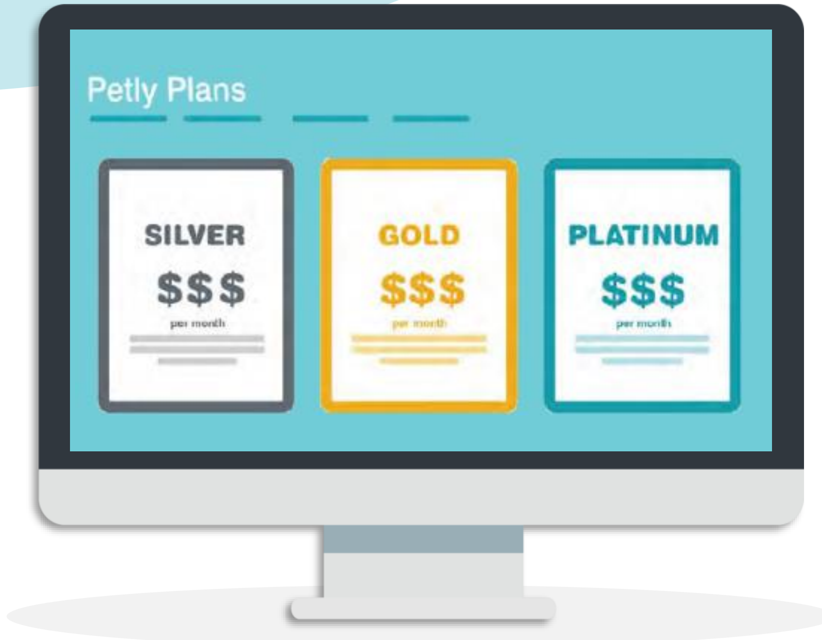
Petly Plans: Guidebook to Managing Your Wellness Program

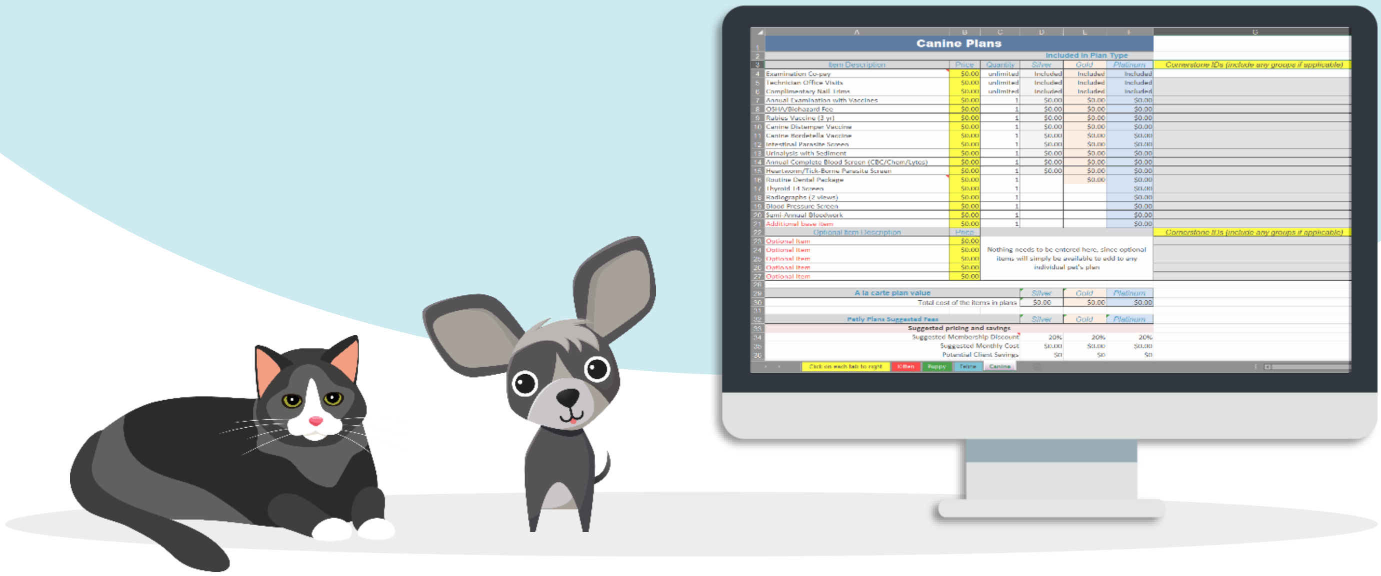


IDEXX Petly™ Plans

Introduction

This guidebook is designed to empower you to manage the key practice areas of your wellness program effectively. We will introduce the concepts of plan development, marketing, workflow, goals and incentives, reports, and renewals and retention in this guide. Best practice tips for before, during, and after the visit will also be listed throughout. Additional resources from the Petly Plans Helpdesk and other sources will be provided at the end. Click on a topic below to be directed toward each corresponding section within the guidebook.

**Note: All teal underlined text in this manual denotes a hyperlink to online resources.*



Plan Development

In this chapter, you will learn to develop plans that reflect your practice's standard of medicine. Once created, your plans will serve as the foundation of your wellness program. We will outline tools to develop your plans, explore membership perks, review plan tiers for all life stages, establish pricing, and incorporate add-on items, in addition to the setup of avian, equine, and employee plans. We'll also provide you with best practice tips along the way.

Assign a Practice Champion

Begin by assigning a practice champion. Your practice champion will partner with the Petly Plans implementation team to oversee setup activities and delegate tasks to other staff members as needed. After your plans are finalized, your practice champion will review them with key decision makers and staff to gain everyone's buy in. A wellness program will only succeed when the *entire team stands behind your plans*.

Tools to Design Your Plans

Your IDEXX implementation team will begin by equipping you with a plan development workbook. The workbook will contain a separate tab for every life stage and species covered, built-in formulas to easily calculate costs, and best practice tips for optimizing your plans. The implementation team will consult with you throughout this process to address questions and provide feedback.

Plan Tiers

Multiple plan tiers make choosing the right plan easy based on each pet's life stage and health status. The default names for each plan are Silver, Gold, and Platinum. These names are easily recognized by pet owners, but you have the flexibility to label them as you desire. Whatever you call your plans, just make sure pet owners understand the progression of services provided with each plan tier.

Puppy and Kitten Plans

Puppy and kitten plans are typically comprised of two tiers, Silver and Gold. Both will have everything needed to protect puppies and kittens against illness and disease in the first year of life. The Silver plans contain preventive care examinations, core vaccines, and diagnostics without a spay or neuter. This will be especially helpful for pets coming from a rescue organization or shelter and have already been spayed or neutered. The Gold tier will contain everything in the Silver, plus the addition of a spay or neuter surgery.

Adult Plans

Adult plans commonly contain three tiers. The first tier, Silver, is your most basic plan. This typically includes an annual preventive care examination, core vaccines, and basic diagnostics to catch early signs of disease and establish a baseline. This may include a heartworm screen or Leukemia/FIV screen, intestinal parasite screen, urinalysis, and a CBC/chemistry/analytes panel. The middle tier, Gold, is your gold standard of care for healthy pets. The Gold plan includes everything in Silver, plus a routine preventive dental. Finally, the highest tier, Platinum, is your most comprehensive care. It can be geared toward senior pets or for the pet owner who wants the most complete package for their pet, including advanced bloodwork, preventive radiographs, and a blood and eye pressure screen.

Membership Perks Incentivize Enrollments

The addition of membership perks will make enrolling in a wellness plan more enticing and provide benefits above and beyond routine preventive care. Below, we've documented the most popular perks among practices, along with their benefits.

Co-pay Exam

What Is A Co-Pay Exam?

Co-pay exams, sometimes called membership exams, are discounted exams pet owners pay for out of pocket at the time of their appointment. These are intended to be used for any additional visits needed outside of their preventive care needs. It's a powerful perk used to lower the financial barrier of pet owners visiting your practice or waiting to schedule a visit until their pet is very ill. These discounted exams have been shown to help patients receive care faster and increase spending beyond the exam. Co-pay exams can generate additional revenue for your practice.

How Many Co-Pays Should Be Included in A Plan?

The best practice recommendation is to have an unlimited quantity of co-pay exams in each plan tier. Along with reducing barriers to bringing pets into your practice in a timely manner, the savings incentivizes pet owners to enroll in plans.

How Do I Price My Co-Pay?

The suggested co-pay exam cost should be anywhere from $10-$20, or 30-50% off your regular examination fee. Studies have shown that pet owners spend more on items outside of the plan during a co-pay visit, because the visit was discounted.

Best Practice Tip: The Petly Plans software will allow you to set a True Value for the co-pay exam, or any other wellness plan service item that might be discounted. In the case of the co-pay exam, the True Value is the difference between the retail price of the exam and what the pet owner will pay out of pocket. This is beneficial if a pet owner cancels their plan before the plan term expires. The software can charge the difference owed, since the pet owner is no longer eligible for this membership perk with early cancellation. Click here to learn more about editing wellness plan items in the Petly Plans software.

Complimentary Nail Trims

What Is A Complimentary Nail Trim?

These are routine, no-cost nail trims for pets who do not require sedation. Any nail trim that would require sedation or additional restraint would typically be subject to additional out of pocket fees. Nail trims are another great way to ensure the patient visits your practice on a routine basis. This perk is very desirable to pet owners and could be the deciding factor to enroll their pet in a plan. Pet owners will often purchase additional retail items or services outside of the plan during a nail trim visit.

How Many Nail Trims Should I Include in My Plans?

The best practice recommendation is to offer an unlimited quantity of nail trims in each plan tier. This allows pets to be seen based on nail growth. While unlimited nail trims are ideal, plans *could* also have a set quantity. For example, you could cap the quantity at 6-12 nail trims per year, so pet owners stop by up to once monthly. While they're in the practice, they can pick up their pet's heartworm and flea/tick prevention.

Technician Office Visits

What Is A Technician Office Visit?

A tech office visit is a visit with a veterinary technician that does not require the services of a veterinarian. Services that can be performed during a tech office visit may include nail trims, anal glad expressions, routine injections, administering medications, and minor grooming help.

How Many Technician Office Visits Should I Include in My Plans?

The best practice recommendation is to offer an unlimited quantity of visits within each plan tier. This can help free up the doctor's time. While offering unlimited tech visits is ideal, the quantity of visits also could be limited to 6-12 annually. This will allow the pet to be seen up to once a month.

How Do I Price My Technician Office Visit?

We suggest you offer this as a complimentary perk within the plan. This will incentivize pet owners to visit more often.

Plan Pricing

The best plan pricing is the amount both you AND your clients find appropriate and fair. You should consider pricing from both perspectives. Is this an appealing price to a pet owner based on the plan coverage and dollar value? Is the price equitable for the level of services provided and your operating costs? Remember, consumers tend to spend more when they feel like they're saving. Since clients aren't paying for their annual visit, in one lump sum, they'll often be willing to purchase other products and services you've recommended. The Petly Plans implementation team can also offer you guidance on pricing as you develop your plans.

Best Practice Tip: Not sure if your prices are comparable or a fair market value for your area? Browse the web for other practice's plans in your region for reference. Monthly plan pricing can have a normal range depending on local demographic, the cost of living in your area, or the types of services offered in plans.

Best Practice Tip: Ask your clients what they might pay for a monthly plan as a guideline. Send a survey link in a newsletter requesting their feedback.

Discounts

Plan Item Discounts

The best practice recommendation is to discount all services included in the plan by 5-25%. The most typical amount is 20% off the total a la carte cost of services. That figure can be rounded to the nearest dollar to make it easy for staff and clients to remember. Your implementation specialist can review the plan workbook with you to ensure you're on the right track.

Non-Plan Item Discounts

The best practice recommendation is to discount services and products not covered by the plan by 5% for your entry tier and by 10% for your middle and upper tier. Some practices choose to discount everything outside of the plan, just preventives, or everything but items that have a lower profit margin (food, supplements, retail). Be sure to add a note in your plan restrictions explaining which items are or are not subject to a discount, so your pet owners are aware.

Initial Membership Fee

We recommend charging an initial membership fee of $99.00 for each new plan. This helps pet owners feel like they've invested in a membership at your practice. This will give them access to all the membership perks included in your plans and the flexibility of paying for services over 12 months. Some practices choose to decrease this fee based on their surrounding market and demographic to make sure it's not a deterrent to enrolling. The fee is paid at the time of initial enrollment and *is not charged again* when the plan renews the next year. Remember, IDEXX collects an administrative fee for each newly enrolled plan.

Multi-Pet Discount

A multi-pet discount applies to the initial membership fee of any subsequently enrolled pets as an added savings and incentive for enrolling multiple pets within a household. Most practices set the multi-pet discount to $20.00. For example, a pet owner pays a $99.00 initial enrollment for the first pet, and $79.00 for every pet thereafter.

Optional Add-On Items

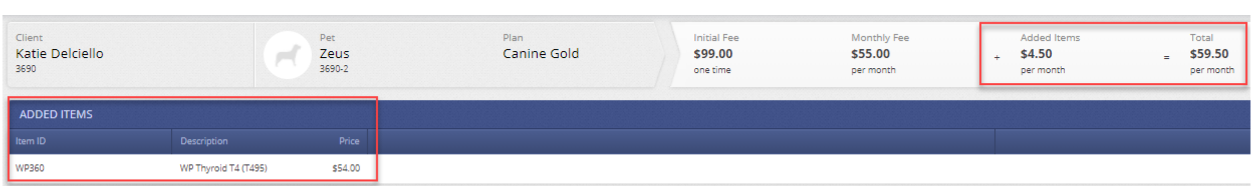
An add-on item is a service or inventory item you're allowing your pet owner to finance within their plan at regular price. Offering add-on items is a great way to make your plans highly customizable to each pet's medical needs, provide additional financial flexibility for the pet owner, and increase the overall profitability of your wellness plan program.

Feline and Canine Add-On Examples

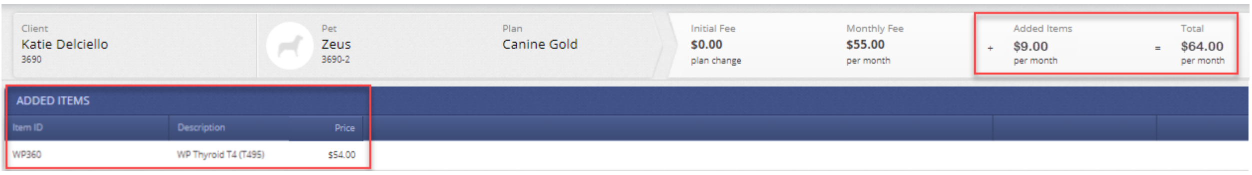
- Advanced diagnostics
- Therapeutic drug monitoring
- Gastropexy
- Hernia surgery
- Deciduous teeth removal
- Dewclaw removal
- Flea, tick, and heartworm medications
- Lifestyle vaccines
- Boarding, grooming, and retail items
- Any other items not covered by your plans

How Do Add-On Items Work?

Add-on items can be added to a plan at any time. For example, a thyroid screen is added to the plan at the time of enrollment. The monthly plan payment would increase by the dollar value of the thyroid screen spread across 12 months. Notice how the $54.00 diagnostic is equally divided into the 12 monthly payments.



Add-on items can also be added mid-plan. For example, the same thyroid screen is added 6 months into the year. The software automatically divides the cost of the item into the remaining 6 payments. Notice how $54.00 is equally divided into the 6 monthly payments.

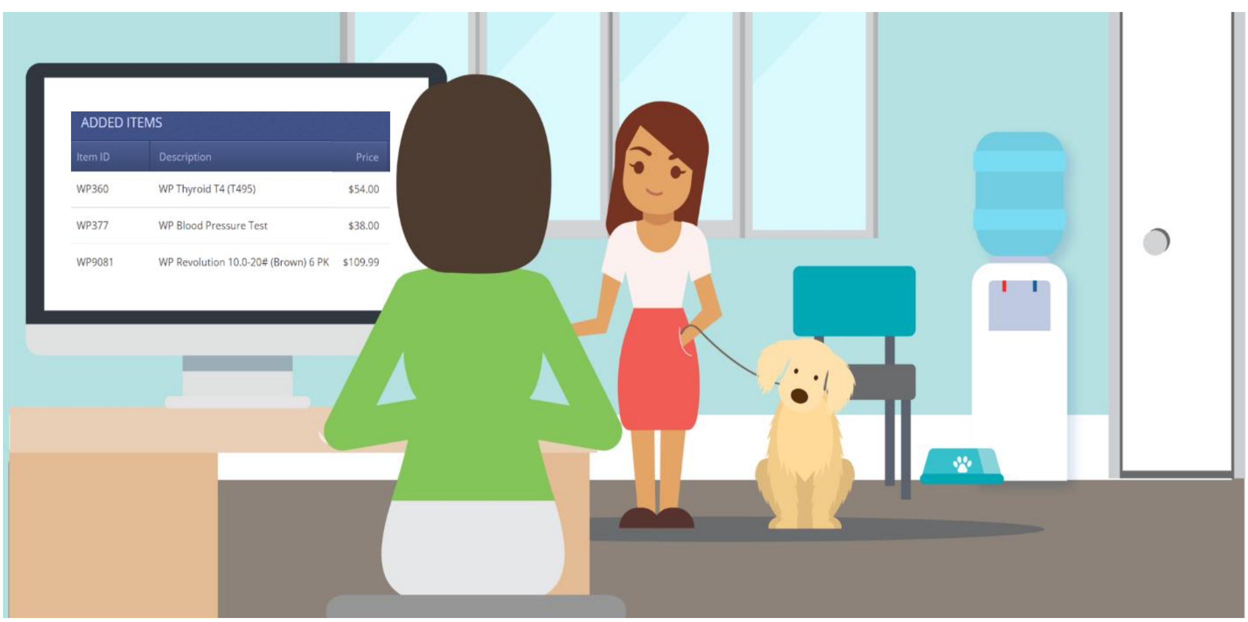


Add-On Items Case Study

A recent case study illustrated the profitability of plan programs that included a wide variety of optional add-on items. The study reviewed two separate veterinary practice groups each with 4-6 practices. One practice group in the southeast offered add-on items, the other group in a western state did not. Both groups are managing about 1,400 plans across multiple locations. Reviewing monthly average and annual total wellness plan payments led to a surprising discovery. The practice group offering a comprehensive array of optional add-on items recognized far greater income with their wellness plan program. Do not underestimate the value of customizing your plans with options!

Practices Offering Add-On's	
Monthly Payment Average	$78,135.86
Annual Payment Total	$937,360.32

Practices Not Offering Add-On's	
Monthly Payment Average	$52,214.40
Annual Payment Total	$626,572.80



Other Plan Types

Employee Plans

Staff with pets can also benefit from being enrolled in a wellness plan. Consider reducing or removing the initial enrollment fee and discounting the monthly plan fee at a greater amount for staff member's pets. For example, if you charge employees 50% off your markup cost, design your employee plans with a 50% discount on the monthly plan fee. Consult with your local tax professional to ensure employee discounts are compliant with tax laws in your jurisdiction. Employees with pets on plans can better understand and more clearly explain the benefits of wellness plans to your clients.

Avian Plans

Petly Plans is not just for cats and dogs! The software will empower you to provide best care of our feathered friends as well. Take advantage of this and build plans for birds. Include services such as preventive care examinations, fecal exams, bloodwork, sexing, beak and nail care, and radiographs as plan items and optional add on items. Ask your implementation specialist for guidance on this and other best practices on building your bird plans.

Equine Plans

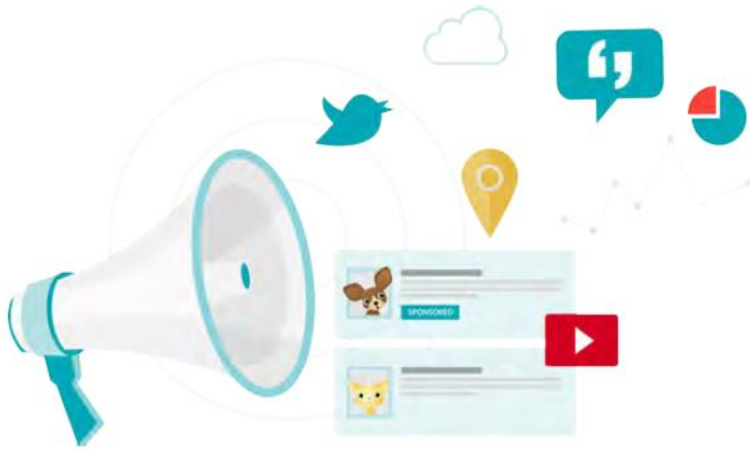
Petly Plans can also empower you to provide preventive care services for horses. Consider adding diagnostics and membership perks such as preventive care exams, core vaccines, McMasters or other fecal exams, bloodwork, farm or house calls, Coggins testing, teeth float packages, farrier care, and others. Ask your implementation specialist for guidance on other best practices for your equine clients.

Marketing

An effective wellness plan marketing strategy helps staff and pet owners understand the value of preventive care, improves retention, generates awareness of your plan options, builds clientele, and boosts plan enrollments. This section focuses on ways in which you can market your plans before, during, and after a pet owner visits your practice. We will discuss opportunities to highlight your plans inside the practice through printed media, in person, over the phone, and through external channels like social media, newsletters, and your website, along with providing best practice tips! While the ideas presented in this section are a comprehensive compilation of marketing strategies, each veterinary practice can decide which tactics make the best sense for their branding, business model, and communication style.

Unifying Your Team

As with developing plans, assigning a practice champion to oversee your marketing efforts is the first step in ensuring your messaging will be consistent over time. Your practice champion should have at least one other staff member helping with long-term marketing tasks as *"many hands make light work."*



Before the Visit:

Curbside Marketing

Display signage to alert clients of your plan offerings *before they enter the practice!* The Petly Plans marketing website offers a wide variety of customizable options, including banners, lawn signs, parking signs, sandwich boards, posters, and window clings to ensure messaging about your plans is consistent, both inside and outside of the facility.

On-Hold Phone Messaging

Create an on-hold message about your wellness plan program to spread awareness of your plan offerings before a client care representative answers the phone! Keep your messaging simple, yet informative, and include a call-to-action. For example, *"Annual exams and vaccines are an important part of keeping your pet healthy and happy. Did you know our practice offers wellness plans? Wellness plans are a membership program that provides your pet with all their needs – all with easy monthly payments. Ask us about our wellness plans when we are back on the line!"*

Live Phone Interactions

Mention your plans when clients call. Have a script with talking points next to the phone as staff learn to navigate these conversations. Mention wellness plan options when a pet owner schedules a new puppy or kitten visit, wellness or vaccine appointment, dental visit, or spay and neuter surgery. Draw inspiration from the Petly Plans staff scripts by role-playing these scenarios in meetings to ensure staff feel comfortable.

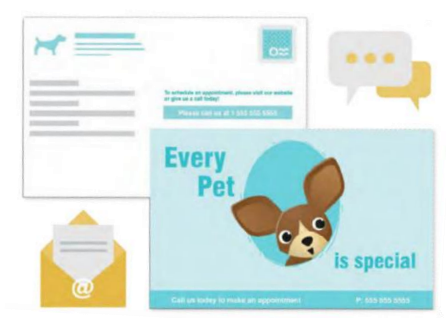
Email Your Brochure

Email a digital version of your brochure. Create an email template or custom correspondence to save time.

Call-to-Action Messaging

- Add call-to-action messaging to invoices and estimates. Click the links for step-by-step instructions for Cornerstone or AVImark systems. For example: *"Did your pet receive services today that could have been covered with a preventive care plan? Ask us which plan is right for your furry family member!"*

- Add call-to-action messaging to your outgoing communications such as medical and appointment reminders and other correspondences from your client communication software. Be sure to include a snippet in texts, emails, and postcards.



Practice Website

Use your practice's website as an educational resource to help you get discovered online and to save time. Drive traffic to the site through newsletter and social media posts, brochures, daily interactions, and using Search Engine Optimization (SEO). Keep the following ideas in mind when designing your website pages:

- Use our Petly Plans mock website as a template for content and verbiage when designing your site. Post up-to-date images of your plan services and pricing, or prompt pet owners to call for pricing. Don't have plan services in a chart on your website? Get in touch with your Petly Plans team for info on obtaining design help!

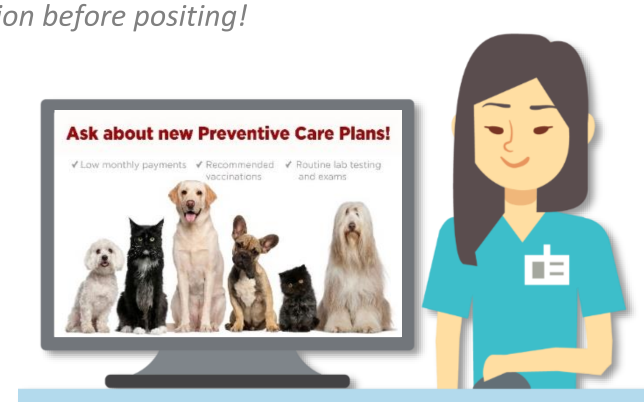
- Post images on your pages that are specific to wellness plans. Click this link to download and share royalty and copyright free images to your site, newsletters, and social media posts featuring puppies, kittens, senior pets, dental month content, flea and tick prevention, and so much more!

- Educate pet owners about the importance of wellness plans by listing frequently asked questions. Differentiate wellness plans from insurance! List their primary benefits so pet owners can read about them before the visit. Use and adapt our FAQ's from the Petly Plans Helpdesk and post on your site.

- Use SEO to help pet owners find your practice! Embedding SEO keywords on site images like: "*Wellness plans, preventive care, wellness plans in X city, wellness plans in X state/county/local jurisdiction*" and other targeted keywords can help pet owners shopping for practices with wellness plans find you online.

Best Practice Tip: Link a pre-enrollment form on your site to expedite the enrollment process. Instruct your clients to complete and return the form prior to their appointment. Don't have a form to post on your site? Download and adapt ours from the Petly Plans Helpdesk.

Best Practice Tip: Dedicate an area or a page of your website to pet owner testimonials with pet photos. Ask your most devoted plan-holders for their thoughts about your plans. Be sure to post comments that tout the ease of financing monthly payments, and other plan perks. *Don't forget to obtain permission before positing!*



During the Visit

Check In

- Ensure printed materials, such as posters and floor decals are visible to spread the word and create awareness about your plans.

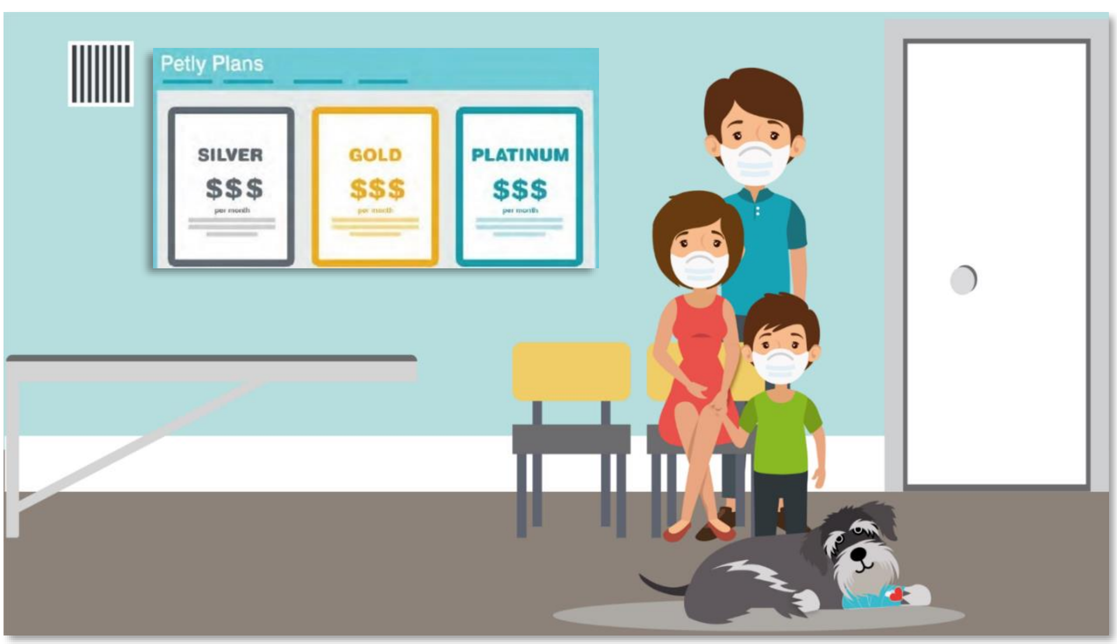
- Give a brochure or flyer to your client. Staple it to an invoice, estimate, or include it with a receipt for retail purchases.

- Display a wellness plan slide deck on a television screen, tablet, iPad, or other device in your practice. Click the link to download and use the slides from the Petly Plans Helpdesk. *The slides are set to a loop so you can hit play and walk away!*

Check Out

- Provide canned estimates comparing plan verses non-plan pricing for the visit or for future recommended services. For example, during the exam, the doctor recommends a dental. Provide the pet owner with an estimate showing the cost of the dental paid out-of-pocket verses enrolling in a wellness plan that day, which includes the dental as part of the monthly payments. This will illustrate member savings and benefits. Attach a copy of your brochure or flyer to the invoice or estimate to reinforce your messaging.

Best Practice Tip: Provide staff with wearable items to promote your plans. Pins, scrub tops, tee-shirts, stickers, and other fun swag items can help spread the word! Click here to order customizable marketing materials. Want a specific item printed with your plan options, but don't see it available on the Petly Plans website? Submit your idea to a Petly Plans team member.



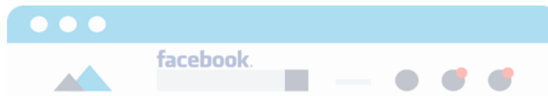
After the Visit

- Appointment Follow Up

  Send a follow up text, email, or survey you've prepared ahead of time or call any pet owner who was offered a plan but did not opt in during the appointment. Be sure to include a digital copy of your brochure if one was not already provided. Some pet owners will want to discuss this decision with significant others before committing.

Best Practice Tip: Pet parents love seeing photos of their fur babies displayed within your practice as well as on social media! Create a pet photo wall in your waiting area or in an exam room displaying pets who've been enrolled in plans.

Digital Media Campaigns



- Social Media

  Engage your clients on social media platforms with the widest reach and the deepest multimedia engagement. Most businesses and individuals can be found on Facebook. Use Facebook to create excitement amongst pet owners. Don't forget to keep each post simple and include a call-to-action. Be sure to follow these best practice tips for all your ongoing social media posts!

  - Attach a photo in each post about your wellness plans. Click the following link to download digital banners and images from the Petly Plans Helpdesk.

  - The Helpdesk contains text along with image content for senior month, dental month, and puppy, kitten, and flea and tick season, and more. Click the link to review and post images and text to your social media accounts.

  - Be sure to post about your plans with a regular cadence. Once or twice a week should be appropriate depending on the frequency of your regular posts. Remember, ongoing consistency is key to keep existing, returning, and new pet owners aware of your plans.

  Best Practice Tip: Facebook allows you to schedule your posts at pre-determined times. This eliminates effort when you're too busy to post in real time. Click the following links for text and images for your pre-launch, launch day, and ongoing posts!

  Best Practice Tip: Post images of patients on plans along with a fun quote or testimonial to create engagement. Remember to request permission from pet parents before sharing.

  Best Practice Tip: Review this 6-minute training video for additional information on engaging and education pet owners on social media. Use the link to sign up for a free newsletter and receive stories and tips from peers and industry experts.

Email Newsletters

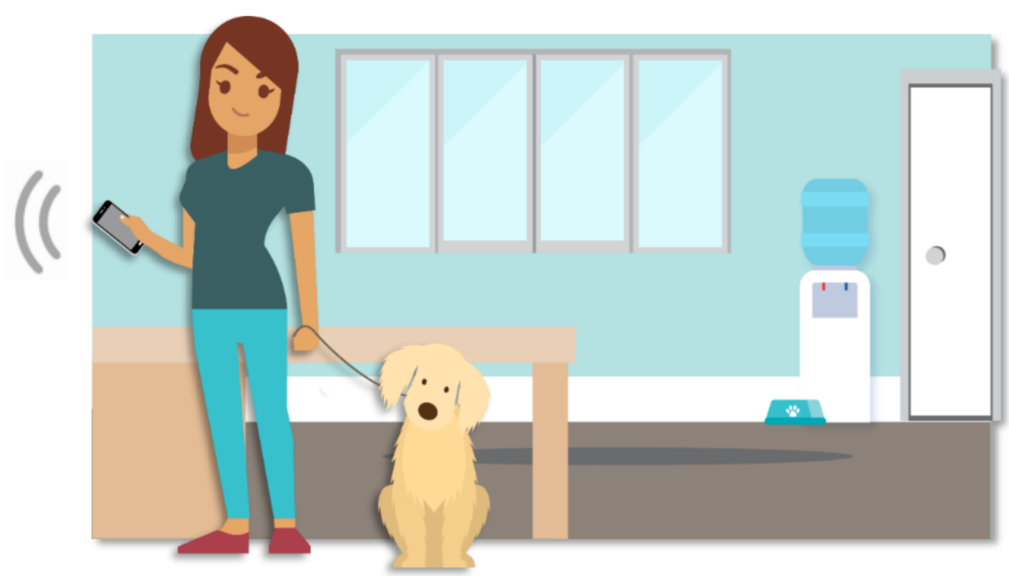
Inform and educate pet owners about plan options, preventive care, and other important events at your practice on a routine basis. Follow our best practices below to help inspire your audience and ensure your message gets read:

- Images and text for posts are available for download from the Petly Plans Helpdesk.
- Send information about your plans in a pre-launch newsletter announcing your upcoming plan launch, on launch day, and in ongoing posts. Dedicate an entire post to your plans or include a section in your regular newsletter with pertinent updates about the practice.
- Target clients by their pet's age, breed, species, or the date of their last visit to keep content relatable and personalized.
- Include a clear call-to-action for pet owners to call, email, or visit your website for more information.
- Use your newsletter to collect targeted feedback when it is needed. Ask for readers to respond to questions in writing or include links to an online survey to aggregate results. Remind readers their input is invaluable to encourage a response.
- Craft an email subject line that is succinct, specific, and entices pet parents to read your email. Use selective capitalization and special characters to help prevent your newsletter from getting trapped by spam or junk filters.
- Be sure to input every client email address in your database for maximum reach. Add a line on your patient admission paperwork to boost email capture rate. Run reports in your practice information management software to track your progress with capturing emails. Routinely screen email address formats for accuracy, ensuring opportunities to communicate with your pet owners.
- Continually educate pet parents about your plan offerings, the importance of preventive care, wellness visits, routine dental visits, spay and neuter procedures, and flea, tick, and heartworm prevention. Visit the Pet Health Network for hyperlinks to use in newsletters, social media posts, and website content.

Push Notifications and Text Message Campaigns

Client communication platforms and mobile applications allow you to send targeted text message campaigns and push notifications to an app. Expand your reach to tech-savvy demographics and engage your audience quickly! While text messages have a very high open rate, and are read within minutes, be sure to follow the guidelines below to ensure your text and app outreaches are personal, actionable, and well received.

- Include a call-to-action in your messaging. Instruct users to call or email the practice or visit your website for more information.
- Be cognizant of the time of day and time zones when sending these campaigns.
- Be engaging! Tell a story, make a joke or pun, and don't shy away from photos and emojis.
- Make your content personal and individualized. Some text marketing campaigns allow you to incorporate custom fields, such as the pet owner or pet name. Send alerts based on a pet's age, breed, species, or other criteria, where appropriate.
- You may need to obtain your audience's express consent before sending a mass text message campaign or alert. Research the communication laws of your local jurisdiction or consult a legal expert for more information.
- Pique your reader's curiosity and keep your audience engaged by only providing pertinent updates. Alerting clients when your practice is launching plans, improving plan services, and sending other info can be helpful. The use of text message campaigns and push notifications, however, should be employed less frequently than email newsletters to avoid the user from unsubscribing or turning off notifications.



Print Media Campaigns

- Direct Mail

  Direct mail marketing and the use of custom messaging are highly effective ways to acquire and retain clients and spread the word about your wellness plans. This is especially true for your pet owner demographic that may not have an email or cell phone number to share. Read on for tips and best practices on ensuring your postcards and mailed collateral reach your pet parents and drive results.

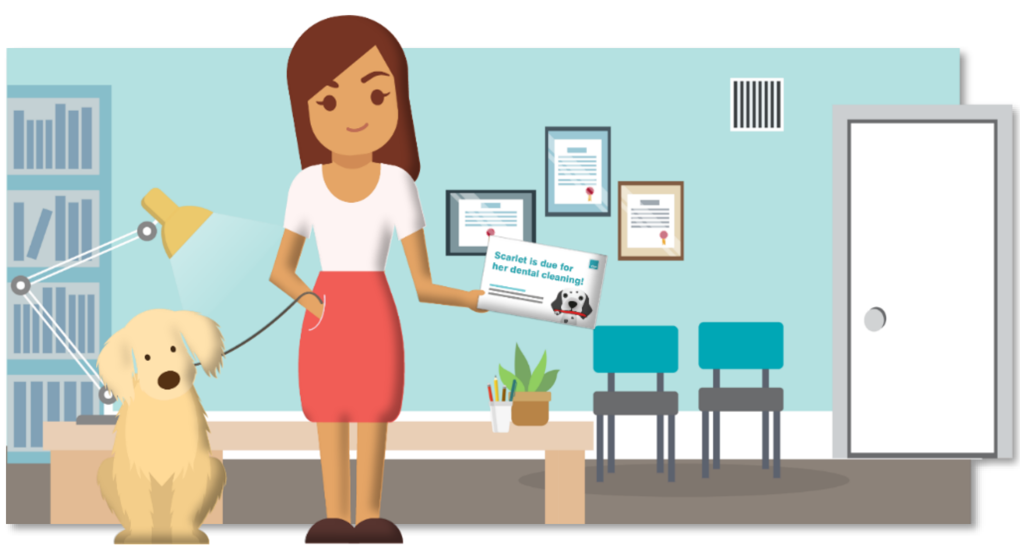
  - Include a clear call-to-action to drive clients to your website, or to call, text, or email your practice for more information about your plans. Use a QR code to link to your website!

  - Does your client communication tool send medical reminder postcards? Be sure to include a custom message about your wellness plan offerings so pet owners are aware their upcoming vaccines, dentals, wellness visits, or other services could be covered by enrolling in a wellness plan.

  - Keep your content as personal as possible. Use custom fields to add the pet owner or pet's name. Send postcards with images that are age, breed, or species specific, or that feature the pet's actual photo where possible to capture your pet owner's attention.

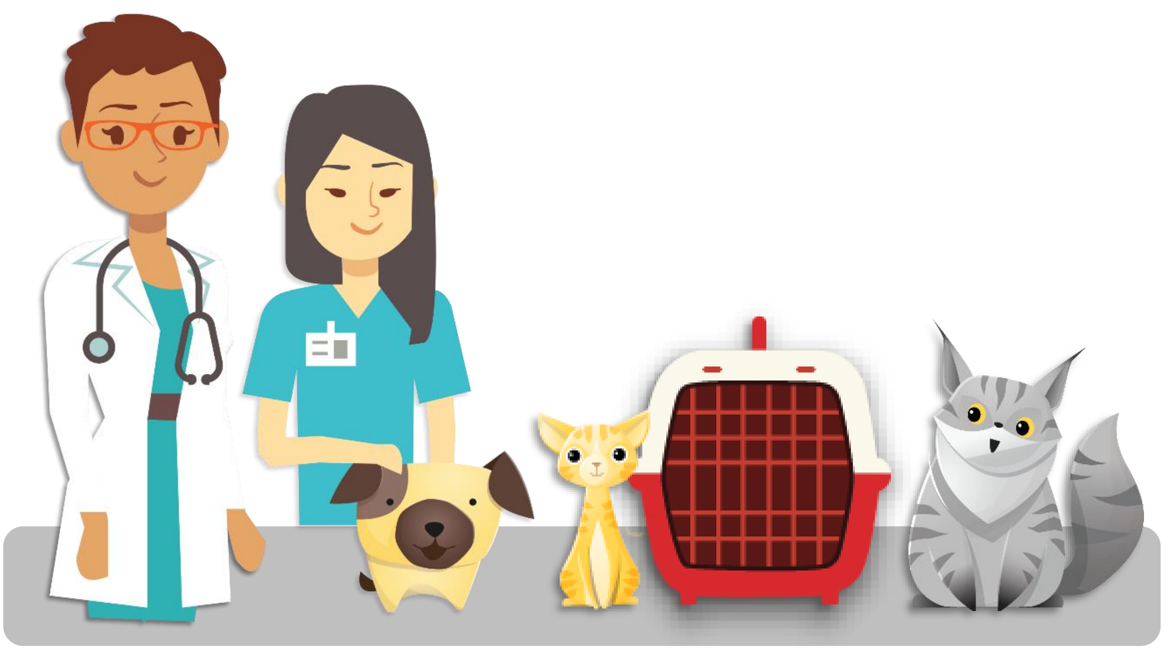
  - Routinely review your client address list in your practice information management software and screen your individual mailing lists. Be sure your staff are capturing and inputting pet owner addresses at every opportunity. Correct any addresses with incorrect formats or that contain impartial information to optimize your campaign's effectiveness.

  Best Practice Tip: Direct mail services often sell mailing lists directly to consumers. Send a postcard to people who've just moved to your area to target and acquire new clients and boost enrollments.



Workflow

Building a well-defined plan enrollment workflow is key to the success of your wellness plan program. Defining and delegating individual responsibilities before, during, and after a visit will create the sense of accountability necessary to unify your team and achieve enrollment goals. In this chapter we'll discuss the ways in which staff roles impact workflow, optimizing each stage of a visit for plan enrollments, using technology and marketing for efficiency, and making preventive care discussions a part of ongoing staff meetings.



How do Staff Roles Impact Workflow?

Every practice is unique in size, structure, demographic, and approach to medicine. Below, we've outlined roles commonly found in all types of veterinary practices. We've also included examples of duties that individual staff members may perform. You can adapt these suggestions as needed and adjust your process until you develop the rhythm that works best. We've also included recommendations for curbside, and hybrid service models. One thing remains true for *all* practices – *each individual staff member will play an integral part in the success of your wellness program.*

Client Services

Front desk staff are critical to the success of your wellness plans as the first point of contact between pet owners and your business. From booking appointments, checking clients in and out and managing the flow of client-facing correspondence, they interact with pet owners and staff to ensure that operations run smoothly.

Veterinary Technicians

Technicians play a key role in educating your clients about their options. As front-line workers, they face the challenge of helping pet owners recognize the importance of providing yearly diagnostics, vaccinations, regular heartworm, flea and tick medication, preventive dental treatments and other services.

Managers/Administrators

Managers and administrators oversee the day-to-day workflow of practice staff. They will also ensure that all employees are trained on the usage of Petly Plans software and are comfortable discussing plans with pet owners.

Veterinarians

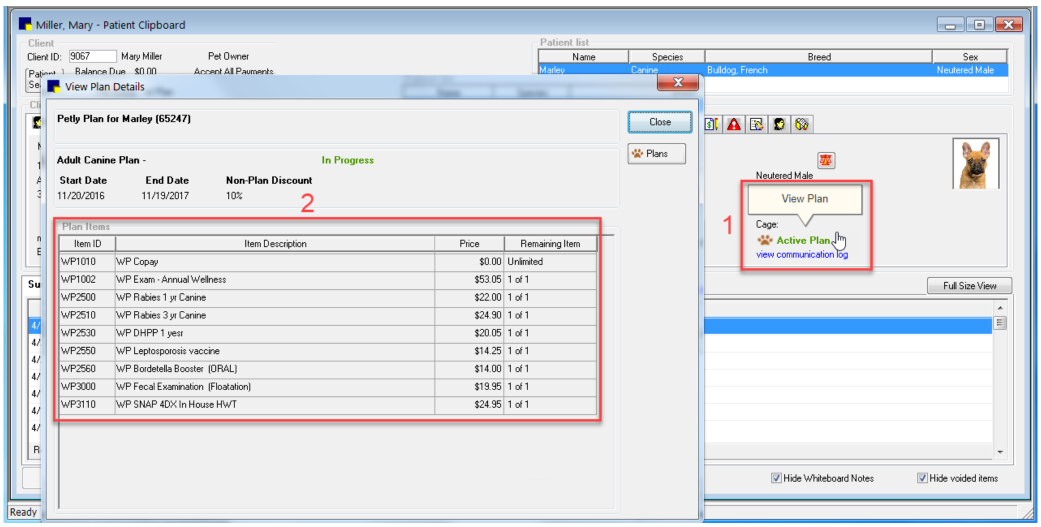
Doctors play an essential role in educating pet owners on best medicine. They are responsible for working with managers and administrators to communicate the practice's business objectives and mission to the staff. Doctors also lead by example by discussing the practice's wellness plan offerings and benefits daily.

Making Plan Enrollments a Part of Your Workflow

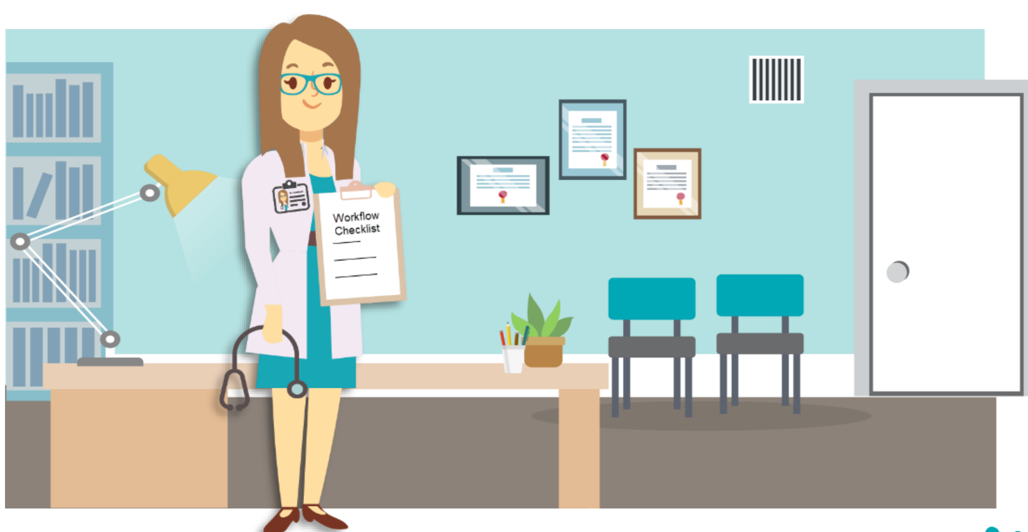
The key to your success will be making sure your entire team is working in unison toward a common goal. To accomplish this, all staff must promote plans daily. In this next section are a list of activities we suggest your staff members perform before, during, and after each visit.

Before the Visit:

- ## Identifying Opportunities to Enroll New Plans
  - Review the appointment scheduler each day. Highlight any plan enrollment opportunities using a dedicated color, symbol, or phrase. Opportunities for discussing plan offerings include new puppy/kitten visits, spays/neuters, well visits, dentals and even some sick visits, and chronic cases *If an upcoming appointment is for a pet already enrolled in a plan, be sure to review remaining wellness plan items and make these a part of the visit. To view unused plan items in Cornerstone 8.6 or greater, start from the Patient Clipboard, click the Active Plan paw print and the View Plan Details window for more information.*



  - Track your enrollment opportunities on a white board. Visit [this link on the Helpdesk]() and take inspiration from A Animal Clinic's enrollment board.

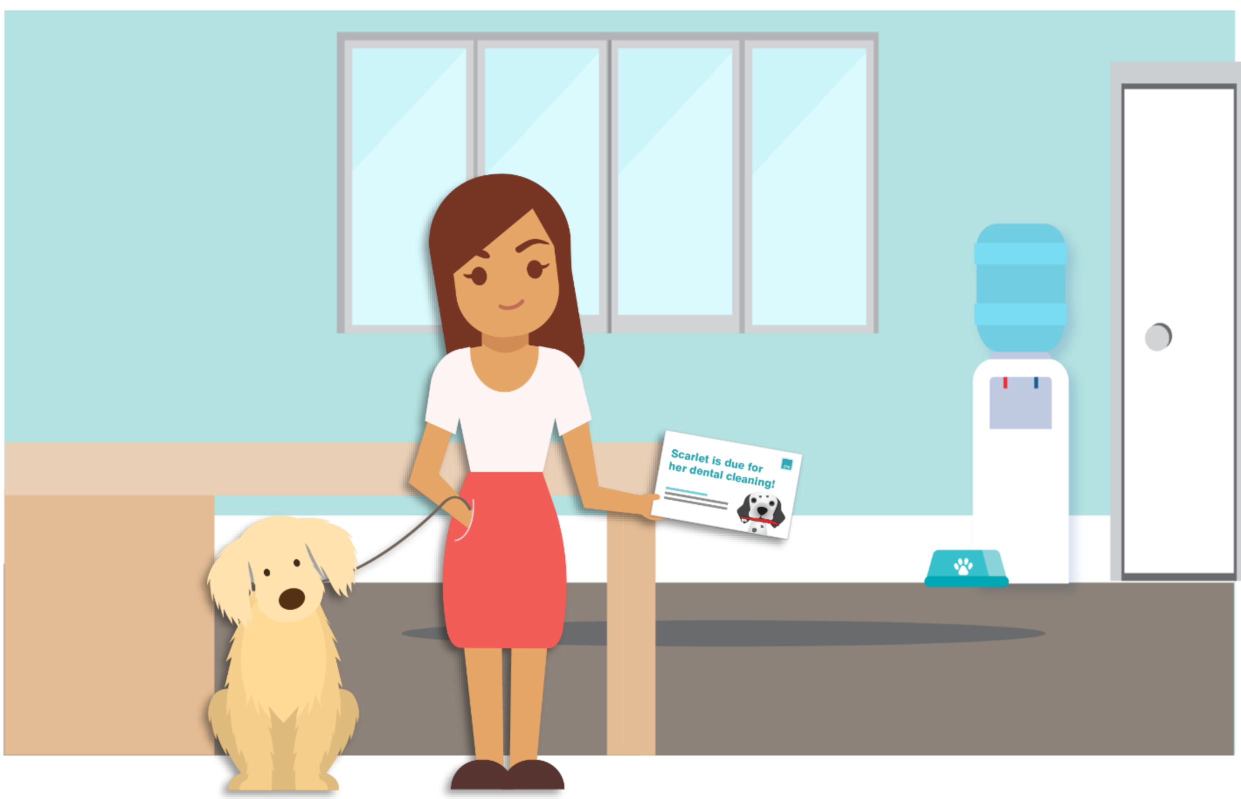


Booking Appointments

- Mention wellness plans when booking appointments. Have a brief statement ready, asking pet owners if they are aware that wellness plans are available. Print this statement and keep it handy next to any front desk workstations, until talking about plans becomes second nature. Check out the staff script section of the Petly Plans Helpdesk to get started.
- Create a reason for visit or appointment type on your scheduler denoting when an appointment is a potential a plan enrollment opportunity.
- Include a link to the plan section of your website in email and text communications.
- Send a digital version of the brochure to the owner as an email or custom correspondence. Create these in advance to save time.

Custom Messaging

- Add custom messaging to your invoices and estimates (AVImark and Cornerstone) explaining that services rendered could be covered in a wellness plan.
- Add custom messaging to your appointment reminders and medical reminder postcards, emails, texts (client communications software) to reinforce that plans are available.
- Add on-hold phone messaging regarding your wellness plans so pet owners are aware of your plan offerings, even before speaking to front end staff.



During the Visit:

Check-In

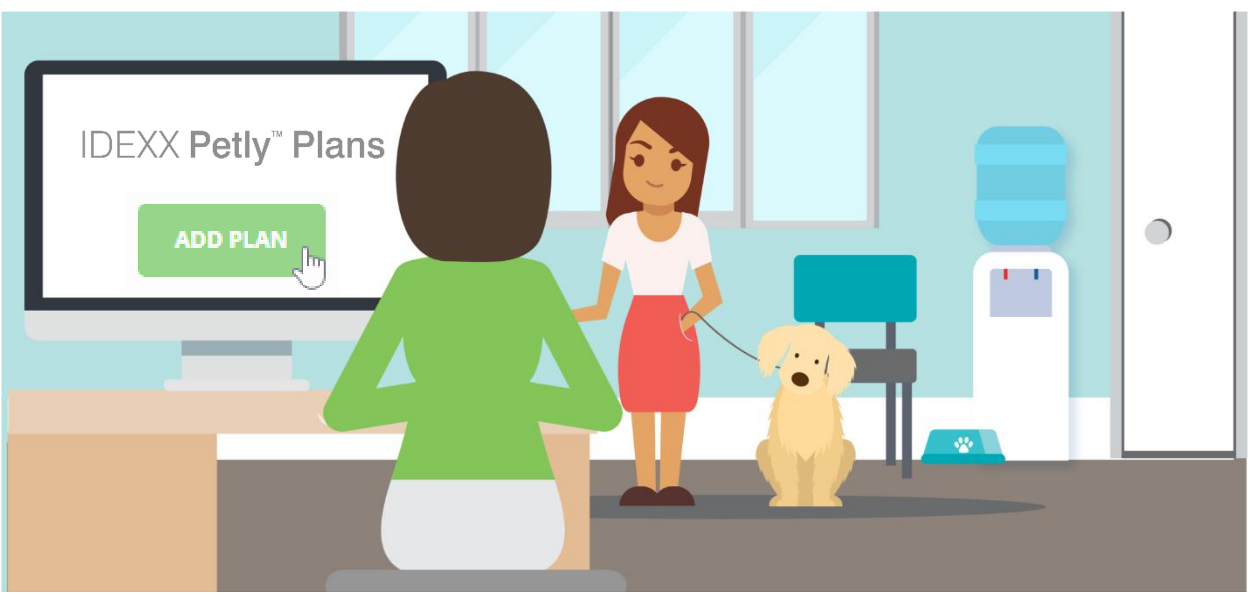
- Getting the client and the patient settled into the waiting area or exam room is an opportunity to provide a brochure (printed or digital). The pet owner may even have questions regarding plan offerings and pricing before the doctor performs the exam.
- Laminate copies of your brochures, along with sample estimates that can easily be sanitized between uses.

Recommending a Plan

- Review the patient history to discover declined services that could be included in a plan and prepare to discuss their importance. Note whether the pet needs services like exams, vaccines, diagnostics, a spay or neuter, a dental, or other products and services that could be covered within a plan. Recommend a plan tier based on the pet's life stage and individual needs to allow you to practice best medicine.
- Discuss membership perks like financing recommended care with 12 monthly payments, co-pay exams, plan item and non-plan item discounts, nail trims, optional add-on items, and all other benefits you offer within your plan program.
- Make sure your reception staff, technicians, and veterinarians are all aligned with your plan recommendation to ensure consistent messaging.
- Make a note regarding your plan recommendation in the patient file or paper file.

Plan Enrollment

- If the pet owner decides to enroll in a plan, conduct the enrollment that day to allow them to utilize services during their appointment.
- Display photos of pets who have enrolled in plans on a wall in your practice or on social media. Pet owners love seeing their pets proudly displayed for all to see.



Check-Out

- ☐ Provide canned estimates prepared ahead of time comparing plan vs. non-plan pricing for the visit or for future recommended services. For example, during an exam, the doctor recommends that the client schedule a dental. Provide the pet owner with an estimate, showing the cost of the dental to be paid out-of-pocket, vs. enrolling in a wellness plan that day, which included the dental as part of the monthly payments. This will illustrate member savings and benefits. Attach a copy of your brochure or flyer to the invoice or estimate to reinforce your messaging.

Best Practice Tip: Add a check box or sticker to your patient admission paperwork for clients to indicate they're interested in plans. Make a notation in the pet owner file in your practice information management software to highlight upcoming plan enrollment opportunities *and* when they have been discussed.

Best Practice Tip: Place a color-coded flag or door hanger on the exam room door *or* color code the patient record to alert the technician or veterinarian to talk about plans.

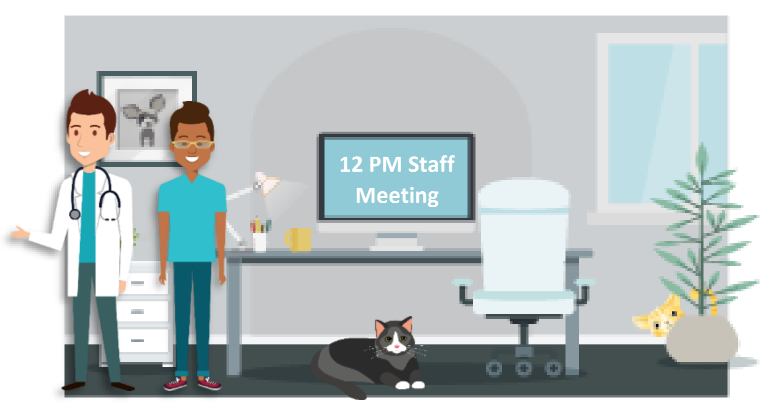
Best Practice Tip: Are you performing curbside visits? Utilize technology to your advantage by providing pet owners devices with video conferencing so they can view the exam as it takes place. Live broadcasts streamline communications between practice staff and pet owner and save you time.

After the Visit:

- ☐ **Appointment Follow Up**
  Send a follow up text or email you've prepared ahead of time or call any pet owner who was offered a plan but did not opt in during their appointment. Some pet owners will want to discuss this decision with significant others before committing.

Making Wellness Plans a Regular Part of Staff Meetings

Staff meetings are an excellent opportunity to review your plan enrollment workflow and identify opportunities to adapt your process. Compile a list of questions or concerns ahead of time to review. Use this time to discuss any challenges your staff members are experiencing and brainstorm solutions together.

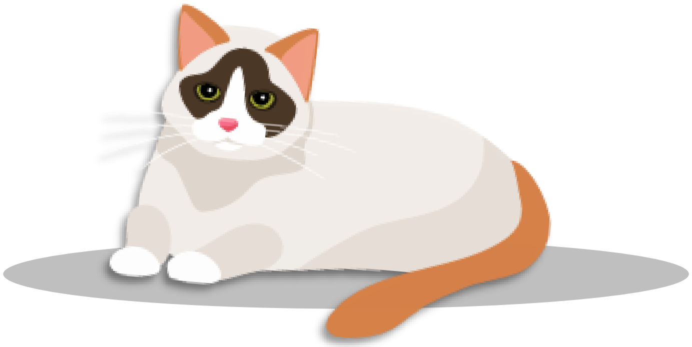


Goals and Incentives

The purpose of this chapter is to help your team understand the importance of setting goals and establishing incentives. Success is a team effort. In this section, we will introduce you to simple formulas that you can use to set realistic, achievable goals and explore different ways of motivating your team over the long-term.

Why is Setting Goals Pivotal to Your Success?

Setting goals and establishing incentives helps keep your team on track and motivated to continue the success of your wellness plan program. Practices who set goals and incentives find greater success with plan enrollments and overall satisfaction amongst team members. It also helps set the mentality that the overall success with plans isn't any one person's responsibility, but a *team effort* instead.



Setting Yourself Up for Success

Goals and incentives are an area where your practice champion will play a pivotal role. By now you've identified one or more persons on your team who will rally your staff. Below are some examples of how your practice champion will lead the charge in helping you define team goals, establish incentives, and chart your course for success.

Your practice champion will be responsible for the following tasks:

- Overseeing the plan enrollment workflow
- Ensuring all revenue associated with plans is being tracked and collected
- Performing WP code, plan item changes, and pricing updates as needed
- Tracking plan enrollment performance, communicating progress towards goals, and holding the team accountable for milestones

Defining Realistic Goals

The industry standard for practices who offer plans *is enrolling 25% or more of active clients*. There are *two ways* that you can approach goal setting:

- Break down the goal by calculating at least 25% of your total number of active clients. Your goal can then be broken down monthly, weekly, and daily intervals.

- Use a schedule-based goal and plan for 10% of your daily and weekly visits to result in new plan enrollments, e.g. 30 visits per day = 3 new plans per day.

Let's begin by gathering and charting data points relevant to your practice. This will help you calculate a *realistic, achievable goal!* Keep in mind that it will take 12 months or more of focused effort to reach your goal. Click this link for a video explanation on using the chart below.

Practice Information

Total Active Plans to Date:	
Average Plans Per Month:	
Areas of Focus for Your Wellness Plan Program:	
Total Active Clients to Date	
Number of Full Time Doctors	
Number of Scheduled Visits Per Day	

Goal: Total # of Active Clients

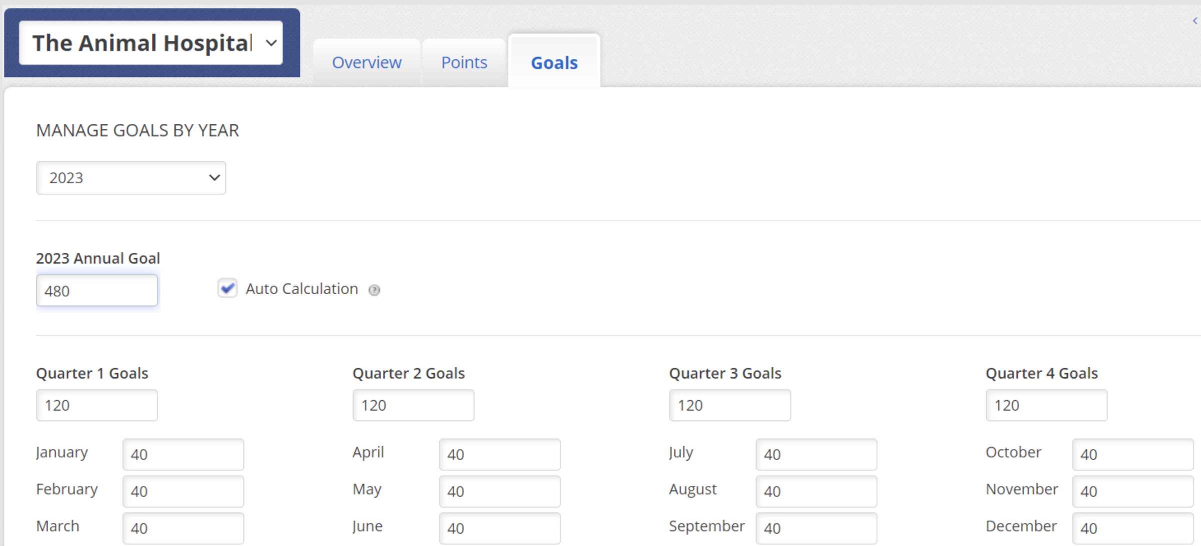
Annual Enrollment Goal	**Total # of active clients X .25 =**
Monthly Enrollment Goal	**Take number from line above and divide by 12 =**
Weekly Enrollment Goal	**Divide annual goal by 52 to get weekly goal =**

Goal: Total # of Client Visits

Daily Enrollment Goal	**Total # of visits per day x .10 =**
Weekly Enrollment Goal	**Multiply # above by # of days open weekly =**
Monthly Enrollment Goal	**Multiply weekly # by 4.35 =**

Tracking Your Progress

Now that you're clear on what your goal is and how to break that down into daily, weekly, and monthly milestones, you can plot it and chart your course on the Petly Plans website. The Petly Plans software will automatically track your progress month-over-month for you. You can use this tool to look for trends in your business and watch as your enrollments grow. Petly Plans' built-in tools *make performance tracking easy!* Follow this step-by-step guide for more information.



Why Incentives Work

Now that you've determined your goals and are set up to begin tracking your progress, it's time to look at ways to keep your staff motivated to support your objectives over the long-term. Incentive programs are a great way to unify your team in support of your goals because they ultimately reinforce the behavior that you want to establish.

Creating an Incentive Structure

Incentive programs fall into two major categories: ***team incentives*** that benefit the entire team when they are achieved, and ***individual incentives*** that celebrate the achievements of the individual staff member. An ideal incentive program combines both approaches.

Below are examples of different types of incentives successful practices have used. Keep in mind these ideas are simply a starting point – the sky is the limit, in terms of what you can create!

Individual incentives

- **VIP Rewards:** Free parking or premium parking space, complimentary veterinary services, SWAG items
- **Time-Based:** Paid time off
- **Monetary:** Cash rewards, gift cards (health and beauty services, Visa, Amazon, Starbucks, retail, etc.)

Team Incentives

- **Food and Beverage:** Pizza party, breakfast club, staff barbeque, taco Tuesday, ice cream social
- **Group Experiences:** Bowling party, rock climbing, escape room, dinner on-the-town, team happy hour, movie night, paint night, mini golf outing
- **Monetary:** Bonus pool, raffle/drawing for grand prize
- **Miscellaneous:** Team SWAG (giveaways: prizes or gift items)

Incentive Program Examples

Below we'll share examples from some of our practices to get you thinking about how you will design your own program. Don't forget that gathering input from your team regarding what motivates them is an excellent place to start. Also, getting staff involved in designing these incentives increases buy-in from the get-go.

Example #1: Combined Incentive – Team and Individual Rewards

After going live with Petly Plans, a large, multi-doctor practice established an annual goal of 2000 plans. They broke this annual goal down to a monthly goal of 100 new plans per month. For every new plan enrolled during the calendar month, $1 was placed in a 'plans fund.' Each time a staff member enrolled a new plan, they were given a raffle ticket. At the end of the first month, they held a grand prize drawing. The raffle winner was awarded the money that had accumulated in the fund. Eligible staff members also qualified for individual gift certificates. Any individual who enrolled 15-24 new plans got a $15 gift card. Anyone that enrolled 25 or more new plans, got a $25 gift card.

The practice also announced that if their annual goal was reached at the end of 12 months, there would be an award for the whole team of $500 towards a group social outing. The group chose a mini golf outing and the $500 went to fund the outing.

Example #2: Team Incentive

A multi-practice group with four locations set a monthly goal of 30 new plans per month. To incentivize their staff to over-deliver on that goal, they decided that all eligible staff members would receive a $15 cash bonus for every plan they each enrolled, over their goal of 30 new plans.

Example #3 – Team Incentive

A mid-sized practice set a goal of 30 new enrollments per month. To get the team excited about kicking this off, they decided that they would sponsor a pizza party for the entire staff once the goal had been achieved. To keep the excitement going, they used colored paper to create a big pizza pie, decorated it and cut it into six slices, then laminated each of the pieces.

Each piece of 'pizza' was then assigned a value of 5 new plan enrollments – 6 pieces of pizza = 30 new enrollments. Each time five new enrollments were completed, a piece of the laminated pizza was put up on the wall in one of the staff areas, until the whole pie was assembled. Not only did they have fun working towards their goal but got a yummy reward for their efforts!

Example #4: Individual Incentive

One practice decided to keep it simple by setting up cash rewards. For each new plan that a staff member enrolled, a $20 cash reward was set aside for them and paid out at the end of the month – *everyone loves a bonus!*

Tracking Your Goals

Having visual *reminders* posted around your practice will help your team keep track of goals that you have set. Goal boards come in many shapes and sizes and can be a fun way to track daily progress and display this information for your team.

Check out this example from **A-Animal Clinic** in Fort Worth, Texas. They posted a goal board in their treatment area to track daily enrollment opportunities vs daily enrollments, as well as view their most popular plan types and add-on items!

Revising Your Goals as Needed

As your number of active clients grow, you may need to revisit your goals. If your practice is on a growth track, we suggest reassessing and adjusting your goals within 6 to 12 months or as needed.

Use the table below to recalculate goals, along with documenting your learnings. It's helpful to look at both 'wins' and areas of improvement as you continue offering plans in the future. Make sure to involve your team in the process. Click here for a list of suggested questions to get the conversation started during regularly scheduled team meetings.

Revised Goal: Total # of Active Clients

Annual Enrollment Goal	Total # of active clients X .25 =
Monthly Enrollment Goal	Take number from line above and divide by 12 =
Weekly Enrollment Goal	Divide annual goal by 52 to get weekly goal =

Revised Goal: Total # of Client Visits

Daily Enrollment Goal	Total # of visits per day x .10 =
Weekly Enrollment Goal	Multiply # above by # of days open weekly =
Monthly Enrollment Goal	Multiply weekly # by 4.35 =

Self-Evaluation: What We've Learned

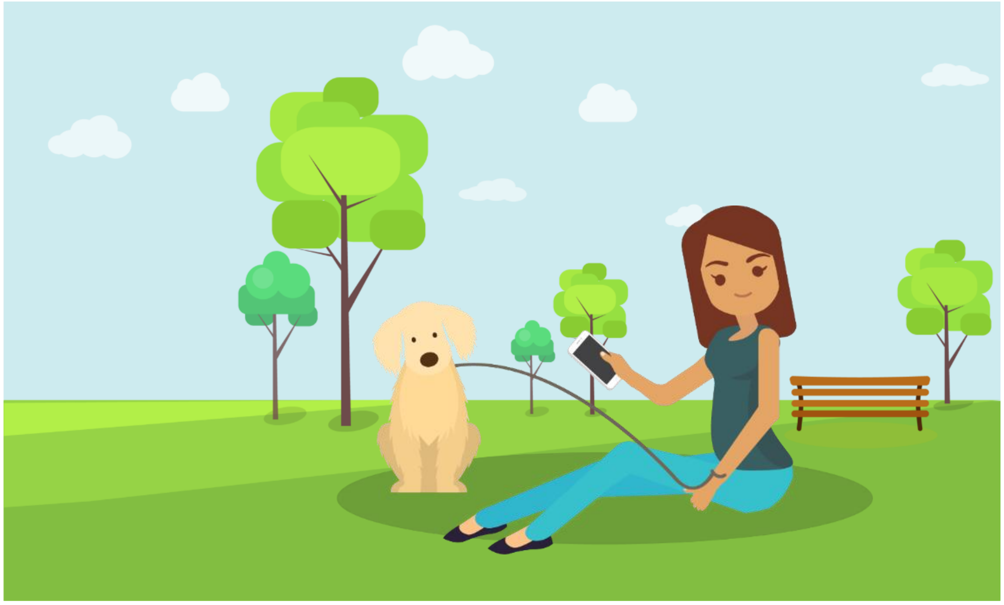
Wins: What worked well	
Areas of Improvement: What we can do better	

Reports

Petly Plans offers a robust selection of preset reports that are designed to help practices manage their wellness plans with ease. Running a combination of both basic and summary reports will enable you to monitor plan item usage, potential payment issues, and outstanding payments to ensure that you're successful in *collecting and tracking* all of the revenue associated with your plans.

In this section we will introduce a few key reports, along with the purpose for running them. We'll also show you where to find additional information on a complete list of reports available in Petly Plans, located on the Helpdesk.

We recommend assigning one or more dedicated staff members to run the reports outlined in this section regularly. In the beginning, it can be helpful to set calendar reminders in your practice management software to alert staff members when to run each of the reports listed below, until it becomes a habit.



Reports for Managing Payment-Related Issues:

Potential Payment Issues Report

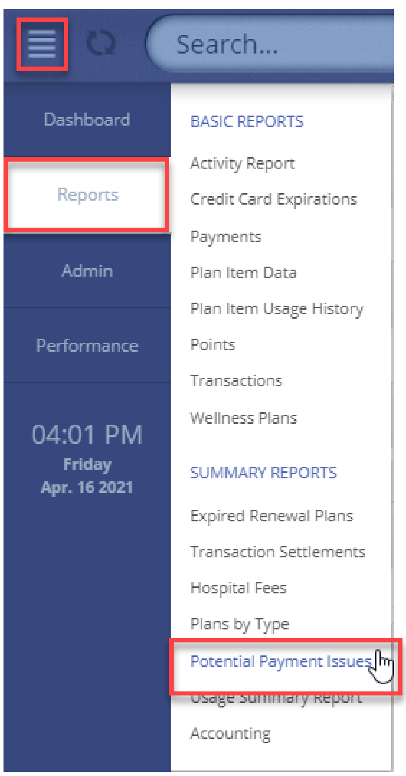
This report will display any wellness plans on a monthly payment schedule with issues that will prevent their payment from processing successfully. The reasons that plans will display on this report include the following:

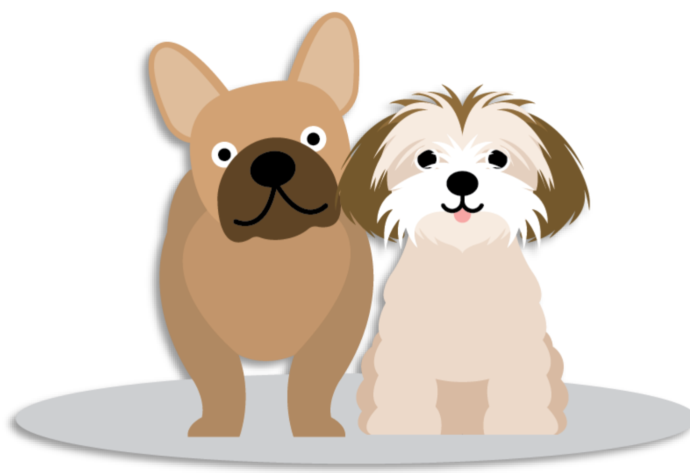
- Plans with payments that have been manually marked as paid
- Plans without a payment method on file
- Plans with payments that have not been set to automatically charge
- Plans that have been placed on hold
- Plans that are suspended in change mode due to plan changes not having been completed
- Plans with expired cards on file
- Plans with a primary form of payment flagged as "Closed" or "Attention"

Best Practice Tip: Run this report *3 to 5 business days* prior to your auto-draft, which occurs on or around the 20th. This will give you time to reach out to the pet owner to correct the issue prior to the payment draft.

How to Locate This Report: **Only users with Admin permission level can access this report*

Path - Menu > Reports Tab > Potential Payment Issues (Summary Reports)





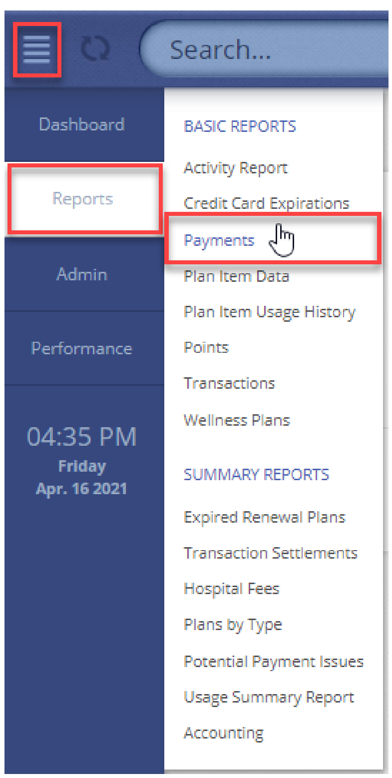
Outstanding Payments Report

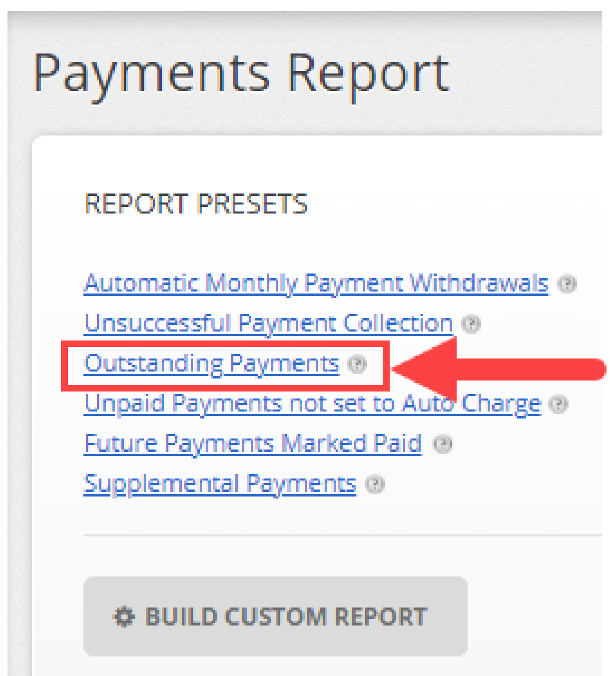
This report will display a list of *any* unpaid, or past due payments associated with plans. Plans listed on this report will require a follow up action. Follow up actions include the those mentioned below. Click this link to view an in-depth video training on declined payments and for more information on the outstanding payments report.

- If payment is due, practice staff will need to contact the pet owner regarding the past due payment and obtain updated payment information, or request permission to manually re-charge the payment in Petly Plans to remove it from the report.
- If the payment was collected in the practice, the payment will need to be marked as ‘paid externally’ in Petly Plans to remove it from the report.
- If payment is not due and the plan has completed, the payment will need to manually be marked as ‘canceled’ to remove it from the report.

Best Practice Tip: Run this report *directly after* your auto-draft has run. This way, you can act quickly to resolve these items with your clients so that payments will draft properly in the future.

How to Locate This Report:
Path - Menu > Reports Tab > Payments > Outstanding Payments (Basic Reports)





Reports for Reconciliation

Transaction Settlement Statement Report

This report provides a summary of settled and rejected transactions within a selected date range. The report settings automatically default to the current month. Once run, the report will display a breakdown of the different transaction types, based on the status of the transaction. You can use this report to reconcile deposits associated with wellness plans made to your practice checking account. Click the link to read more information about this report.

- ***Best Practice Tip***: Run this report at the end of every calendar month to reconcile plan revenue.

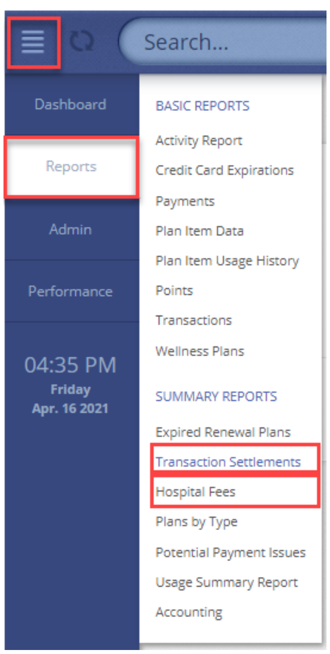
Hospital Fees Report

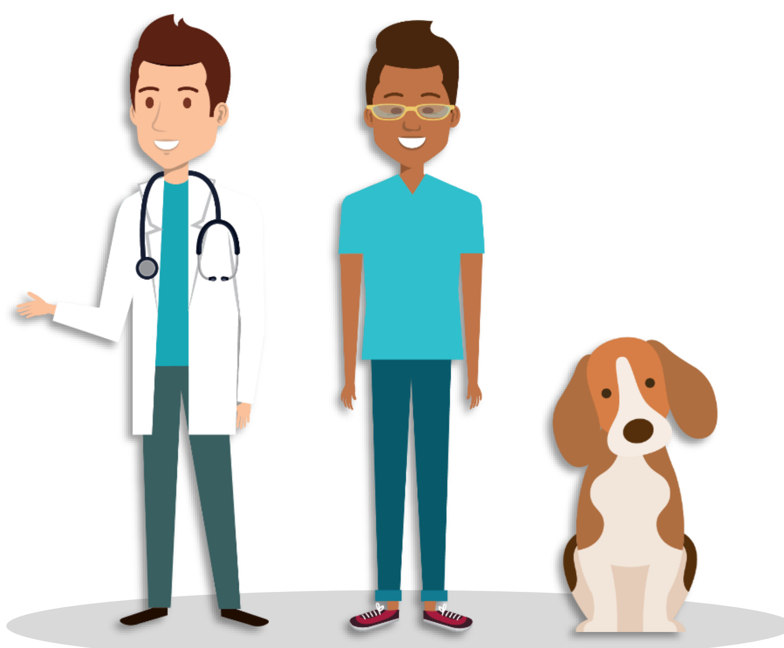
This report displays the IDEXX plan management fees that are charged to your practice monthly. This includes one-time fees for new plan setup, and regular monthly plan fees. Click here to read more about the hospital fees report.

- ***Best Practice Tip***: Run this report at the end of every calendar month to reconcile IDEXX fees.

How to Locate These Reports: **Only users with Admin permission level can access these reports*

Path - Menu > Reports Tab > Transactions Settlements/Hospital Fees (Summary Reports)





Reports for Managing and Tracking Item Usage

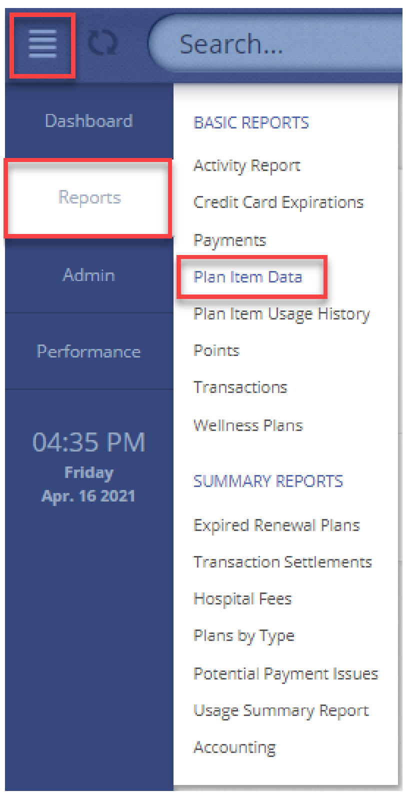
Unaddressed Item Over Usage

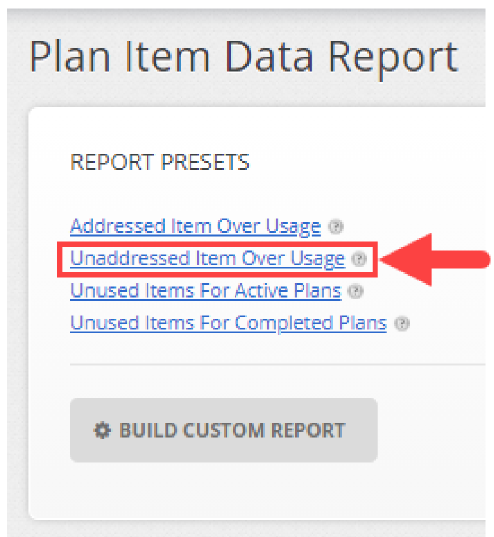
This report identifies plan items (by WP codes) that have been invoiced more times than what is allowed in the plan. When this occurs, it can result in a loss of revenue, due to services that were provided and not charged. Review this helpful article to read more about the unaddressed item over usage report.

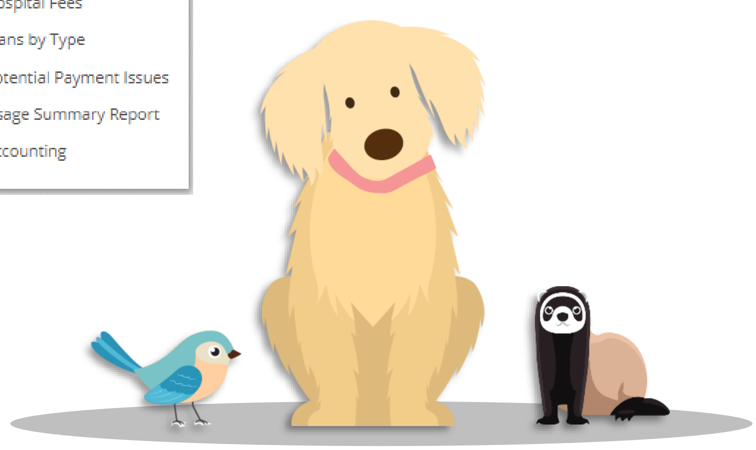
- ***Best Practice Tip***: Run this report at least once a week to catch item over-usage errors. This can also be an excellent opportunity for additional staff training. Remember to review the items listed on the patient's invoice to ensure the client was charged appropriately for services rendered.

How to Locate This Report:

Path* - *Menu > Reports Tab > Plan Item Data > Unaddressed Item Over Usage (Basic)





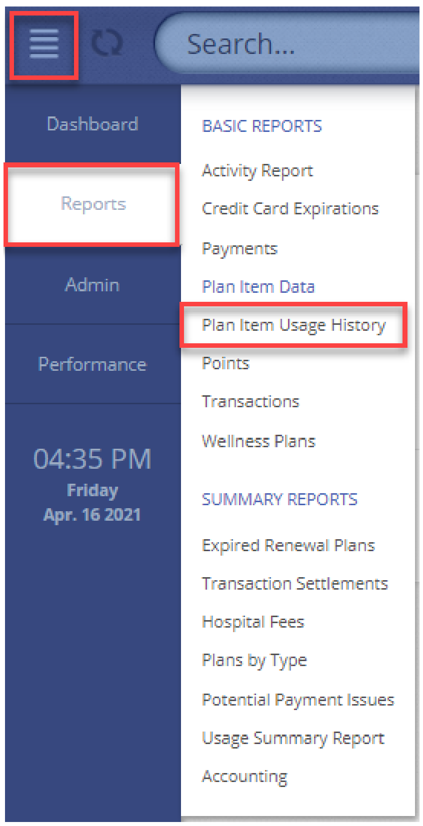


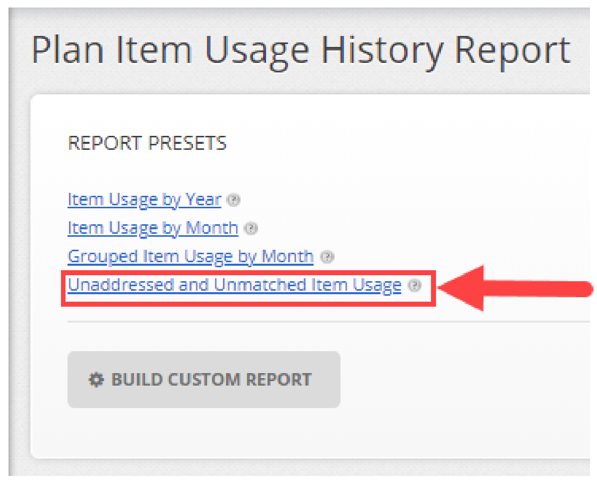
Unaddressed and Unmatched Item Usage

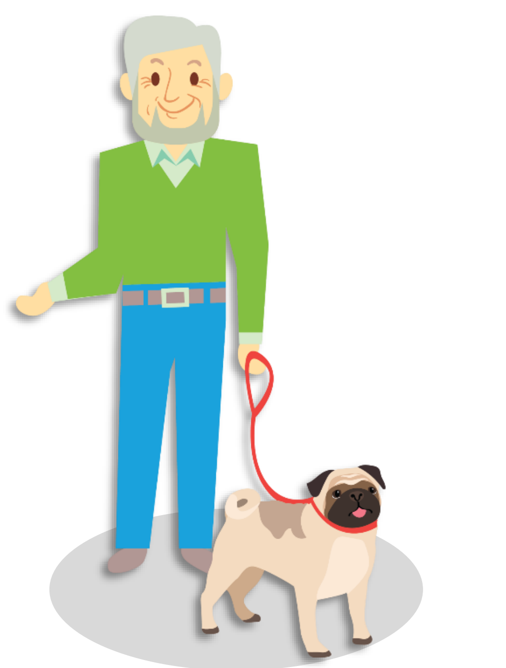
This report identifies WP items that have been used incorrectly. This occurs when WP codes that are not included in the pet's plan type are invoiced. Unaddressed and unmatched item usage can lead to loss of revenue. Click this link from the Helpdesk to review additional information on the topic.

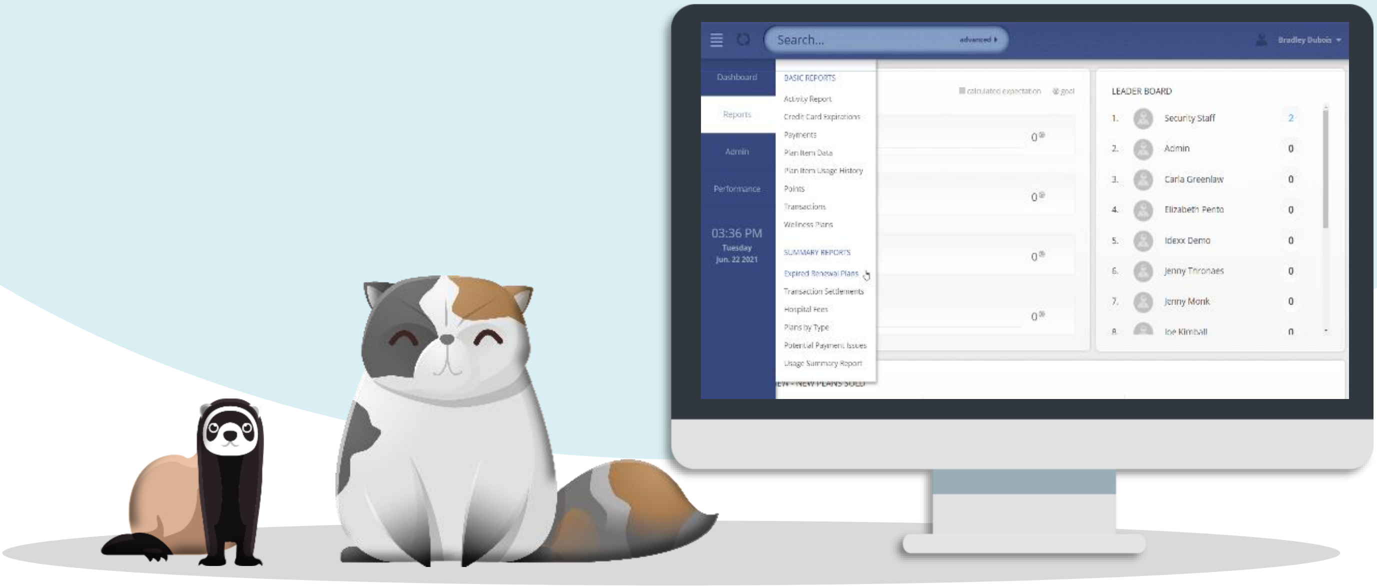
- ***Best Practice Tip***: Run this report at least once a week to catch item over-usage errors in a timely manner. This can be an excellent opportunity for additional staff training. Remember to view and correct any items listed on the invoice to ensure the client was charged correctly for services rendered.

How to Locate This Report:
Path - Menu > Reports Tab > Plan Item Usage History > Unaddressed and Unmatched Item Usage (Basic)



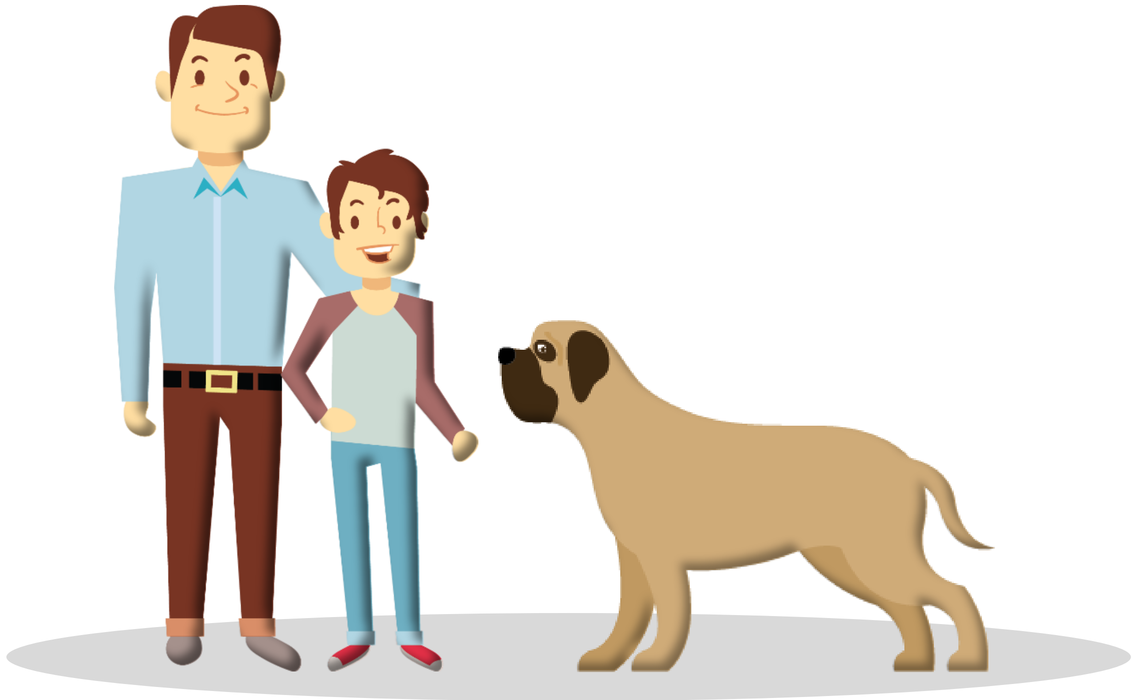






Renewals and Retention

The purpose of this section is to help you understand how to effectively manage plan renewals. As plan revenue builds year-over-year, client retention is a key component of any successful wellness program. We'll introduce you to the tools available inside of Petly Plans and address the automated features of the software designed to save your staff time. We'll also take an in-depth look at renewal status by type, how plan changes impact renewals, and provide best practice recommendations along the way



Compliance with Local and State Governance

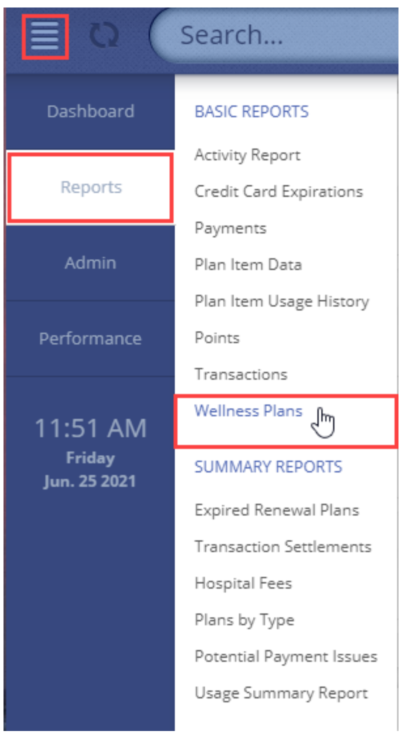
Depending on your local or state governance, you may be required by law to notify your pet owners prior to the automatic renewal of their wellness plans. Make sure to research the laws in your locale so your practice is prepared to comply.

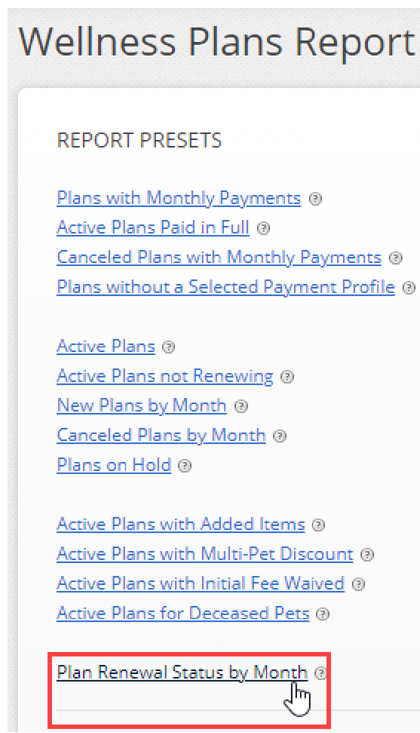
Running a Renewal Report

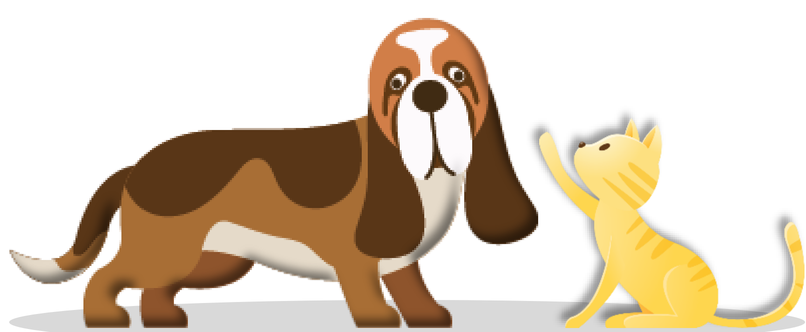
The first step is to run a Renewal Report in Petly Plans. This report will allow you to see all plans that are scheduled to complete within any given month, along with their renewal status. The Petly Plans software default setting for this report is set to the current month, however, this can easily be adjusted, using the drop-down feature to change the report perimeters as needed.

- **Best Practice Tip:** Run a Renewal Report at the beginning of every month, for the following 30 to 60 days out. This will position you to stay ahead of upcoming renewals and allows you ample time to contact pet owners with questions that arise, as needed.

How to Locate This Report:
Path – Menu > Reports Tab > Wellness Plans > Plan Renewal Status by Month

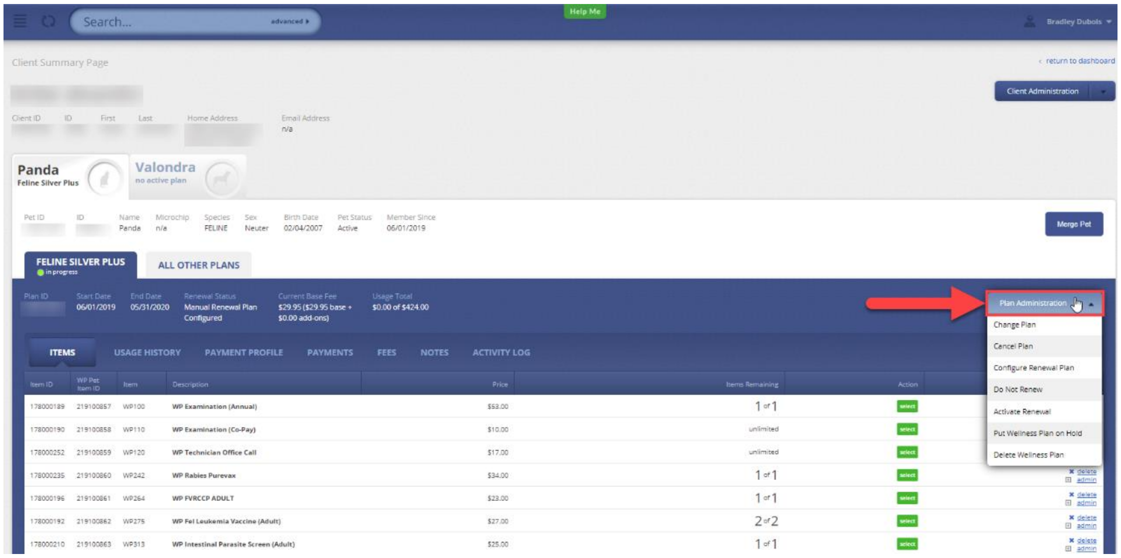






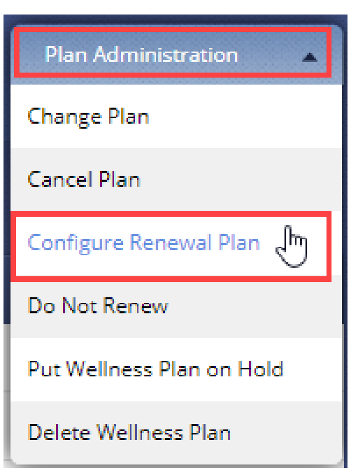
Understanding Plan Renewal Functions

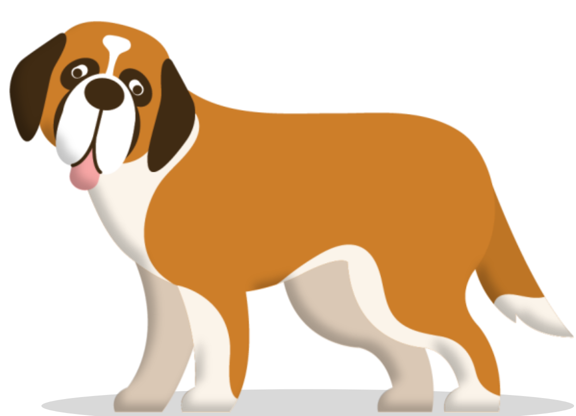
While Petly Plans defaults each new plan enrollment to automatically renew, renewal status can easily be changed based on the needs and circumstances of your pet owners. In this segment, we'll explore different renewal types, their functions, and scenarios in which these functions could apply. *Use of these functions will require Administrator or Manager level user access on the Petly Plans website. All functions can be accessed by locating the active plan and selecting the Plan Administration button on the middle right section of the screen. Speak with your manager for permission to access these functions.*



Manually Configure Renewal

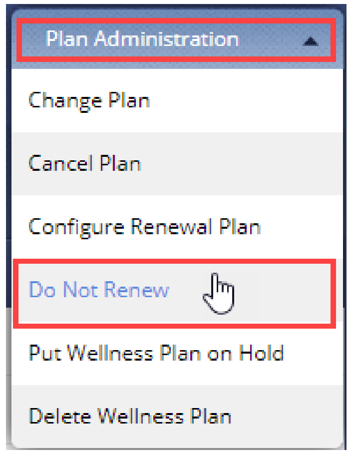
The use of this function changes the plan type or optional items, upon renewal. For example, you may have an adult canine on a Gold Plan scheduled to automatically renew within 90 days. The pet owner may want to upgrade this plan to the next plan tier, Platinum, to obtain additional services. In this case, you would need to configure the renewal plan manually. Remember, all plans automatically renew into the same plan tier, except generally in the case of puppy/kitten to the lowest adult tier. You would also use this function to add or remove optional plan items to the renewal plan. For example, Fluffy is on a Canine Gold plan, which is set to automatically renew into Canine Gold. Based on the doctor's recommendation, Fluffy will need a T4 Thyroid test next year. Because the T4 is not included in the included base items for the Canine Gold, you would need to manually configure the renewal to add the T4 to Fluffy's plan for next year.





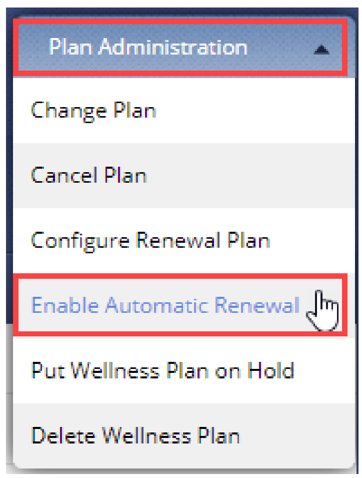
Set Plan to 'Do Not Renew'

This function is used to disable the plan from automatically renewing. For example, you may have a pet owner who is moving out of state and will no longer visit your practice. The pet owner's payments will continue to automatically draft until the plan ends.



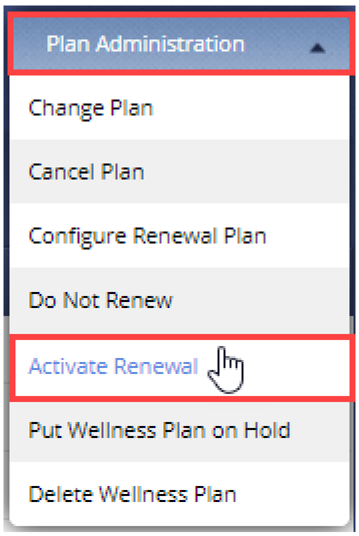
Reenable Automatic Renewal

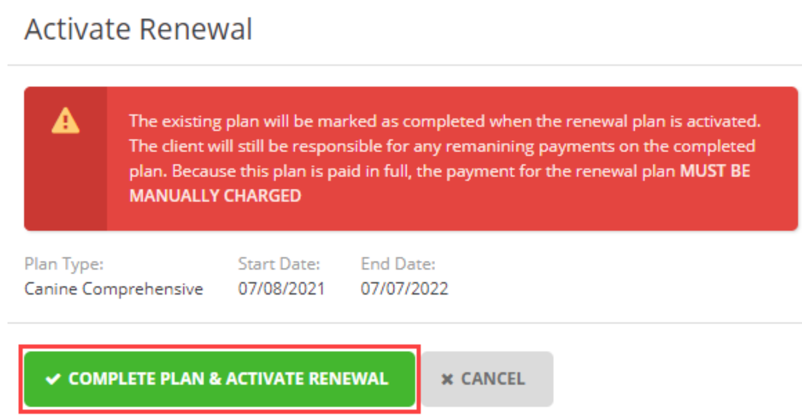
This function is used to turn the automatic renewal back on. This could be utilized when a plan was mistakenly disabled, or a pet owner changes their mind and wants to continue with their plan. This function must be performed prior to when the existing plan completes.



Activate Renewal Early

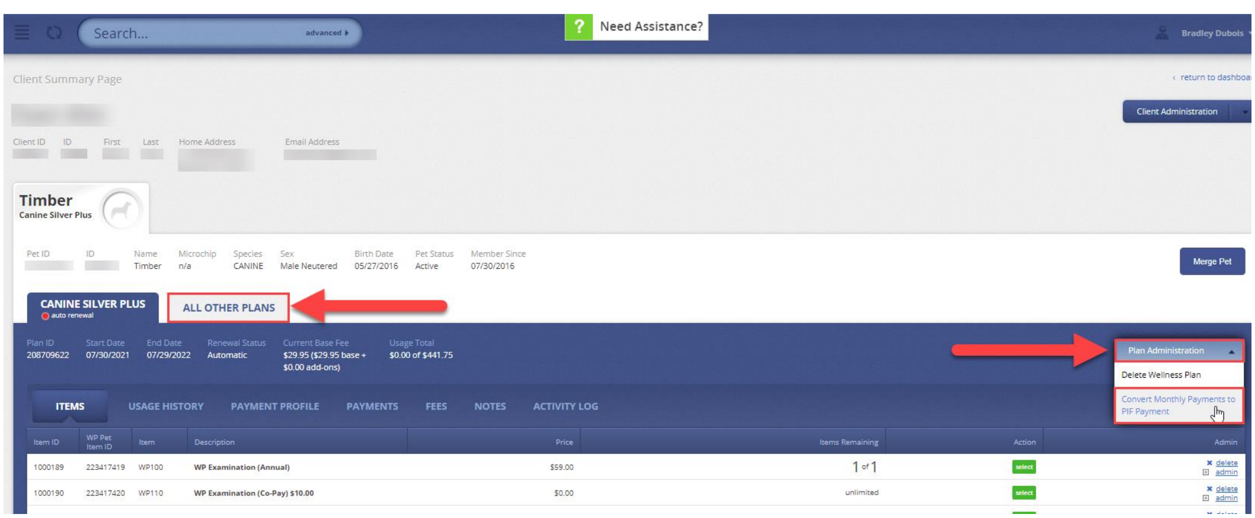
This function can be used if a pet needs services that have been used on the current plan that will not be available again until the plan renews. Renewing a plan early will not change the actual plan renewal date. You can only use this function within 60 days of the plan's actual renewal date. Also – if the pet's plan was paid in full, you will need to manually initiate the annual payment, as the plan will no longer be able to draft automatically on the actual anniversary date.





Convert Renewal Plan's Payment Configuration

This function is used to change a plan's payment configuration from 'Paid in Full' to 'Monthly Payments' or vice versa. This option is available beginning at 60 days prior to the renewal date and remains available until the day before the plan renews. Be sure to review the 'All Other Plans' tab and view the renewal plan you'd like to update. If the pet owner wants to change the payment configuration after the renewal has already processed, the plan would then have to be cancelled and a new plan set up in its place. This results in the practice being charged a new plan fee.

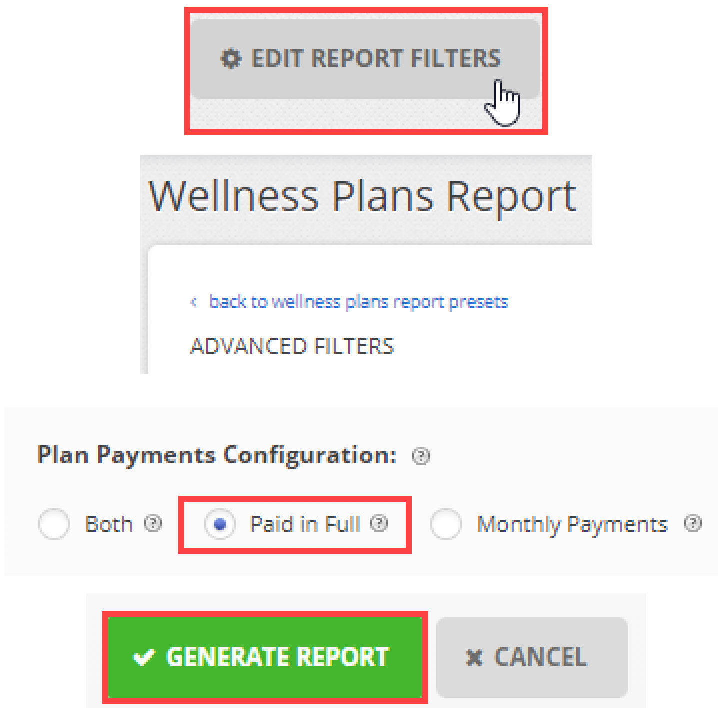


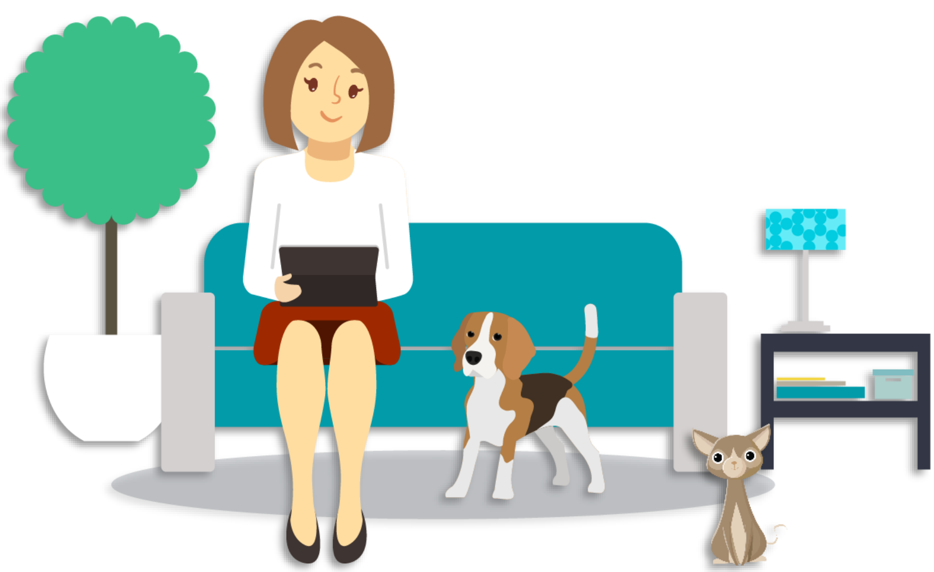
Reviewing Paid in Full Plans

We recommend when running your renewal report, you also apply report filters so you can look at all paid in full plans and plans set to renew. This will allow you to reach out to any pet owners who have paid in full plans set to renew. You can then confirm whether they would like to continue to pay in one lump sum or convert to a monthly payment schedule.

How to Review Paid in Full Plans

Path – Menu > Reports Tab > Wellness Plans > Plan Renewal Status by Month – While viewing the 'Plan Renewal Status by Month' Report, click the 'Edit Report Filters' button. This will display a screen with a series of options. Check the box for 'Paid in Full' under the header, 'Plan Payments Configuration' then click the 'Generate Report' button.



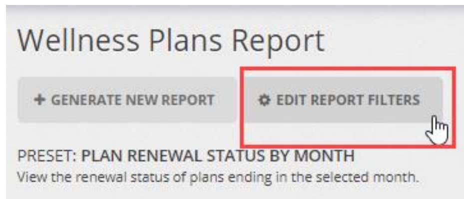


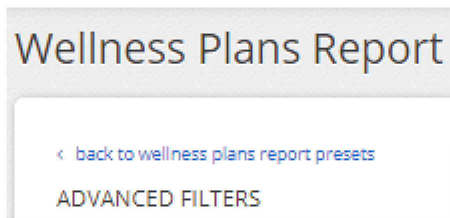
Reviewing Plans with Add-On Items

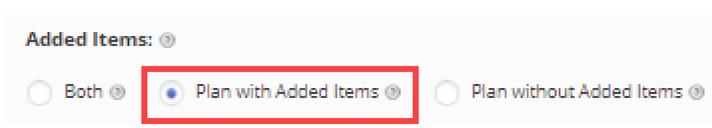
We also recommend applying report filters to review any plans that have add-on options included in them. This ensures add-on items are carried over into the plan renewal.

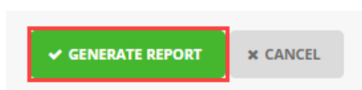
How to Review Plans with Add-On Items

Path – Menu > Reports Tab > Wellness Plans > Plan Renewal Status by Month – While viewing the 'Plan Renewal Status by Month' Report, click the 'Edit Report Filters' button. This will display a screen giving you a series of filter options. Check the box for 'Plans with Added Items' under the header, 'Added Items' then click the 'Generate Report' button.

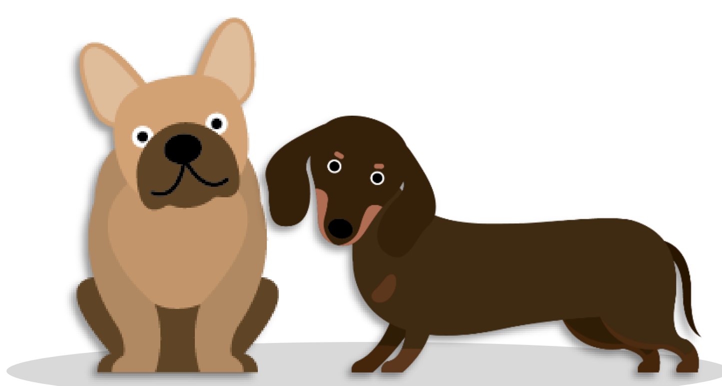


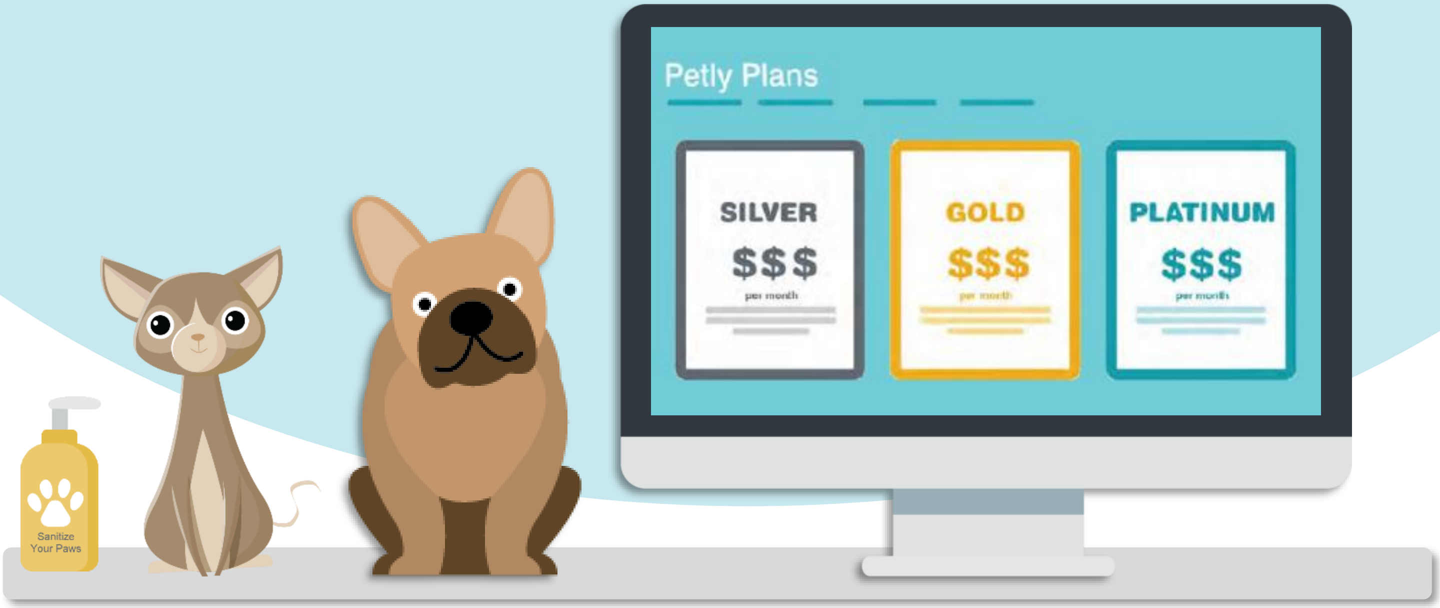






Best Practice Tip - Create a reminder in your client communication software to automatically alert the pet owner their plan is renewing.





Pricing Updates

This guidebook outlines the steps a Petly Plans practice should follow when updating their base monthly fees. The guide links to Helpdesk articles about editing your wellness plan templates, managing renewal pricing, an example renewal letter to send to clients, as well as providing best practice tips and suggestions, and how-to explanations, with images throughout.

Base Monthly Fee Increase

The best practice recommendation is to increase your base monthly fees about every 2 to 3 years. Adjusting your pricing with this cadence will ensure your pet parents are accustomed to paying a consistent amount for their plans without the perception of overpaying. This will also ensure your pricing is in line with your increased operating costs.

Determining Your Price Increases

Does your practice have a cost increase determined for each plan after carefully analyzing plan item costs? It's important to consider when you last increased prices and by what amount when determining how to proceed. Before you implement WP price changes you may want to discuss the proposed changes with a Petly Plans team member. This will help ensure you are setting fair and accurate pricing.

Not Sure How to Establish New Base Monthly Fees?

A Petly Plans team member can conduct a plan review with you. Rate increases will be determined with the current cost of each plan item and any applicable plan discount.

Wellness Plan Items

In this section, we will review best practices for adding or removing wellness plan items from your plans and updating WP code pricing in your Practice Information Management Software, referred to in this guidebook as PIMS, for short.

Adding Plan Items

Updating your base monthly fees can be a great opportunity to evaluate the content of your plans! Entice pet owners to enroll and improve the health of pets by including member perks like exam co-pays, complimentary or discounted nail trims, anal gland expressions, and tech office visits. Consider offering optional add-on items like advanced diagnostics, non-core vaccines, flea, tick, and heartworm preventatives, and others. Adding items into your plans may require creating new WP codes in your PIMS to track usage of these items inside your Petly Plans software. Adding items may also require creating all new plan templates in Petly Plans to avoid item usage errors. A Petly Plans team member can review your proposed price updates with you. Additionally, click this link to review the Guidebook to Managing Your Wellness Plan Program. Here, you can visit the Plan Development section for more best practices on developing successful plans.

Removing Plan items

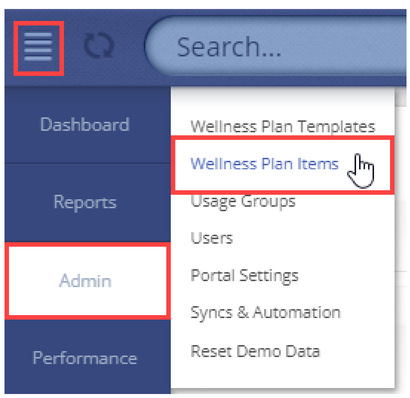
Do certain wellness plan items consistently remain unused year-over-year? Consider running the *Unused Items for Completed Plans* report to isolate trends in your plan usage. To run this report, go to *Menu > Reports > Plan Item Data > Unused Items for Completed Plans*, and select a year. The results of this report can help you determine if certain items could be removed from your plans due to lack of consumption or designated as add-on items instead. Click this link to read more about running this report. Additionally, it is important to remove or inactivate any WP items from your PIMS and inside Petly Plans if your practice no longer offers them. Click the links to read about deactivating a WP item within your PIMS and Petly Plans.

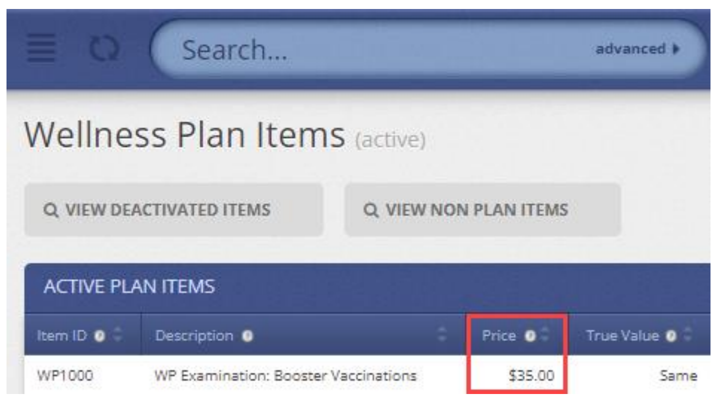
Updating WP Code Pricing

Have your WP code prices been updated to reflect the current retail value of each item included in your plans? It's important to update WP code costs any time the prices of your regular invoice items increase, even if you are not changing your base monthly fees. Keep in mind, updating the price of a WP code inside your PIMS will ***not*** alter the base monthly fee pet owners pay for their plans. This fee only changes when you manually update it in the Petly Plans software. If the retail cost of an optional add-on item is changed, the add-on monthly fee will adjust within the plan at the time the plan renews or if a plan change is performed. To review which prices Petly Plans recognizes for each WP code, go to *Menu > Admin > Wellness Plan Items* and review the *Price* column.

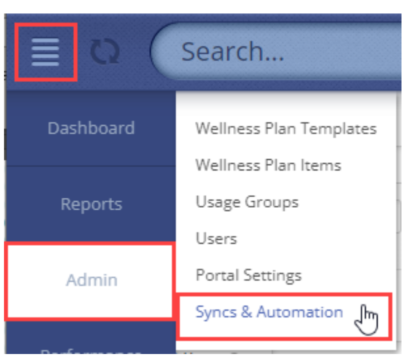
These prices are the values Petly Plans uses to calculate the dollar value of services consumed in a plan if a pet owner cancels before the end of their plan term. Updating these prices ensures pet owners are held accountable for the current price of every plan item. WP prices in Petly Plans are determined by costs set up inside your PIMS. Any price updates inside your PIMS will automatically update in the Petly Plans software either after an automatic overnight sync, or with a manual sync. To manually sync WP prices after updating them in your PIMS, go to *Menu > Admin > Syncs & Automation > Sync Items*. We have also provided screenshots on editing the WP code pricing for Cornerstone, AVImark, and ImproMed software systems in the next section.

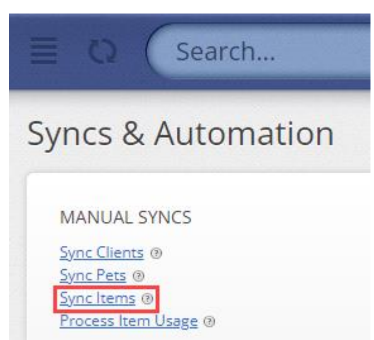
Viewing pricing in Petly Plans





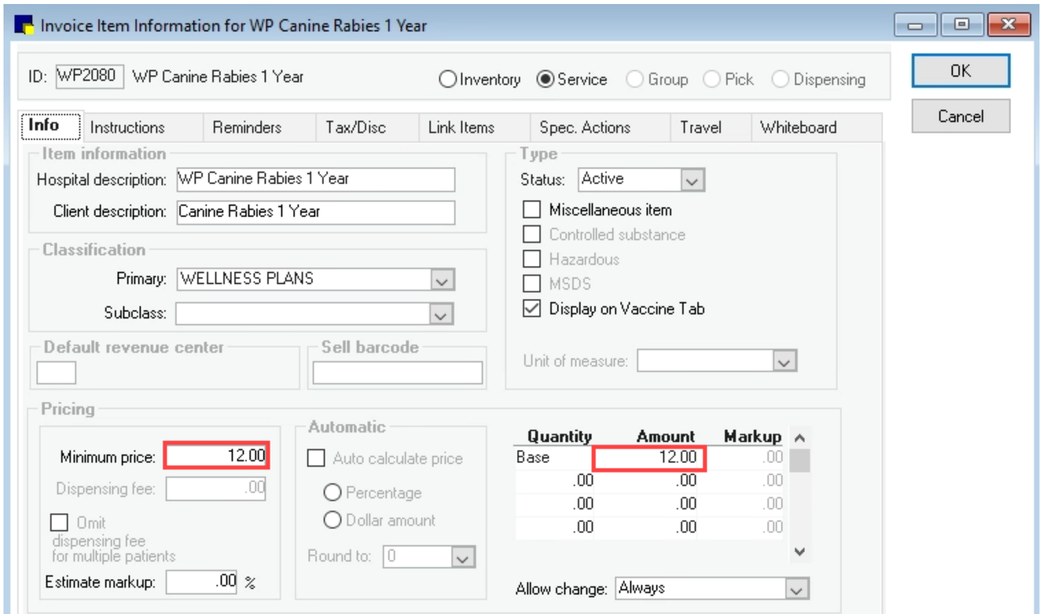
Manual sync to update item pricing





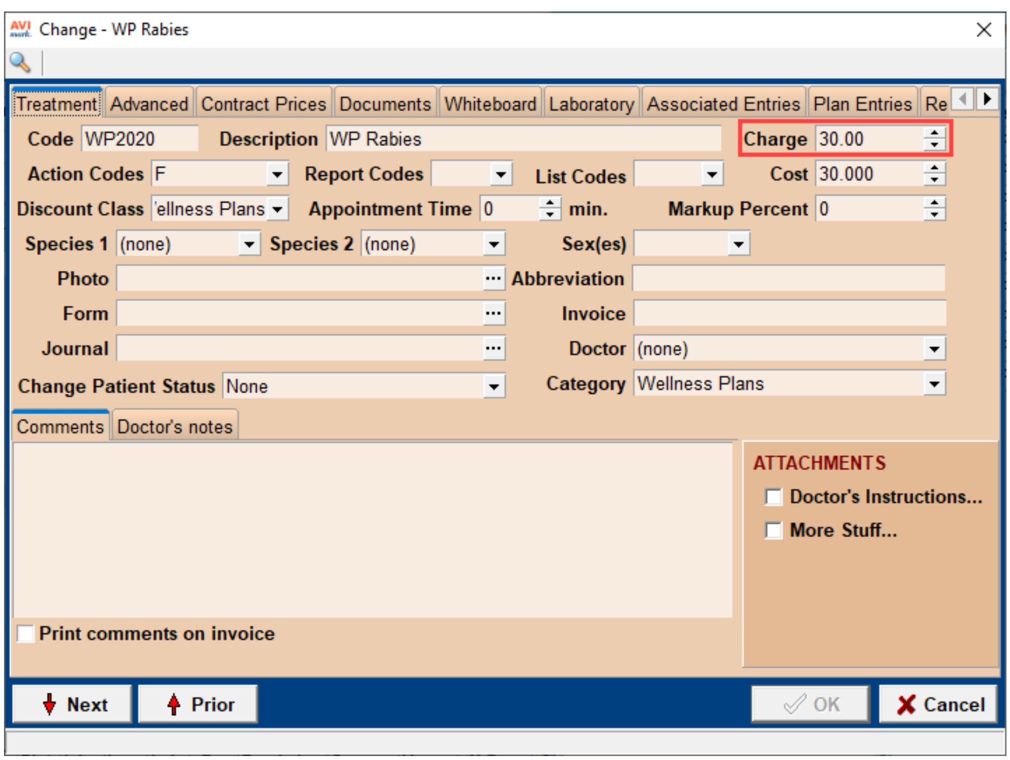
Cornerstone

WP codes must have matching prices in both ***Base*** and ***Minimum*** fields on the *Info* tab of each WP item for Petly Plans to recognize the correct price. See below for a screenshot of the invoice item setup in Cornerstone. Note, the *Base* and *Minimum* areas outlined in red. Please ensure the current retail prices are listed here any time your prices change.



AVImark

Your Petly Plans website recognizes pricing from AVImark's treatment codes from the ***Charge*** area of each WP item's *Treatment* tab. Note this area outlined below in red. Please ensure current retail prices are listed here any time your prices change. Review the [Petly Plans Setup in AVImark Guidebook]() for more information.

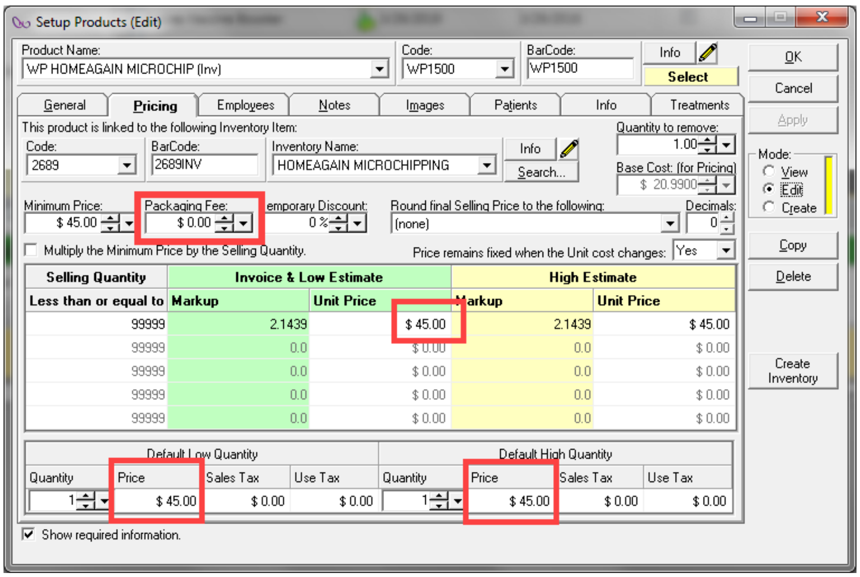


ImproMed

Petly Plans recognizes pricing from ImproMed's ***Price*** fields under the ***Default Low Quantity*** and ***Default High Quantity*** sections of the *Setup Products* window. Below are two examples of ImproMed WP items, one with a *Packaging Fee,* and one without. Please ensure your current retail prices are listed appropriately any time they change.

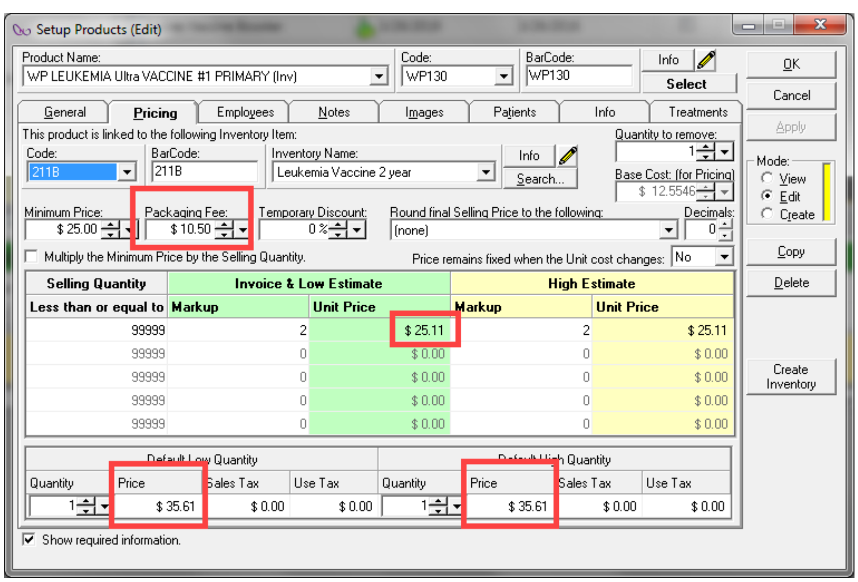
WP Item without a Packaging Fee

In this example, the *Unit Price* of the item is $45.00. The retail cost is also listed under the *Default Low Quantity* and *Default High Quantity Price* fields as $45.00. The retail price is the sum of the *Packaging Fee* and the *Unit Price*: $0.00 + $45.00. Listing the retail price in the two *Price* fields at the bottom will ensure Petly Plans recognizes the correct amount for your WP item.



WP Item with a Packaging Fee

In this example, the *Unit Price* of the item is $25.11. The retail price, however, is listed under the *Default Low Quantity* and *Default High Quantity Price* fields as $35.61. The retail price is the sum of the *Packaging Fee* and the *Unit Price*: $10.50 + $25.11. Listing the retail price in the two *Price* fields at the bottom will ensure Petly Plans recognizes the correct amount for your WP item.



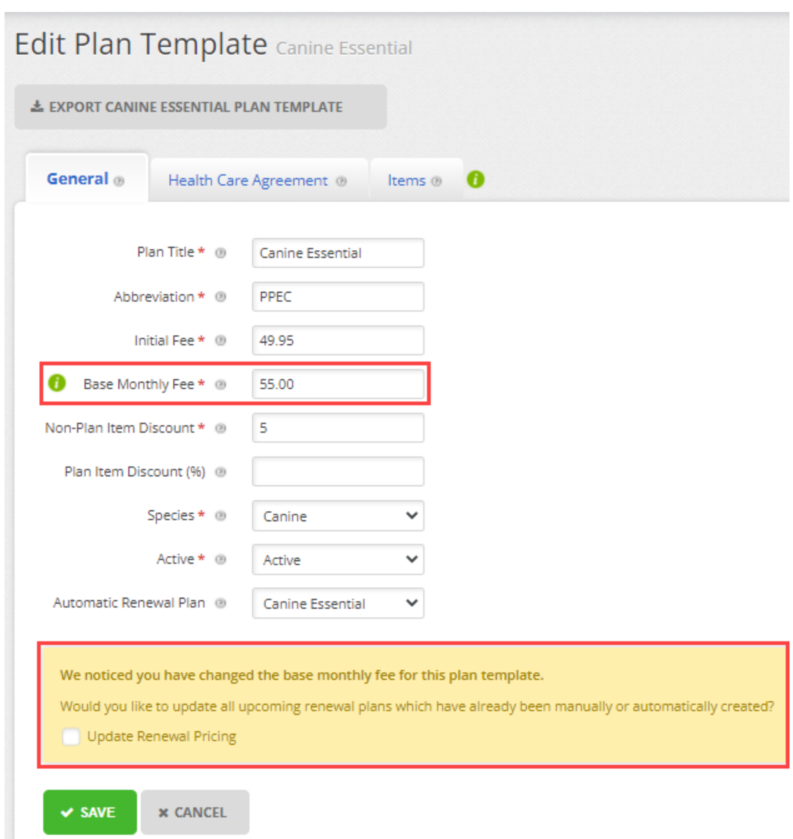
Editing Plan Pricing and the Effect on Renewals

It is important to inform pet owners of new pricing before increasing fees. Not providing sufficient notice before a monthly draft could result in clients refuting charges with their banking institutions out of confusion, or worse, cancellation requests. Click this link to download a sample renewal letter to inform clients. Customize your letter by adding the practice logo, info about base monthly fees, and any improvements you've made. Print and mail or email this letter to plan holders and keep a digital record of when and where your letter was sent inside your PIMS.

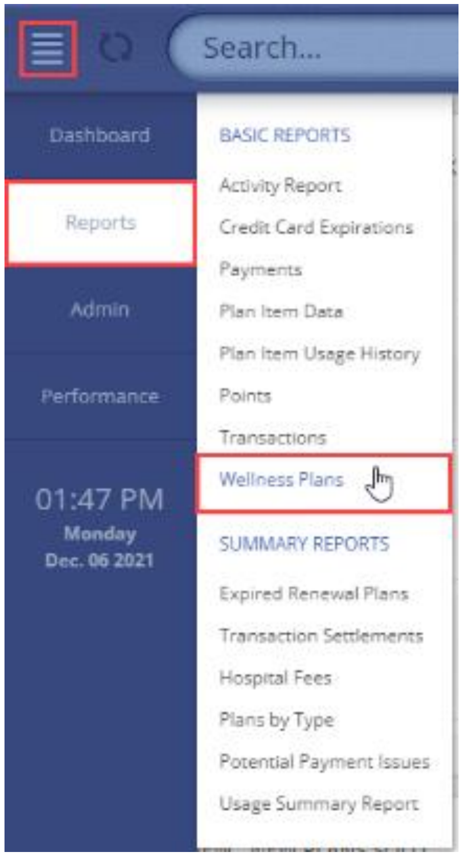
After you've given your pet parents adequate time to review your correspondence, you may safely update base monthly fees in your Petly Plans software. Click this link to review a Helpdesk article about updating pricing and the effects on renewal plans. These instructions assume the only changes made to your plans are with the base monthly fees. *If you've decided to add or remove items, contact a Petly Plans team member to determine a best path for implementing your proposed changes to avoid usage errors*.

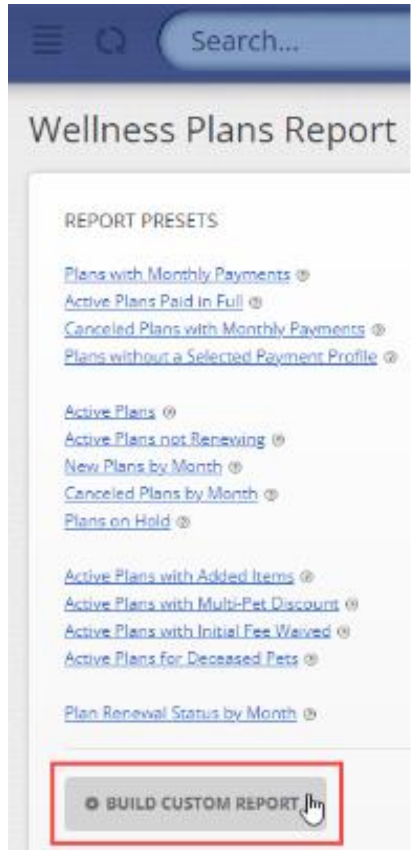
When you update base monthly fees, you have the option to choose whether to apply the price change to upcoming renewal plans that are already configured, as noted below. Plan renewals automatically configure 60 days before a plan's end date. Review a report of plans with configured renewals before deciding to update all renewal plan prices. To run this report, go to *Menu > Reports > Wellness Plans*, and select *Build Custom Report*. In the *Wellness Plan Status* section in the upper left, under the *Inactive* column, check the *Renewal* box, which will automatically check the *Automatic Renewal* and *Manual Renewal* boxes. Scroll to the bottom of the screen and click *Generate Report.* We recommend informing your configured renewal clients of the price change prior to their renewal date. Visit the link at the beginning of this paragraph for additional instructions or speak to a Petly Plans team member for more info.

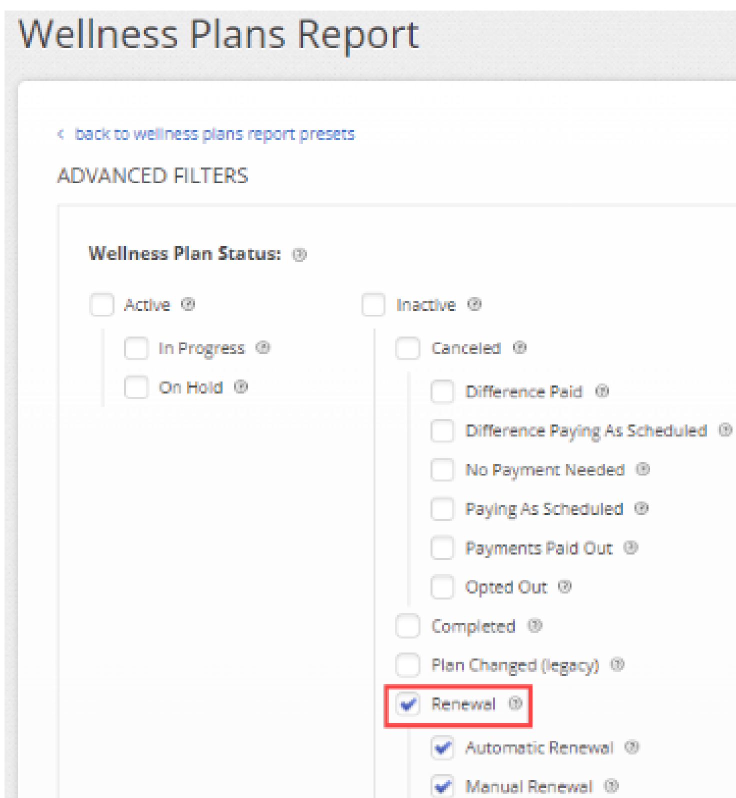
Update Renewal Pricing prompt when the *Base Monthly Fee* field is edited



Building a custom report of configured renewals



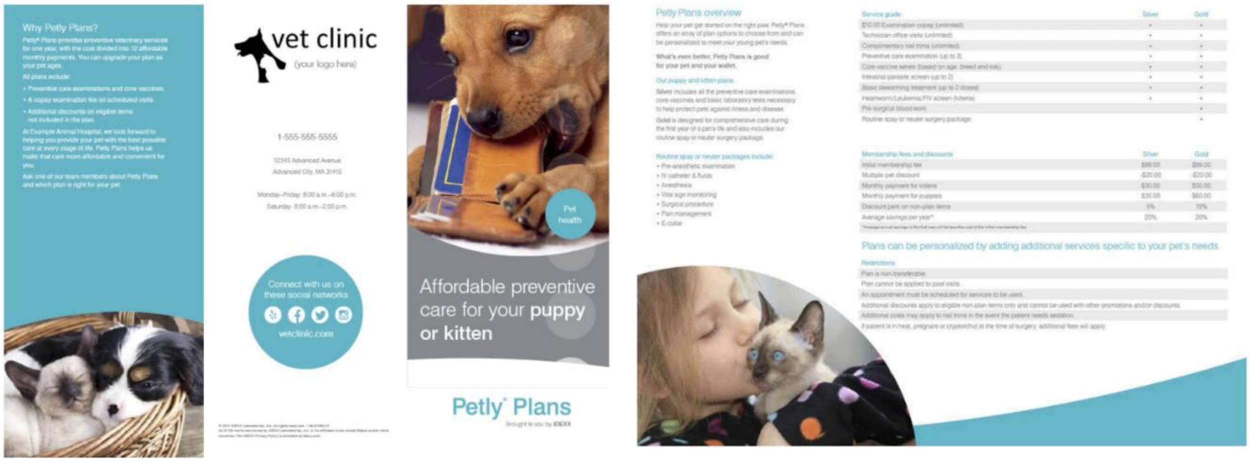




Marketing

Ordering new brochures and flyers will help you easily spread the word about your updated plans. The Petly Plans design team can also customize and configure new service and price charts so pet owners who visit your website have the most current plan information. Click the link to visit the Petly Plans marketing site and peruse our wide array of marketing collateral. Be sure to add a note on your order form indicating your prices or services have changed.

Example of a customizable puppy and kitten brochure



Example puppy and kitten service guide

Service guide	Silver	Gold
Complimentary scheduled physical examination (unlimited)	•	•
Preventive care examination (up to 4)	•	•
Core vaccine series (based on age, breed and risk)	•	•
Intestinal parasite screen with Giardia	•	•
Basic deworming treatment (up to 3 doses)	•	•
Leukemia and FIV screen (kittens)	•	•
Heartworm screen (puppies)	•	•
Pre-surgical blood work		•
Routine spay or neuter surgery package		•
Microchip		•

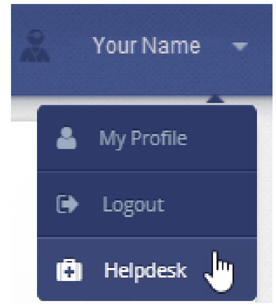
Example price sheet with prices disclosed

Membership fees and discounts	Silver	Gold
Initial membership fee	$99.00	$99.00
Multiple-pet discount	-$10.00	-$10.00
Monthly payment	$25.00	$50.00
Discount perk on non-plan items	10%	10%
Average savings per year*	25%	25%

*Average annual savings in the first year will be less the cost of the initial membership fee.

Staff Awareness

Any time you update your base monthly fees or make changes to your plans, it is pivotal to communicate these changes to your staff. Discuss these matters in a staff meeting to ensure all teams are poised to spread the word about your plan changes to pet owners.



Additional Resources

The Petly Plans Helpdesk is an excellent resource to learn more about your wellness plan program. Click your name in the upper right-hand corner of your Petly Plans software and select Helpdesk to view and search for assets, including help articles, videos, and other troubleshooting resources. Below are web links from the Helpdesk and other websites as they relate to each section of the guidebook. We've also included a link for retraining staff on Petly Plans.

Plan Development

- Editing wellness plan items
- IRS rules for veterinary employee discounts

Marketing

- Petly Plans Helpdesk: Marketing to Your Pet Owners
- Petly Plans Marketing Page to place a marketing order
- Petly Plans Recorded Webinar: Marketing to Your Clients.
- Petly Plans mock website to help you design your practice's wellness plan pages
- Petly Plans pet owner FAQ's
- Video: Tips to Engage and Educate your Clients on Social Media
- IDEXX Practice Life website, for everything practice management
- Images for your website, newsletters, social media posts, and more
- Pet Health Network for content to share in newsletters, social media, and more
- Petly Plans Playbook – Tools for Success
- Staff Scripts
- How-to add messages to Cornerstone and AVImark invoices and estimates
- Owner pre-approval form
- Slide deck to play in waiting area
- Social media posts
- Pre-launch and launch day posts
- 6-minute social media training video
- Newsletter content
- Branding consultation

Workflow

- Petly Plans whiteboard to track performance

Goals and Incentives

- Goal assessment
- Understanding performance goals
- 7-minute goals and incentives training video
- Performance tracking overview
- Editing points
- Manually adding points
- Deleting points
- Points report overview

Reports

- Basic and summary reports overview
- 25-minute declined payments training video
- Transaction settlement statement report
- Hospital fees report
- Unaddressed item over usage
- Unaddressed and unmatched item usage
- Transaction settlement statement report
- Hospital fees report
- Weekly management of improper item usage and overdue payments

Renewals and Retention

- Manually configure renewal
- Set plan to 'do not renew'
- Reenable automatic renewal
- Activate renewal early
- Convert renewal plan's payment configuration

Pricing Update

- Plan Item Data Report to isolate underutilized plan items
- Editing Wellness Plan Items
- Deactivating a WP Item in your PIMS
- Deactivating a Plan Item in Petly Plans
- Review and download a sample renewal letter to clients
- Changing Plan Templates and the effects on renewal plans

Staff Training

- Staff Training Guidebook