with their paycheck. If necessary, and only with a practice's permission, these services can also send delinquent clients to a collection agency. Whatever the case, they will remain in contact with you and update you on the status of any missed payments.

Cancellation (Relocation, Dissatisfaction, Ownership Transfer)

There will be times when a client requests to cancel the pet's preventive healthcare plan. The most common way to handle these situations is to calculate the full retail value of the services utilized and compare that to the monies collected to date. If more money has been paid than services provided, the practice can release the pet owner from their contract. If the opposite is true, the options are to bill the client for the difference prior to releasing them from the contract, or to require that the remaining payments be made until the annual renewal date.

The best policy to enforce is that preventive healthcare plans are not

transferable to other pet owners or other pets in the same family (make sure this is clearly stated in the enrollment contract).

NOTE: Under consumer protection laws, clients may cancel their plan within 72 hours of signing their Agreement for a full refund including the enrollment fee.

Deceased Pets

The practice manager (or practice owner if there is no manager) should always be notified in the event of a plan participant's death. While each case should be handled on an individual basis, it is considerate for the manager to wait a few days after the loss of the pet before contacting the client regarding his or her preventive care plan.

Unlike plan cancellations discussed previously, in this case it is a nice gesture to release the client from the plan contract if the services used have been paid for based on the *discounted* prices. If there is a large discrepancy between services used and payments received it will be necessary to discuss this with the client and come to a mutual agreement on how to resolve the situation.

CHAPTER 6: INVOLVING THE TEAM

When implementing preventive healthcare plans it is critical to thoroughly train the entire practice staff. If they recognize that these plans provide owners with the ability to provide optimal care to their pets, they will generally gladly take the initiative to offer this opportunity to clients. In almost all cases, teams are comprised of individuals that have a passion for animals, and over the last few years they have had their share of exposure to the painful ramifications of pet owners faced with the inability to afford care for their pets. Providing staff members with a viable option to present to clients, and specifically one which they themselves could afford, empowers them to recommend optimal care without price sensitivity.

Because training is such an important element of successful plan implementation, in addition to this manual, please refer to the *Team Training Manual* and *Team Training Presentation* in the Practice Resources Toolbox to educate the entire practice team on the value of preventive healthcare plans.

Team Member Roles and Responsibilities

Every practice team member, regardless of their position, has the

opportunity to promote preventive healthcare plans. The following are general staff member expectations based on positions and duties within the practice.

PRACTICE OWNER(S)

Once the practice owner(s) has made the decision to implement preventive healthcare plans, the next step is to determine, in collaboration with associate veterinarians, the services and products to include in each plan. When promoting the plans with the team, it is important to focus on the value to the pet owner and the quality of care for the pet, as these are the most important staff motivators.

Practice owner(s) are the ultimate team leaders and should be very vocal about their enthusiasm and encourage team members to offer suggestions and get involved in the planning and execution phases. Preventive healthcare plans are both new and exciting and can go a long way in increasing the overall positive energy and level of teamwork in a practice.

PRACTICE MANAGER

The practice manager will most likely be the go-to person for implementation and team training. Before introducing the plans to the entire team

the practice manager should outline a training program and schedule, although it is also important and valuable to get feedback and suggestions from team members throughout the process. Just as with the practice owner(s), the manager's enthusiasm goes a long way to energizing and motivating the entire team.

Once the plans go "live," the practice manager should create frequent opportunities for the staff to hear him or her promoting the plans and explaining the value to clients. Not only does this demonstrate commitment and a "walk the talk" attitude, but staff can then use this approach to model their own client interactions.

ASSOCIATE VETERINARIANS

Success of preventive healthcare plans depends on the support and enthusiasm of every veterinarian in the practice. Veterinarians are role models for the practice team. If they truly believe in the value of preventive healthcare plans, so too will the staff. Clients especially will take their cues from the veterinarians. A client considering a preventive healthcare plan will no doubt want his/her veterinarian's opinion of the advantages and benefits before finalizing their decision.

Veterinarians will also be responsible for examining pets and determining

whether the animal is ineligible for a preventive healthcare plan. This function is critical to the whole preventive healthcare plan concept. If the veterinarian finds a condition that makes a pet ineligible for a plan, it is important to communicate fully, clearly, and tactfully with the client.

RECEPTIONISTS/CLIENT SERVICE REPRESENTATIVES

More often than not clients will first learn about a practice's preventive healthcare plans from a member of the reception staff. When they call for more information, it is the receptionist who is highly trained to answer their questions and provide a brief summary of the plans, the advantages and benefits, and details about pricing.

It is so important that everyone at the front desk delivers a consistent message when welcoming clients, providing written materials and educating them about the practice's commitment to preventive care. Receptionists will also likely take the client through the enrollment process once the doctor has seen the pet and determined eligibility, so they must understand and be able to thoroughly review the contract and plan components prior to obtaining the client's signature.

At checkout, receptionists should reinforce the value of the plan, highlight

the cost savings, and set the client's expectation of "what's next" by confirming the date of the pet's next appointment and the services that will be provided.

VETERINARY TECHNICIANS AND ASSISTANTS

Technicians and assistants will often be the second point of contact for clients, and they need to be just as knowledgeable about the plans as the client service representatives. In some cases, a client may wish to talk to a technician or assistant in greater detail about the health benefits of enrolling their pet in a plan prior to making a decision, which is why it is crucial that they be well versed in the value of preventive medicine and be able to express this clearly and consistently to pet owners.

The enthusiasm of your technicians and assistants can have a significant impact on the success of the program. Not only are they involved in the delivery of the plan services but can highly impact the level of efficiency in delivering these services.

KENNEL ATTENDANTS

Kennel attendants have the opportunity to spread the word about a practice's preventive healthcare plans when a pet is dropped off or picked up from boarding. When appropriate, they should let clients know "we have

these fantastic plans; I'd be happy to have (name) tell you all about them." In some cases pets will be scheduled to receive services during their boarding stay, and while their owners should have been presented with plan information and the option to enroll their pet in a plan prior to drop-off, the kennel attendant's responsibility is to ensure no one falls through the cracks.

Recommendations for Improved Team Training and Maintaining Team Enthusiasm

As mentioned earlier, preventive healthcare plans are naturally appealing to practice team members, because they make quality care accessible to more pet owners. But as with any new initiative, it is normal for commitment and enthusiasm to waiver a bit based on a variety of factors including lack of consistency in training, management's and ownership's inability to "walk the talk," increased appointments, the level of success in converting pet owners, and a multitude of other factors that arise on a daily basis. To weave preventive healthcare plans into the fabric of the practice culture, additional incentives and reminders along the way can help to keep the initiative front-and-center in everyone's mind.

SYSTEMS FOR SHARING SUCCESS

As part of the preparation process, management and ownership should determine a variety of ways to share and celebrate success stories that result from pets being enrolled in preventive healthcare plans. While management, or a designated team member, will be responsible for sharing heartwarming success stories via the practice website, social media, e-newsletters, etc. (with an owner's written permission), it's an excellent idea to also set up a "wall" in the break room where staff is encouraged to post and share their own rewarding interactions and stories. The impact of contributing to and enhancing the positive "vibe" that comes from the opportunity to practice great medicine and build stronger personal relationships with clients and patients will help to ensure that your preventive healthcare plans become firmly rooted in your practice.

In addition to these stories, monthly target goals and the current progress in meeting those goals, should be posted for all to see. When goals are met or exceeded, owners and managers should take time out of their busy schedules to openly acknowledge and thank the team for their hard work.

PROVIDING FOR STAFF PETS

Another opportunity to ensure that team members recognize the value

of preventive care is to offer each of them the opportunity for one of their pets to receive these plan services at a highly reduced rate. While most practices already offer highly discounted veterinary services to their staff, for whatever reason many of them still do not have preventive diagnostics or examinations performed on all of their pets on a regular basis.

If this benefit were offered as part of the training program, and time was specifically allotted for these appointments so they were conducted just as they would be for a paying client, it can go a long way in ensuring 100% staff commitment to the program. Just as with clients' pets, a separate posting board should be made for staff pets where initial findings and progress reports are shared and celebrated publicly—include photos, quotes, lab results, etc. If staff members are willing, their stories can also be shared via the website and social media as personal endorsements for the plans.

Financial Incentives

There are significant benefits to offering a financial incentive to encourage strong team support for preventive healthcare plans. Team members will not only feel appreciated, but will see this as an affirmation that practice

leaders recognize and appreciate the additional time and effort they have committed to making the plans successful. When incentives are team-based and tied to specific practice goals (see Chapter 7), they are a great way to build and maintain program support within the practice.

A portion of the enrollment fee can be used for employee incentives. For example, if the practice's goal is to enroll 30 pets in preventive healthcare plans in the month of June, and 35 pets are enrolled, then the practice contributes \$10.00 from each enrollment fee (a total of \$350.00) into a fund to be distributed as a bonus to team members. However, if the practice enrolls 27 pets, no incentive is distributed.

Client Communication Scenarios

The following are some of the most common client communication opportunities that will present themselves on a regular basis.

CURRENT CLIENT IN HOSPITAL

When current clients bring a pet in for a wellness appointment there is a good chance a receptionist has already discussed preventive healthcare plans on the phone when the appointment was made, but whether or not they have already been given

information, the receptionist should bring preventive healthcare plans to their attention after greeting them and checking them in for their appointment. The receptionist should ask if they have already heard about the plans and if so what questions they might have. They may want to begin the enrollment process immediately, taking into account that before the plan goes into effect the pet will have to be certified as healthy. If this is the pet owner's first exposure, the receptionist will explain what they are, the reason the practice has chosen to offer them, and begin outlining the various options. The client should be given a brochure and any other written material to read while waiting for their appointment.

The receptionist should notify the technician or assistant regarding what information has been given to the client, so they know exactly where to pick up the conversation in the exam room. The same is true when a technician or assistant preps the doctor before they go into the appointment. Even if a client declines a plan, this should be noted in the record, as should any veterinarian's determination that a patient is permanently or temporarily ineligible.

If one of your clients is in the practice for something other than an appointment (such as to pick up a

prescription or food), and has not yet heard about your preventive healthcare plans, it is the perfect time to provide them with some initial information. Whomever they speak with in the practice should explain the purpose of the plans and what it is that makes them so valuable. Offer clients a brochure and let them know that they can get even more information on your website. They may want to begin the enrollment process right then and schedule an examination for their pet in the next day or two.

Sometimes clients will present a pet for treatment that is not eligible for a plan. But there is still an opportunity to check their records to see if they have other pets at home that would be eligible, and then start the dialogue and information-sharing process. If you haven't seen their other pets within the past twelve months, this is the *perfect* time to encourage them to consider your new and unique offerings!

CURRENT CLIENT ON PHONE

When current clients call for any reason, they should be asked if they have heard about the new preventive healthcare plans the practice is offering. Let them know how excited everyone in the practice is about the plans, what they include and how they are set up. Offer to mail or email them more information and

direct them to the website. If there are active conversations regarding your plans on social media sites, you definitely want to suggest they check these out as well, since there is nothing as persuasive as positive feedback from other pet owners.

NEW CLIENT ON PHONE

Potential new clients or phone shoppers should always be given information about preventive healthcare plans immediately. If they begin the conversation by asking about fees, the receptionist should respond, "We actually do things a bit differently here at ABC Animal Hospital—we offer preventive healthcare plans, which are annual packages of preventive services that are not only discounted but can be paid for in monthly installments. I would be happy to send you some information and you can also learn more on our website, www.abc.com. We've been offering these for several months now and our clients and patients absolutely love them!" If there are active conversations regarding your plans on social media sites, you definitely want to suggest they check these out as well.

If an appointment is scheduled, it is a good idea to briefly note in the medical record or on the appointment schedule what was discussed and the client's level of interest is in enrolling his/her pets.

NEW CLIENT IN HOSPITAL

Beyond providing a warm greeting to all new clients that enter the practice, the receptionist should ask them if they have heard about your plans, and if so what, if any, questions they may have. Based on their level of interest, the receptionist may want to offer to start the enrollment process before the appointment. If they have not yet heard about the plans, take the time to explain the benefits and how they work and make sure to give them a brochure and any other written material available to look over while they wait for their appointment.

Any information that the reception team provides the client should be transmitted to the technician or assistant verbally and written in the patient's chart so they know exactly where to pick up the conversation. The same is true when a technician or assistant preps the doctor before they go into the appointment. Even if a client declines a plan, this should be noted in the record, as should any veterinarian's determination that a patient is permanently or temporarily ineligible.

CHAPTER 7: EXPECTATIONS, GOAL SETTING, AND KEY PERFORMANCE INDICATORS

As with any growth initiative, it is important to define both short-term and long-term performance expectations and goals for preventive healthcare plans and to share them with the entire practice team. Not only does this ensure the program remains a priority for everyone, but when short-term goals are met, it provides an opportunity to celebrate successes along the way, thus achieving a “snowball” effect. For this reason, team goals should be attainable, and can then be increased as you move forward. Success breeds success.

Enrolling 20% – 40% of clients’ healthy pets within 1 – 3 years is a realistic goal. For new patients, the enrollment rate can be even higher. If the practice does an effective job of marketing preventive healthcare plans, overall new client numbers should begin to climb as well. For this reason it is important to track new and existing clients separately when measuring progress against goals.

The ultimate goal of preventive healthcare plans is to deliver 100% of plan services to each patient. Realistically, an overall delivery rate of 85% – 90% should be a minimum target, using a thorough reminder protocol and

tracking system. A practice’s service delivery percentage rate will be directly mirrored in its renewal rate. Practices with experience in preventive healthcare plans report that renewal rate drops when clients utilize 70% or less of the services to which they are entitled.

As plans complete their first annual cycle, it is very important to track the renewal rate on a monthly basis. It is suggested that a protocol be implemented where the medical records for all patients with plans renewing in a specific month be pulled 2 – 3 months prior to renewal and reviewed for service usage, missed appointments, etc. This will give you time to contact the client and have them schedule their pet for any remaining services. If more than a few patients come up on this list every month, this may indicate a broader problem, and it is time to go back and make sure your reminder system includes adequate email, phone, and text client follow-up and that team members are carrying through with these protocols.

Key Performance Indicators (KPIs)

Regardless of whether a practice offers preventive healthcare plans or

See the *Practice Report Card Worksheet* provided in both Word® and Excel® in the Practice Resources Toolbox.

not, there are certain KPIs that should be measured on a monthly and annual basis. Those that can be affected by implementing preventive care plans include but are not limited to:

- Active feline patients
- Active canine patients
- Active clients
- Number of visits of plan pets versus non-plan pets (canine and feline)
- Annual spending of clients with plan pets versus non-plan pets (canine and feline)
- Gross revenue

Not all of these metrics are easy to obtain from your practice management software, and this is another time you should talk to your practice management software support team for recommendations. They may be able to build the reports you need even if they are not part of the standard report offerings.

Because the purpose of preventive healthcare plans is to encourage more owners to provide services for their pets, individual service usage is an important KPI as well. For example, in the first few months after introducing your plans, the number of fecals, vaccines, and heartworm or feline leukemia/FIV tests being performed should increase. As time goes on there should also be a significant increase in wellness exams (especially

if plans include two per year), dentistry, and other services that are included in the plans and redeemed throughout the year.

Remember, in most cases your plan service codes will be different from your standard service codes in the practice management software, so you will need to pull both of these. You can add them together to see overall growth, but it is also a good idea to look at them separately to determine the growth is in fact a result of plan usage.

Average Client Transaction (ACT)

One of the key performance indicators practices tend to focus heavily on is the average client transaction charge per veterinarian.

Once preventive healthcare plans are in place, the focus will switch from trying to get pet owners to perform all annual services at one time to spreading out more services over the course of two or three visits. While this increase in visits, accompanied by a willingness to perform additional services, may lead to a decreased ACT, it typically leads to higher annual revenue per patient.

The bottom line is that you need to be carefully monitoring all key

A Service Usage Metrics Worksheet is provided in both Word® and Excel® in the Practice Resources Toolbox.

performance indicators on a monthly basis so success can be celebrated and potential problems or negative trends can be found and reversed.

Perception of Value is a Critical Metric

Important data isn't just about numbers and percentages—these don't tell the whole story. Obtaining client feedback is equally important in determining whether your preventive healthcare plans are meeting expectations and improving the perception

of value regarding the type and quality of care pets receive. Plan members should be sent an annual or bi-annual survey so the practice can ensure the plans are providing recognizable value to pets and their owners. Start by sending a survey six months after introducing plans into your practice so if there are any concerns or issues you were unaware of they can be handled and improved upon in a timely manner. If a specific client is dissatisfied, this also provides an opportunity for you to reach out and address their concerns.

CHAPTER 8: MARKETING

The objective of having a dedicated marketing plan for preventive healthcare plans is to inform as many pet owners as possible that your practice now offers a new way to provide pets with the highest quality of care that is affordable and easy to manage. The goal is to let current and potential future clients know that your practice is dedicated to making high-quality preventive care accessible to their pets.

There are three distinct audiences that need to be considered when designing your marketing plan.

Audiences

CURRENT CLIENTS AND PATIENTS

When your practice initially rolls out preventive care plans, this should be the easiest group to convert into plan purchasers. They are familiar with your practice and if they have previously been diligent about preventive care, the value of enrolling their pets in one of the more comprehensive plans, especially those with dentistry, will be more easily recognized. Remember...these clients can be your practice's greatest advocates and should be asked to help spread the word and create "buzz" about your preventive care plans.

CURRENT CLIENTS WITH PETS THAT YOU HAVE NOT SEEN RECENTLY

This is an untapped source of new patients and plan enrollees. Research shows that clients often have pets, typically cats, at home that they do not take to the veterinarian regularly. There are a variety of reasons, including the cost of care, a lack of education, and the adoption of 3-year vaccine protocols. When it comes to felines, these reasons are compounded by the difficulty of transporting cats to the practice, the misconception that indoor cats don't need care, and the fact that cats are incredibly stoic creatures excellent at hiding illness and pain.

Our clients want to do what is best for their pets, and it is up to us to help them recognize how preventive healthcare plans can make this a reality. If your plans offer monthly payments and/or multi-pet discounts, take the time to emphasize these added benefits and you will see your enrollment grow exponentially.

NEW CLIENTS WITH NEW PETS

New clients will not always be aware that you offer preventive healthcare plans. If a new client schedules a wellness appointment, it is important

to provide them with as much information as possible prior to their visit. Sending them to the preventive healthcare plan page on your website and/or mailing them a brochure can save a great deal of time. More often than not, they will arrive for their appointment ready to enroll their pet in a plan.

If new clients are bringing in their pet due to illness or injury, it is still the perfect time to educate them about your plans and provide them with written information, unless the extent of disease/injury makes the pet ineligible. If their pet's condition is considered transient by your guidelines, make sure to let them know how soon their pet will be eligible to enroll and enter a reminder to give them a call at that time.

Touch Points

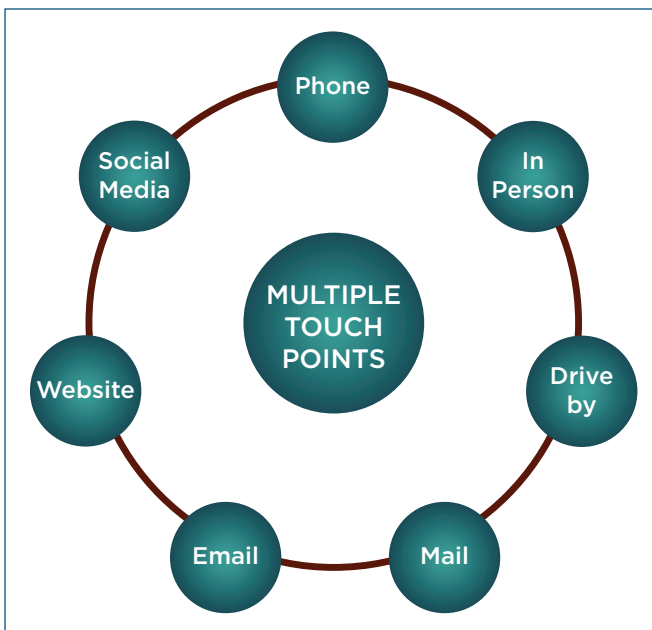
Not only are there several different types of audiences to address, there are multiple “touch points” that provide a practice with the opportunity to disseminate information about their preventive healthcare plans. The key is to ensure that at every juncture the message and information provided is clear and consistent.

The Marketing Plan

Prior to going “live” with your preventive care plans it is important to have a solid marketing plan in place that takes each of the above touch points into consideration. While everything does not necessarily need to be ready to go immediately, the following communication tools and opportunities are considered integral elements of a comprehensive approach to getting the word out about your plans.

BROCHURES

Practices should create an individual color brochure for both their feline and canine preventive care plans. The brochure should outline the benefits of preventive medicine and the differences in the different plan levels. If additional benefits are offered, such as multiple pet discounts and discounts on non-plan services, these should also be emphasized. While it is not recommended that the brochure list every service or the prices for each plan, it



is important to highlight whether the plans include discounts, as well as if monthly payments are available. Keep the brochure clear and simple so that it encourages clients to call or come in to the practice for more information.

Keep in mind that some turn-key payment services offer customizable brochures as part of their practice support tools.

WEBSITE

Not only should a “can’t miss” banner be added to the home page, but an entire section of a practice’s website should be devoted to emphasizing the importance of preventive medicine and highlighting the specific plans available. These descriptions can be more detailed than those in the brochure, and many practices choose to include a list of services and the cost for each plan. It needs to be clearly stated that an examination is required prior to enrollment and explain how and why a pet could potentially be excluded from enrolling in a plan. Providing links to PDFs of a sample client-practice contract and enrollment application are also a good idea—when clients are familiar with the plan specifics it can significantly decrease administrative time during the onsite enrollment process.

This section of the website should also include articles on the

importance of preventive medicine, approved links to canine and feline veterinary information sites, and a page where the practice and/or clients can share testimonials and photos of pets that have benefited from plan membership (make sure to get a client’s signed approval before posting their pet’s photo).

SOCIAL MEDIA

Social media is the perfect tool for getting the word out about preventive care plans. If your practice already has an active social media presence, now is the time to take advantage of your friends, followers, and brand advocates by encouraging them to spread the word about this great new offering. Don’t be afraid to ask satisfied clients to share their experiences with others; not only will they be flattered that you asked, but the fact is that pet owners love sharing stories and photos with other pet owners.

Consider creating a video that provides basic plan information and describes the benefits of preventive pet care—this can be made available via multiple social media platforms and on the practice website.

INDOOR AND OUTDOOR SIGNAGE AND/OR BANNERS

When appropriate, a practice should advertise their preventive care plans on the inside and outside of the

facility. Some practices have outdoor marquees that they can use to highlight plans, but even with a marquee, the addition of a large banner or sign that says something like *“Ask Us About Our New Preventive Healthcare Plan Packages”* outside the building will spark a lot of interest.

If informational material is hung on the interior walls it should be professionally designed and framed. One exception to this rule is to have a large board displaying the photos and names of every pet (with the client’s permission) that has been enrolled in a preventive care plan to date. Being able to see how many other pet owners have made the commitment can be highly persuasive for someone in the midst of deciding whether or not to enroll their pet.

INVOICE AND POSTCARD MESSAGES

Most practice management software systems allows you to add a customized message at the bottom of every client invoice, and you definitely want to take advantage of this opportunity to add a message such as, *“Did you know that we now offer preventive healthcare plans with monthly payments? Call us or go to www.mypethospital.com for more information!”* The same message should also be added to postcard and email reminders.

ON-HOLD MESSAGE

Just as with printed messages on receipts and reminders, it is important to use all the tools at your disposal to announce and educate pet owners about the benefits of your preventive healthcare plans. If you already use an on-hold message system, take this opportunity to rewrite your scripts to include at least one section that tells listeners about the benefits of your unique offerings.

COMMUNICATION WITH CURRENT CLIENTS

If your practice has been diligent in collecting client email addresses, this is the perfect time to put them to good use! When you are ready to announce your plans, send an email blast to your clients with all of the information, a direct link to the preventive care section of your website, and an invitation to call or stop by for more information.

Sending informational letters and a brochure to clients can also be very effective, although the added expense of postage and materials may require the list to be more limited.

PRESS RELEASE

A press release should be sent to local newspaper, radio, and TV stations announcing your practice’s preventive healthcare plans and specifically emphasizing the practice’s

overwhelming commitment to helping pets stay healthy. While you may not always get a response, local pet stories are a big draw and can be a tremendous source of free advertising.

OPEN HOUSE

Holding an open house at the same time as going live with your plans can generate added interest and an increase in early enrollments. Make sure there are plenty of doctors and staff available to discuss the plans and answer questions. If you anticipate a large turnout, consider holding one or two informational presentations followed by question-and-answer sessions. It's also a good idea to designate a specific staff member to be available for scheduling the pet's initial examinations within the next few days. To cut down on the administrative time on the day of the appointment, send clients home with individual plan information and prices (or direct them to your website), along with an application and contract to review.

PROMOTIONAL MATERIALS

Investing in promotional materials is a great way to keep interest high amongst your team. Consider having pins, stickers, and/or t-shirts that advertise both your practice and your

preventive care plans. Have fun with it and designate one day a week for everyone to wear their t-shirts to work.

Pet bandanas are relatively inexpensive and can be given to every patient that enrolls in a plan. These should include the practice name and logo and a message such as *"I'm a proud member of ABC Animal Hospital's Preventive Healthcare Plan Club."*

NEW CLIENT PROMOTIONS AND ADVERTISING

Whether to pay for advertising is completely up to a practice, but if you are already enrolled in media campaigns to attract new clients, such as coupon books or television commercials, make sure to update your message to highlight preventive healthcare plans.

The sky's the limit when it comes to marketing, but the key is to ***get the word out to as many pet owners as possible, as quickly as possible***, and in as many ways as possible. Once these individuals enroll their pets and become strong proponents for the benefits of your plans, the word will spread, creating a snowball effect that will ensure not only are your plans a tremendous success, but that your entire team remains committed and enthusiastic.

CONCLUSION

Preventive healthcare plans are an important option to consider when looking for new ways to catalyze practice growth. More importantly, they make it easier for pet owners to provide high-quality care for their pets. Although it may initially seem a daunting task to implement preventive healthcare plans, this manual, as well as the supporting worksheets and training materials, will help clarify the decisions that need to be made and speed the implementation process.

Ultimately, preventive healthcare plans can truly be a “triple-win” initiative: Veterinarians and veterinary team members have the opportunity to provide optimal care for a greater number of pets, pet owners can afford to provide this care, and most importantly, their four-legged companions receive the care they need to lead healthier lives.



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