partners
FOR HEALTHY PETS

Preventive Healthcare Plans:

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

Team Training 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 *Team Training Manual* provide tools and information for companion animal veterinarians and managers who are ready to train their teams on the importance of integrating preventive healthcare plans into their practice models. Companion pieces to this manual include the *Overview*, *Implementation 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 www.partnersforhealthypets.org.

Partners for Healthy Pets gratefully acknowledges the contributions of John Volk and Jessica Goodman Lee, CVPM, of Brakke Consulting, Inc.

Contents

Foreword 3

Chapter 1: Explaining the "Why" of Preventive Healthcare Plans 4

Chapter 2: Team Member Roles and Responsibilities 5

Chapter 3: Training Schedule 7

Chapter 4: Goals and Incentives 10

Chapter 5: Role Playing 12

Conclusion 15

Appendix: Other Materials 16
- PowerPoint® Presentation
- Client Communication Flow Charts
- Roles and Responsibilities Grid

Preventive Healthcare Plan Team Training Manual

Brought to you by the Partners for Healthy Pets

FOREWORD

Team training is a critical component of successful preventive healthcare plan implementation—it is truly the glue that holds the entire initiative together! Every member of the practice must be well versed on the purpose and value of preventive healthcare plans, as well as specific details such as services, plan levels, cost, discounts, and any additional benefits being offered. They need to understand the responsibilities assigned to their position and be able to provide a consistent message to clients and answer their questions. Many must also learn the technical aspects of the plans, such as how the plans are set up in the practice management software and how payments are processed.

Having a well-designed training program is just as important as having well-designed preventive healthcare plans, and while team training may seem overwhelming at first, it helps to break it down into four specific areas in which the staff needs to gain proficiency:

1. The "why" of preventive healthcare plans with a focus on the benefits to clients and their pets
2. Your practice's specific plans and protocols
3. The roles and responsibilities for each position within the hospital
4. Client communication and appointment flow expectations

The materials in this manual will provide you with tools for team training in each of these areas. There is also an accompanying PowerPoint® training presentation that can be utilized to introduce preventive healthcare plans in group training sessions.

If you've reached this point in the implementation process you've already put in a lot of hard work and are almost to the finish line—keep up the good work and your plans are going to be a HUGE success!

CHAPTER 1: Explaining the "Why" of Preventive Healthcare Plans

When introducing preventive healthcare plans to the practice team, start by focusing on the reasons that your practice has chosen to offer them:

- To promote the importance of preventive medicine as a means to improve and extend pets' lives
- To offer affordable monthly payments as a means for owners to provide their pets with high-level preventive healthcare medicine on an ongoing basis
- To reduce large, unexpected costs due to early disease diagnosis and treatment

Team members will be motivated to offer preventive healthcare plans once they recognize the positive implications of making it easier for more pet owners to provide a higher level of veterinary care for their pets. Having a viable option to present to clients, and even one which they themselves could afford, empowers them to recommend optimal care without price sensitivity. The staff will feel a sense of pride and loyalty when they feel that their personal priorities, and those of the practice, are in perfect alignment.

Each member of the practice team must truly view themselves as engaging in a partnership with every client. When partnerships are formed, the individual goals of each party are unified, and in this case it is the pets that are the ultimate beneficiaries of this strengthened relationship. A commitment to this mindset can have far-reaching effects, not only when it comes to preventive healthcare plans, but for the practice in general.

It is very important to educate the staff on is the difference between preventive healthcare plans and pet insurance, since they in turn will be expected to explain this to clients. Pet owners need to be told that preventive healthcare plans do not cover the costs of unanticipated medical or surgical care (this also needs to be highlighted on the application paperwork and contract). Stating this clearly at the time of enrollment, as well as including a pet insurance recommendation in conjunction with preventive healthcare plans, is the best way to avoid any potential misunderstandings in the future.

CHAPTER 2: Team Member Roles and Responsibilities

Every practice team member, regardless of his or her position, has the opportunity to promote preventive healthcare plans. The following is a general outline of roles and responsibilities based on positions and duties within the practice. As your implementation protocols are determined, these descriptions should be customized and provided to each team member as part of their training materials.

See *Roles and Responsibilities Grid* in the Appendix, which can be provided as a team handout.

PRACTICE OWNER(S)
Role: • To demonstrate to the practice team, as well as to clients, a deep commitment to providing an increased number of pets with optimal veterinary care through the recommendation of preventive healthcare plans. As with any initiative requiring significant change management, the importance of senior leadership communicating clear expectations and accountabilities cannot be overemphasized.
Initial Tasks/Responsibilities: • Approve plan design, training program, and marketing materials • Develop clear inclusion/exclusion enrollment criteria • Obtain associate veterinarians' input • Assist manager with team training • Approve enrollment goals and team incentive program • "Walk the Talk" at all times
Ongoing Responsibilities: • Remain a strong plan proponent with both staff and clients • Support and approve management's recommendations • Help to keep staff enthusiasm level high • Celebrate practice successes and address opportunities for improvement

PRACTICE MANAGER
Role: • To demonstrate a commitment to the success of preventive healthcare plans in the practice through team training and program management
Initial Tasks/Responsibilities: • Design plans, training program, and marketing materials • Train team, obtain input, and integrate plan improvement suggestions • Set enrollment goals • Manage administrative tasks
Ongoing Responsibilities: • Track KPIs and overall program success • Manage incentive program • Provide ongoing training where needed • Share client feedback with the team • Share success stories with the team • Maintain a long-term marketing strategy

ASSOCIATE VETERINARIANS

Role:

- To demonstrate to the practice team and to clients a deep commitment to providing an increased number of pets with optimal veterinary care through the recommendation of preventive healthcare plans

Responsibilities:

- Know all plan components
- Educate clients about benefits of plans and recommend enrollment
- Use tools such as pet health report cards and pet health libraries to educate clients
- Examine pets to confirm eligibility

Ongoing Responsibilities:

- Recommend preventive healthcare plans to clients
- Increase usage of non-preventive care services
- Share success stories with team and other clients
- Build veterinarian-pet-owner partnerships and increase practice loyalty

RECEPTIONISTS/CLIENT SERVICE REPRESENTATIVES

Role:

- To be enthusiastic plan proponents who introduce and educate clients on plan services and manage the plan enrollment process

Responsibilities:

- Know all plan components including pricing
- Act as first point of contact via phone or in-person
- Provide clients with additional information sources
- Conduct enrollment process
- Schedule appointments
- Highlight savings
- Remind clients of upcoming appointments

Ongoing Responsibilities:

- Continue performing initial responsibilities and gaining client commitment to enrolling their pets

VETERINARY TECHNICIANS AND ASSISTANTS

Role:

- To be enthusiastic plan proponents who not only educate clients on plan services and value but obtain clients' enrollment commitment

Responsibilities:

- Know all plan components including pricing
- Act as second point of contact, usually in exam room
- Communicate follow-up schedule to receptionist
- Conduct "day after" client call backs to ensure satisfaction

Ongoing Responsibilities:

- Continue performing initial responsibilities and gaining client commitment to enrolling their pets
- Encourage ancillary services
- Conduct client callbacks to ensure plan services are redeemed
- Share success stories with the rest of the team

KENNEL ATTENDANTS

Role:

- To increase awareness of plans among owners of boarding pets

Responsibilities:

- Know basic plan components
- Refer interested clients to receptionists or technicians for more information

Ongoing Responsibilities:

- Continue performing initial responsibilities and improving client communication skills

CHAPTER 3: Training Schedule

In most cases, all-team training can be accomplished over the span of 2 - 3 meetings. For retention purposes the less time between meetings the better, but at the same time covering all the material in one extended meeting can lead to information overload, which is often just as problematic when it comes to retaining information. In most cases, 2 - 3 meetings should provide enough time to get through all of the material, answer questions, get team input, and role play. It is also recommended that each successive meeting begin with a brief oral or written quiz that reviews the material from the previous meetings.

All-Team Meetings

MEETING 1

At the time of your first meeting there is a good chance team members have already heard "rumors" about the plans, so you want to make sure that you immediately address any pre-existing rumors that may or may not have a negative effect on obtaining staff buy-in. While they may have lots of questions, it is best to ask that they save these until you have had a chance to explain the plans, their purpose, your expectations, and the new mindset. Use the PowerPoint® presentation in the Practice Resources Toolbox to assist you.

Use the PowerPoint® presentation in the Practice Resources Toolbox to assist you.

Each staff member should receive handouts that detail the plans and pricing. Let them know that they will be expected to review this information on their own and will be given a brief quiz at the next meeting.

MEETING 2

Begin by reviewing the team's knowledge of the plans from the handouts previously provided. Spend time addressing concerns, answering questions, and discussing the *Roles and Responsibilities Grid* in conjunction with the *Client Communication Flow Charts* (found in the Appendix).

As you move on to new material, distribute copies of suggested conversation starters. While role playing can be awkward at first, it provides immeasurable value and is critical to ensuring good client communication skills. Include everyone in the process, discuss after each "skit" and continue to repeat these until everyone is comfortable. Do your best to make it fun and unintimidating!

MEETING 3

If you are going to implement a staff incentive program, now is the time to introduce it. Also, if you are going to have a team preventive healthcare plan communication board, set it up ahead of time and explain how it should be used. Make time for final questions, focus on building enthusiasm, and reinforce the philosophy behind the entire program.

Make sure everyone has been exposed to the various marketing materials available, whether on your website or in print, and let them know of any social media or other campaigns that are underway. Distribute promotional materials such as pins and t-shirts and celebrate!

TIP: It is a great idea to hold this last team meeting the day before your plans go "live" since everyone's enthusiasm is at a high point.

FOLLOW-UP ASSESSMENT MEETINGS

You should also consider follow-up team meetings at 30, 90, and 180 days to assess the progress of the program implementation process. Seek input from the entire staff as to what seem to be the greatest challenges they are facing and to share success stories. There will undoubtedly be some unanticipated barriers even with a great training program. Including the entire team to help develop solutions to the challenges will enhance team morale and will also provide valuable insights to improving the program and processes.

Individual Team Meetings

In addition to the all-team meetings, you will need to hold individual meetings with each department to carefully review its role in promoting preventive healthcare plans. While technicians and assistants should only require one meeting, multiple meetings and training sessions will be required for the receptionists, since they will be handling the majority of the administrative work.

RECEPTIONISTS/CUSTOMER SERVICE REPRESENTATIVES

It is the receptionists that will be handling a majority of the initial communication regarding preventive healthcare plans, and they will need additional time rehearsing scripts for a variety of communication scenarios.

In most practices the receptionists are also going to be responsible for the administrative duties surrounding the plans, including the sign-up process (which includes obtaining payment information and contract review), invoicing, scheduling, and appointment reminders. If you are using a commercial payment platform or turn-key solution, this will involve some dual entry using an online portal separate from the practice management software. They will also need to be able to set a pet up as a plan participant in the practice management software.

Everyone must be comfortable performing each of the above tasks so that the work does not fall to one or two people. This may mean taking additional one-on-one time with individuals who are not as comfortable with the software or other aspects of the process.

VETERINARY TECHNICIANS AND ASSISTANTS

Meeting with the technicians and assistants after the first all-team meeting gives them an opportunity to ask questions and gain clarification on the duties they are expected to perform. They should understand how important they are to the client education process, and although not always possible, the goal is for them to obtain client commitment to a plan before the doctor enters the exam room.

Technicians and assistants also need to understand the additional expectations of their position and just how critical these are to the success of the program. These include ensuring reminders are correct and letting the receptionists know when to schedule pets' follow-up appointments. Their key administrative responsibility is communicating with clients to ensure that pets receive all of the services for which they are eligible, and making an effort to get their input on designing this telephone protocol will help ensure their cooperation and commitment to this important task.

KENNEL ATTENDANTS

While it isn't necessary to meet separately with kennel attendants, this will give them the opportunity to ask questions and gain clarification, which they may have been hesitant to do during the all-team meetings. Do not discount the impact they can have on plan acceptance. Kennel attendants can build some of the strongest client and pet bonds in the practice and are already considered trusted advisors by clients that board their pets on a regular basis.

CHAPTER 4: Goals and Incentives

While we know that preventive healthcare plans are naturally appealing to practice team members, offering additional incentives can help to keep the initiative front-and-center in everyone's mind. It will also be seen as an affirmation that practice leaders recognize and appreciate the additional time and effort that the team has committed to making the plans a success.

If the practice has an incentive program, the funds for an employee incentive should be taken out of the patient enrollment fee, and leadership needs to determine the amount prior to discussing it with the staff. While it makes sense for part-time employees to receive a smaller portion of the bonus than those that work full time, it is not recommended that the amount of money an employee receives be related to their position in the practice. Remember, the goal is to increase team cohesiveness and program support, and competitive rewards do not encourage this type of culture.

The simplest way to compensate employees for an earned incentive is to include it as a bonus on the first or second check of the month following the month in which the incentive was earned. A monthly reward generates continued enthusiasm, as opposed to a reward paid on a quarterly or semi-annual basis.

The following is an example of one way to structure an employee incentive program:

> ABC Animal Hospital rolls out their preventive healthcare plans on July 1 and management sets a goal of enrolling 15 patients in the first month. The plans are a huge hit with clients, and at closing on July 31, 25 pets have been enrolled.
>
> When the incentives were introduced to the staff, it was explained that if the pre-determined goal is either met or exceeded, $10 of each enrollment fee would be put aside as a team incentive. However, if the goal was not met, no incentive would be distributed. In this case, the team met and exceeded the goal for July and earned a group incentive of $250 (25 plans x $10).

While enrollment goals are usually more specific with regards to species and plan level, when it comes to team incentives it is best to keep things simple by basing success on total enrollments. Not only does this make it easier for the team to achieve and exceed the goals, it also takes less administrative time to manage. And while goals need to provide a true incentive for employees to participate and go above and beyond, it is counterproductive if they are unachievable.

If goals are not met, the first thing you need to determine is whether they were in fact attainable based on the number of patients seen. The next step is to look at whether the team has been adequately trained or if there is an issue related to a specific position or even certain individuals. Determine the source of the problem as soon as possible so it can be managed quickly and without significantly impacting team morale.

CHAPTER 5: Role Playing

Common Scenarios

The following are some common preventive healthcare plan communication scenarios to be used as a starting point for your own practice. As other scenarios present themselves, these should be added to your preventive healthcare plan communication library for future training.

Use the *Client Communication Flow Charts* as team handouts.

The below scenarios are also provided in the *Client Communication Flow Charts* which should be used for team handouts.

CURRENT CLIENT ON PHONE

When appropriate, current clients that call the practice should be asked by the receptionist 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 work. Offer to mail or email them more information and direct them to your website. If there are active conversations regarding your plans on social media sites, suggest they check these out as well, since there is nothing as persuasive as positive feedback from other pet owners.

Current clients may want to enroll their pets immediately, so it will need to be explained why they must first have their pet fully examined by a veterinarian. Let them know that once the veterinarian gives the green light, they can register their pet and all of the preventive care services performed that day will be covered under the plan.

CURRENT CLIENT IN THE PRACTICE

When current clients bring a pet in for a preventive healthcare appointment, the receptionist should have already informed them about your preventive healthcare plans on the phone when the appointment was made. They may have received a brochure in the mail or gone to your website for more information, but regardless they may have specific questions and the receptionist should initiate a conversation after greeting them and checking them in for their appointment. Some clients may want to begin the enrollment process immediately, which is fine, but they must understand that acceptance will require an examination to confirm their pet's eligibility.

If this is the first time the client has heard about the plans, the receptionist needs to explain what they are, as well as the reason the practice has chosen to offer them. The client should be given a brochure and any other written material to read while waiting for his/her appointment.

The receptionist should document what information was provided in the pet's medical record and verbally notify the technician or assistant about the communication that has taken place and the client's current level of interest. The same process should occur when the technician or assistant preps the veterinarian before they go into the exam room. Even if a client ultimately declines a plan, this should be noted in the record, as should any determination that a pet is permanently or temporarily ineligible for participation.

When clients are in the practice for something other than an appointment (such as to pick up a prescription or food) it is the perfect time to introduce them to your preventive healthcare plans and give them a brochure. Encourage them to schedule an examination for their pet in the next day or two. Again, it is a good practice to document the conversation in the pet's medical record.

One thing that is important to remember is to always ask about other pets in the household, regardless of whether they are overdue for services or have never received care in your practice. If you are offering a multi-pet discount, now is the right time to emphasize these additional savings and the importance of preventive care.

NEW CLIENT ON PHONE

A potential new client or phone shopper 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.abcveterinaryhospital.com. We've been offering these for several months now and our clients and patients absolutely love them!" Tell them about any active conversations regarding your plans on social media sites as well. If an appointment is scheduled, note in the medical record or on the appointment schedule what was discussed and the client's perceived level of interest.

NEW CLIENT IN THE PRACTICE

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 to participate.

Suggested Conversation Starters

Including written scripts in your training materials teaches everyone in the practice to provide a consistent message. The following will help you to get started as you create your own client communication scripts:

- "Preventive Healthcare Plans allow you to provide the best care for your pet throughout the year, and you can pay in small monthly installments that are automatically debited to your checking account or credit card."
- "Preventive healthcare plans are packages of deeply discounted annual preventive care for healthy pets. They also include valuable add-ons, such as complimentary office visits and additional discounts on products and services, for the same price. That means you can bring your pets in any time you have concerns about their health."
- "We have a new way to help our clients keep their pets healthy and manage veterinary costs with preventive healthcare plans. These are annual packages of preventive healthcare services that are discounted and can be paid for in monthly installments. I would be happy to send you more information, and you can also learn more on our website www.abcanimalhospital."
- "Your best option is to enroll your pet in one of our preventive healthcare plans. These include all vaccines plus two examinations, a parasite test, a heartworm test, and even annual blood tests. Our more advanced plan includes an annual dental, and our senior plans include other tests and procedures as well. Because we have made it possible for our clients to pay in

small monthly installments, and offer significant discounts on plan services, the choice is simple!"

- "Without a preventive care plan today's services would cost $ ______, but if your pet is enrolled in a plan, all of these services are included in the package price."
- "Jason at the front desk mentioned you are interest in learning more about our preventive healthcare plans. Let's review the various plans together and determine which would be most beneficial for your pet."

CONCLUSION

While there is no doubt that team training requires extensive preparation and time, the strength of your training program will be reflected in the success of your preventive care plans. Also, education and training improve job satisfaction and encourage a higher level of team work, especially when faced with a universal goal of making it affordable for more clients to provide high-quality veterinary care for their pets. Keep the focus on the pet and the owner, and your team will eagerly meet the challenge you have set out for them.

APPENDIX: Additional Materials

Team Training Presentation

The PowerPoint® presentation (available in the Practice Resources Toolbox in both ppt and pptx formats) can help you introduce preventive healthcare plans to the entire team. It is designed to be customized with specific information for your practice. The goal is to familiarize your staff with the concept and benefits of preventive healthcare plans, while at the same time including details on the specific program you have designed.

Several slides have been left blank so you can fill in your own information:

- **Slide 9:** Puppy and kitten plan details
- **Slide 11:** Adult plan details
- **Slide 13:** Senior plan details
- **Slide 14:** Additional plan benefits and/or discounts
- **Slide 16:** Enrollment fees and plan pricing
- **Slide 21:** Eligibility requirements

Feel free to make any changes that you see fit to make the presentation as specific to your practice as possible.

Suggested speaker comments have been scripted in the **Notes** area underneath the slides in *Normal View*. These can assist with planning the lecture portion of your presentation.

Not only is this an excellent tool when introducing your plans, but it can be used for review throughout the training process. This presentation can also be added to your new employee training program and updated when and if your plans are revised.

Client Communication Scenario Protocols

While the following flow charts do not cover every possible client interaction that can occur, the communcation expectations and processes can easily be adapted to other situations.

CURRENT CLIENT PHONE PROTOCOL

1. Client receives reminder from practice that pet is due for wellness services/vaccines OR
2. Receptionist asks if he/she would like to see Dr. X, the doctor seen last time, schedules appointment, and asks client if he/she has heard about their new preventive healthcare plans
3. Receptionist provides client with details and benefits of plans as well as any specific savings included
4. Client expresses interest in learning more about the plans
5. Receptionist gives website information and offers to mail or email a brochure, explains a veterinarian will need to do exam first and, if deems pet healthy, the client can sign up during the appointment and services will be covered under plan
6. Receptionist notes client's interest level in appointment schedule and emails/mails information to client

POTENTIAL NEW CLIENT PHONE PROTOCOL

1. Potential new client calls practice for information on services and pricing OR comes into practice to get information
2. Receptionist greets the new client and responds to his/her questions by letting him/her know about the practice's new and unique preventive healthcare plans
3. Receptionist provides client with details and benefits of plans as well as any specific savings included
4. Potential new client expresses interest in scheduling appointment as well as learning more about the plans
5. Receptionist schedules appointment and notes client's interest level in appointment schedule
6. Receptionists gives website information and offers to mail/email a brochure, explains a veterinarian will need to do exam first and, if deems pet healthy, the client can sign up during the appointment and services will be covered under plan

CURRENT OR NEW CLIENT AND PET ARRIVE FOR SCHEDULED APPOINTMENT

1. Client and pet arrive for wellness/vaccine appointment
2. Receptionist greets them and sees in appointment schedule that client is interested in enrolling pet in preventive healthcare plan
3. Receptionist ensures client has received information requested and offers to answer any questions prior to appointment
4. Receptionist notes interest level and materials provided in medical record, verbally gives information to technician or assistant when they arrive to bring client into exam room
5. Technician or assistant gets patient history, asks if client has any other questions about plans, and lets client know that if pet is healthy all wellness services done that day will be covered under plan
6. Technician reports client's interest to veterinarian
7. Veterinarian conducts examination, deems pet healthy, and recommends plan best suited for pet
8. Technician or assistant brings client to receptionist and informs them of status, plan chosen, and when to schedule next appointment
9. Receptionist enrolls client in plan and collects enrollment fee, first month's payment, and fees for any other services performed
10. Receptionist highlights savings incurred and schedules patient's next appointment

Roles and Responsibilities Grid

TEAM MEMBER	ROLES	INITIAL TASKS/RESPONSIBILITIES	ONGOING RESPONSIBILITIES
Owner/ Practice Manager	To demonstrate to the practice team and to clients a deep commitment to providing an increased number of pets with optimal veterinary care	• Design plans, training program, and marketing materials • Train team, get input, integrate plan improvement suggestions • Set enrollment goals and track program success • Handle specific administrative situations • Obtain client feedback • "Walk the talk" at all times	• Track KPIs and overall program success • Manage incentive program • Provide ongoing training where needed • Share client feedback with the team • Share success stories with team • Maintain a long-term marketing strategy
Associate Veterinarians	To demonstrate to the practice team and to clients a deep commitment to providing an increased number of pets with optimal veterinary care	• Know all plan components • Educate clients and recommend enrollment • Use tools such as pet health report cards and pet health libraries to educate • Examine pets to confirm eligibility	• Recommend highest level of care at all times • Increase usage of non-preventive care services • Share success stories with team and other clients • Build veterinarian-pet owner partnerships and increase practice loyalty
Receptionists/ Customer Service Representatives	To be enthusiastic plan proponents who introduce and educate clients on plan services and value	• Know all plan components including pricing • Act as first point of contact via phone or in-person • Provide clients with additional information sources • Conduct enrollment process • Schedule appointments • Highlight savings • Remind clients of upcoming appointments	• Continue performing initial responsibilities and improving client communication skills
Technicians and Assistants	To be enthusiastic plan proponents who not only educate clients on plan services and value but obtain clients' enrollment commitment	• Know all plan components including pricing • Act as second point of contact, usually in exam room • Communicate follow-up schedule to receptionist • Conduct client call backs to ensure plan services are redeemed	• Continue performing initial responsibilities and improving client communication skills • Encourage ancillary services • Share success stories with rest of team
Kennel Attendants	To increase awareness of plans among owners of boarding pets	• Know basic plan components • Refer interested clients to receptionists or technicians for more information • Check medical records of boarding pets on preventive healthcare plans for any services due	• Continue performing initial responsibilities and improving client communication skills