

Petly Plans: Staff Training Guidebook



Purpose

This guidebook is designed to help practices onboard new staff members by providing self-paced training plans. Topics covered by this guide include adding users, enrolling pets in plans, performing common functions within the software, communicating the value of plans, marketing to pet owners, establishing your plan enrollment workflow, setting goals and incentives, managing reports and renewals, and long-term plan retention.



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Getting Started

Throughout this guidebook you will find a compilation of assets including videos, articles, and guidebooks. While most of the information is housed on the Petly Plans Helpdesk, you will also need to set up logins to the IDEXX Learning Center (ILC) so staff can access video content.

Setting up Staff Logins

Do members of your practice have access and the correct user level permissions set on your Petly Plans website? [Click this link](#) to learn how to add new users to your Petly Plans website. Need guidance on how to assign the correct permission level for each staff member in the software? [Click here](#) to understand the differences between user types within Petly Plans.

Accessing the IDEXX Learning Center

The ability to view most training videos on the Petly Plans Helpdesk requires your staff members have login access to the IDEXX Learning Center. The ILC is a repository of complimentary training courses and live events covering a broad range of veterinary topics. [Click this link](#) for step-by-step instructions on creating accounts for each team member. For additional help and support with the IDEXX Learning Center, including password resets, call **888-943-3993** or [visit this website](#) to submit a ticket to the ILC support team.

Managing Your Preventive Care Plans


As a starting point, most staff should be able to perform basic functions in the Petly Plans software. Commonly, CSR's, reception staff, and technicians, will be performing the functions outlined in this 20-minute training video [linked here](#). The topics in this video include:

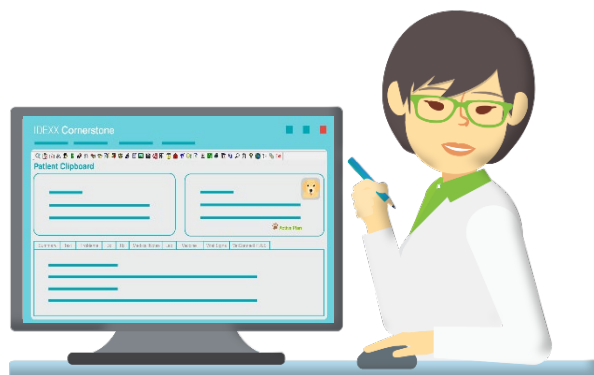
- ☐ Benefits of preventive care plans for pets, pet owners, and your practice
- ☐ Enrolling pets in plans
- ☐ Locating an active or inactive plan
- ☐ Performing plan upgrades and cancellations
- ☐ Navigating the Petly Plans software



Review Your Practice's Plans

Familiarize yourself with your practice's wellness plans. You can find information inside the Petly Plans software, your practice website, or by reviewing your printed marketing materials. Become acquainted with monthly pricing, discounts, services covered in each plan tier, membership perks, and restrictions.

 **Best Practice Tip:** We suggest printing a copy of this guidebook and adding it as a resource to your practice's onboarding program for new hires.



Invoicing in Your Practice Information Management Software

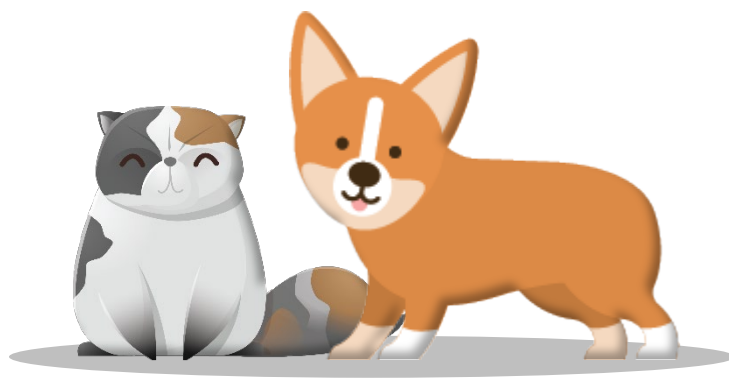
In this next section, we provide resources on using WP invoice items designed specifically to invoice wellness plan items in your PIMS. We will focus on the two most common software systems, Cornerstone and AVImark.

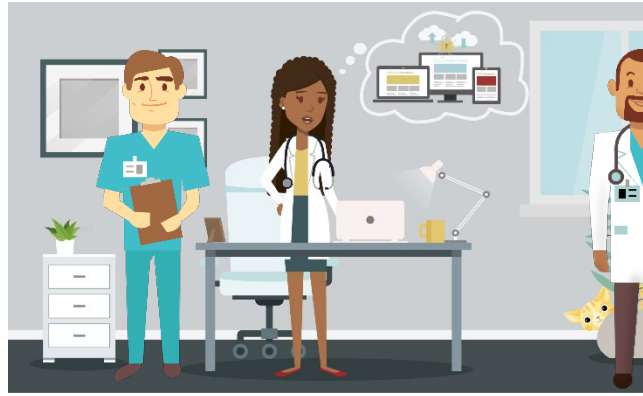
- ☐ **Cornerstone:** [Click this link](#) for more information on enrolling and invoicing WP codes in Cornerstone.
- ☐ **AVImark:** The invoicing process in AVImark will vary depending on how your practice has chosen to set up your wellness plans. We will show all the three commonly used invoicing methods on pages 7-10 of the [Petly Plans Setup in AVImark Guidebook](#). Consult with a member of your management team if you are unsure how your practice invoices WP codes in AVImark.

How to Talk to Pet Owners About Plans

Each of your staff members will be involved in discussing plans with your pet owners. As a result, it's imperative that your team members are comfortable and confident having these discussions. We suggest downloading and reviewing the [Staff Scripts from the Petly Plans Helpdesk](#). Spend some time role-playing together as a team to ensure everyone is poised to engage in conversations with your clients. Reinforce that staff members are *not* selling anything. They are merely educating pet owners about the options your practice has available. Topics covered are:

- ☐ Enrolling puppies and kittens
- ☐ Enrolling adult dogs and cats
- ☐ Improving dental compliance with plan enrollments
- ☐ Plan cancellation
- ☐ Pet owner objections
- ☐ Frequently asked questions about your software






Advanced Training for Administrators and Managers

Practice administrators and managers will commonly perform additional functions related to plan management and promotion. In this next section we will discuss the key practice areas of your wellness program that need to be overseen long-term. This will ensure that you are effectively promoting plans and collecting all the revenue associated with them.

How to Market Your Plans

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. The **Petly Plans Marketing Guidebook** focuses on ways in which you can market your plans before, during, and after a pet owner visits your practice. [Click the link](#) to review opportunities to highlight your plans inside and outside your practice through:

- ☐ Printed media
- ☐ In-person and phone conversations
- ☐ Social media
- ☐ Email newsletters
- ☐ Your practice website
- ☐ Push notifications and text message campaigns
- ☐ Direct mail campaigns

 **Best Practice Tip:** Visit www.petlyplansmarketing.com to review any ongoing promotions, peruse our offerings, and place an order today.

Making Plans a Part of Your Workflow

Building a well-defined plan enrollment workflow is another key practice area to teach your staff. 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. [Click this link](#) to download and utilize the **Petly Plans Workflow Guidebook**. In this next resource, 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
- ☐ Making preventive care discussions a part of ongoing staff meetings

Goals and Incentives

Setting goals and 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. [Click here](#) to download the **Goals and Incentives Guidebook** and watch our 5-minute video snippet for a quick overview on the importance of setting goals.

Topics within this asset include:

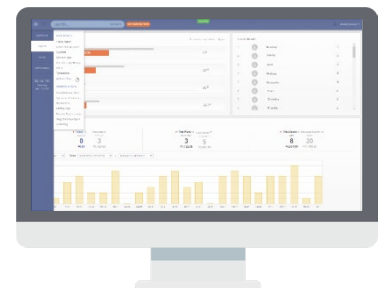
- ☐ Purpose and Importance of Goals and Incentives
- ☐ Unify Your Team
- ☐ Goal Setting Worksheet
- ☐ Goal Tracking and Resources
- ☐ Incentive Examples
- ☐ Self-Evaluation



Reports

Petly Plans offers a robust selection of preset reports that are designed to help you manage your 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. [Click here](#) to review the **Petly Plans Reports Guidebook**. Topics included in this asset:

- ☐ Potential payment issues report
- ☐ Outstanding payments report
- ☐ Transaction settlement statement report
- ☐ Hospital fees report
- ☐ Unaddressed item over-usage report
- ☐ Unaddressed and unmatched item usage reports

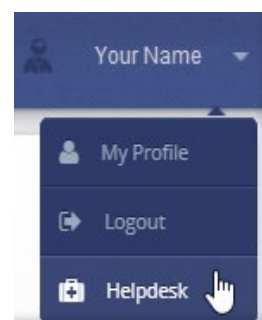


Renewals and Retention

Successfully managing plan renewals helps protect plan revenue and increase client retention. The **Petly Plans Renewal Guidebook** introduces tools and automated features inside the Petly Plans software designed to help save your staff time. [Click here](#) to learn how to manage renewals and retention in Petly Plans. We'll also take an in-depth look at:

- ☐ Running a renewal report
- ☐ Manually configure a renewal
- ☐ Reviewing plans paid in full
- ☐ Reviewing plans with add-on items
- ☐ Renewal status by type
- ☐ How plan changes impact renewals





Additional Resources

Make sure your team is familiar with the [Petly Plans Helpdesk](#) and the many resources available within it. We've included some quick links for you below.

- [Staff Training](#)
- [Administrator Training](#)
- [Staff Scripts](#)
- [Petly Plans Playbook](#)
- [Practice Success Series Recorded Webinars](#)
- [Frequently Asked Questions](#)

Still have questions? Contact the Petly Plans Support Team by calling **844-878-3738** or emailing support@petlyplans.com.

