

Petly Plans: Workflow Guidebook



Purpose

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 guidebook 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.



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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 dentals, 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 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.





Use Marketing to Save Time at Enrollment

Savvy use of digital and print media will automate your process and save your staff time. Below is a list of suggestions you can incorporate in your day-to-day workflow to generate interest and streamline the process of enrolling pets in plans.

- ☐ Display signage that alerts clients of your plan offerings *before they enter your practice!* The Petly Plans [marketing website](#) offers a wide variety of customizable options, including banners, lawn signs, parking signs, sandwich boards, and posters to ensure messaging about plans is consistent both inside and outside your facility.
- ☐ Laminate copies of your brochures, along with sample estimates, that can easily be sanitized between uses.
- ☐ Create a pre-enrollment form and add it to your practice website so interested clients can choose a plan online before the visit. This will save time during the enrollment process. Check out our [example pre-enrollment form](#) designed with JotForm.
- ☐ Visit the [Marketing Section of the Petly Plans Helpdesk](#) for more guidance on marketing your plans.



Making Plan Enrollments a Part of Your Workflow

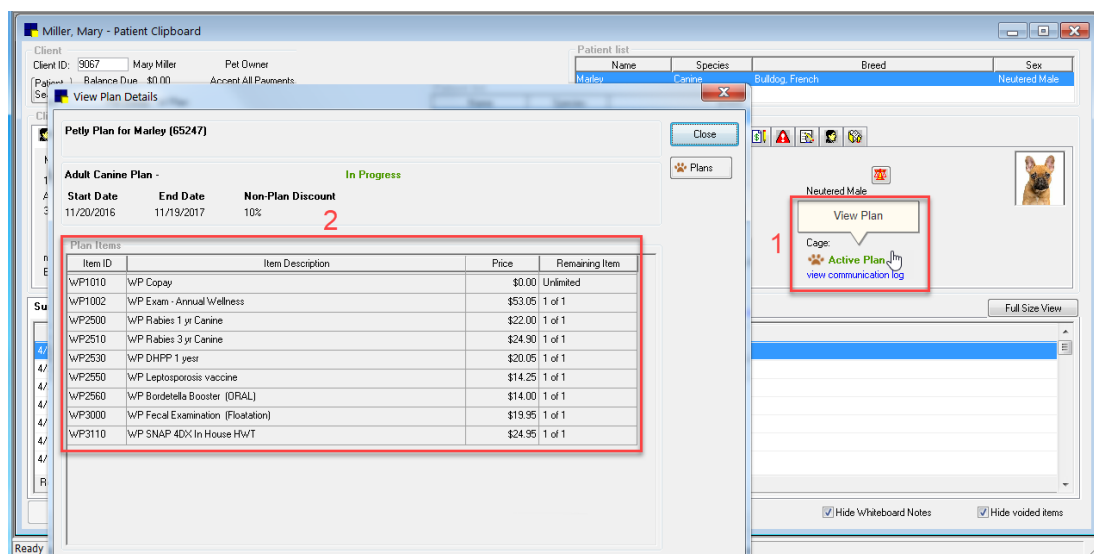
The key to your success will be making sure your entire team is working in unison toward a common goal. To accomplish this, all staff must promote plans daily. In this next section are a list of activities we suggest your staff members perform before, during, and after each visit.

Before the Visit:

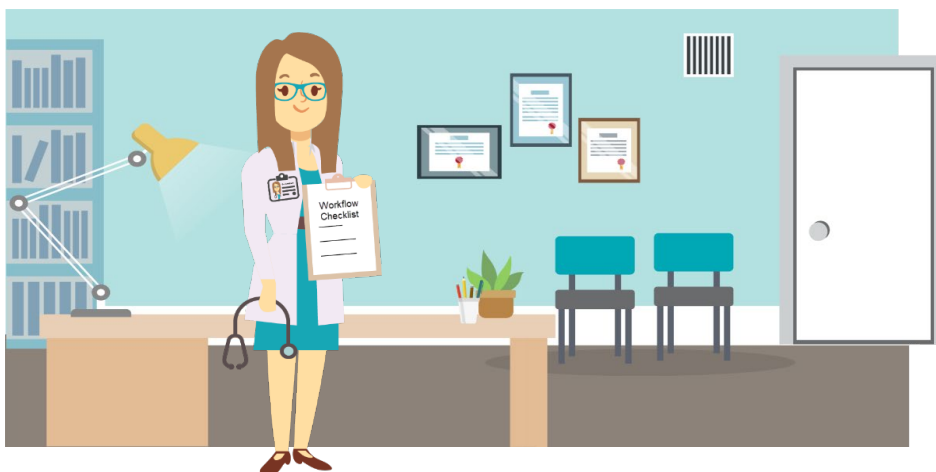
□ Identifying Opportunities to Enroll New Plans

- 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, 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](#) for inspiration.

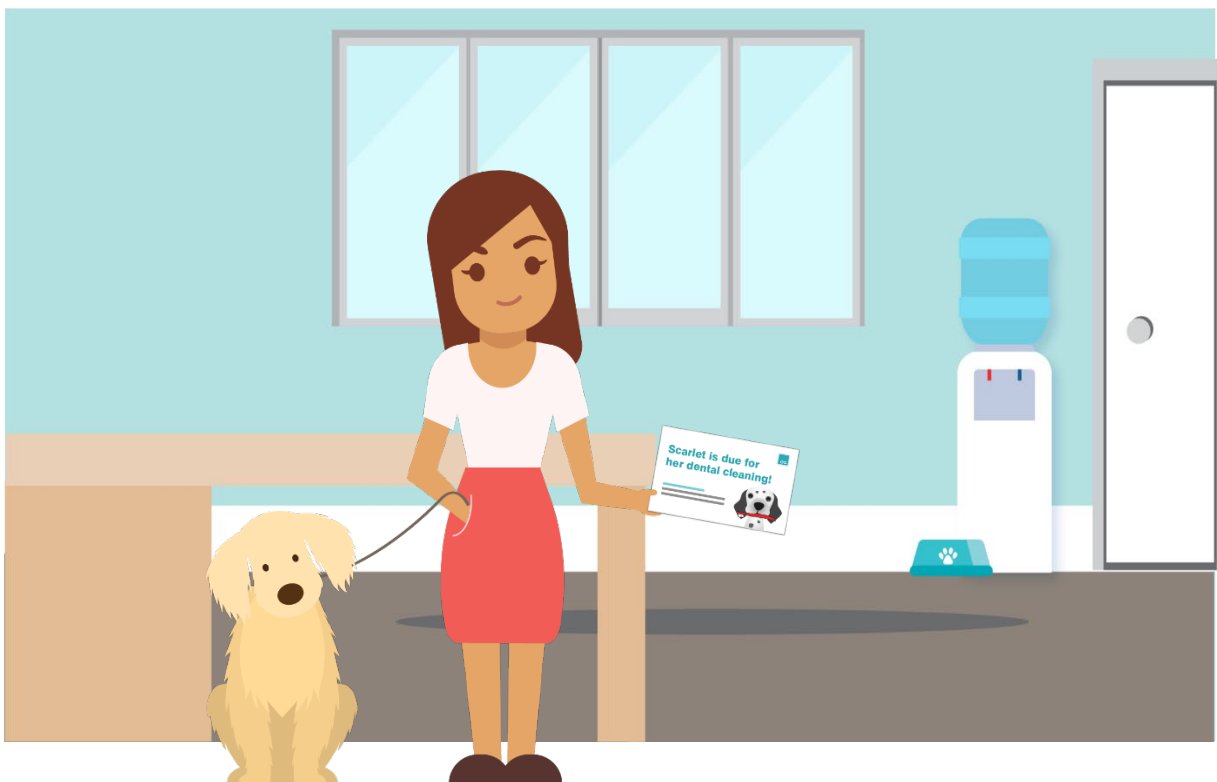


□ Booking Appointments

- 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 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 the receptionist.



During the Visit:

☐ Check-In

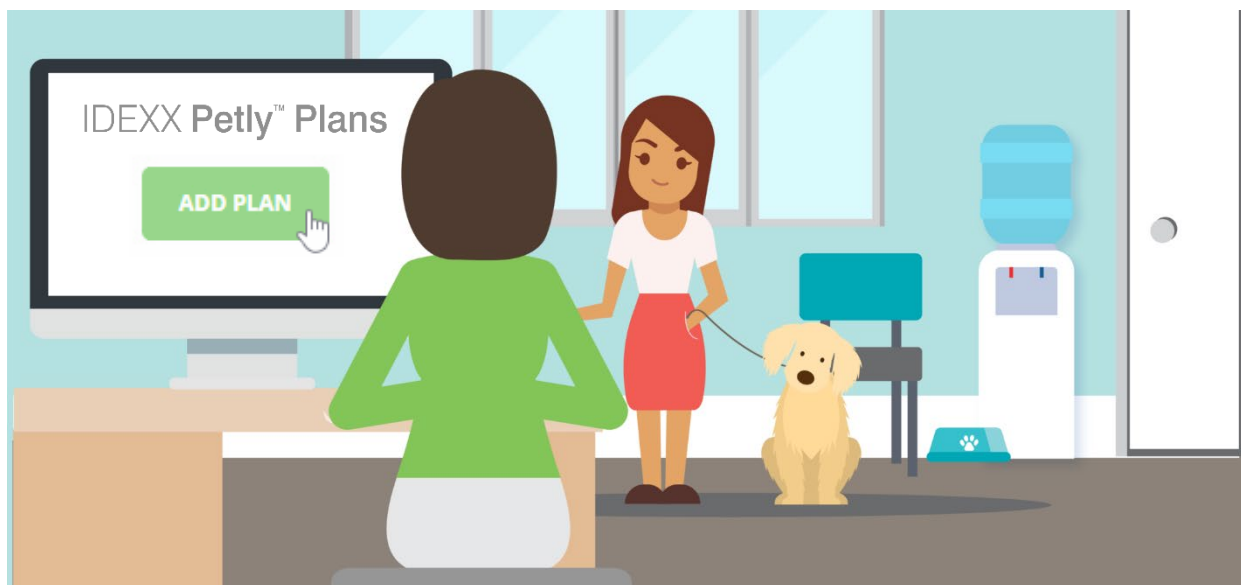
- ☐ Getting the client and the patient settled into the waiting area or exam room is an opportunity to provide a brochure (printed or digital). The pet owner may even have questions regarding plan offerings and pricing before the doctor performs the exam.

☐ 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.



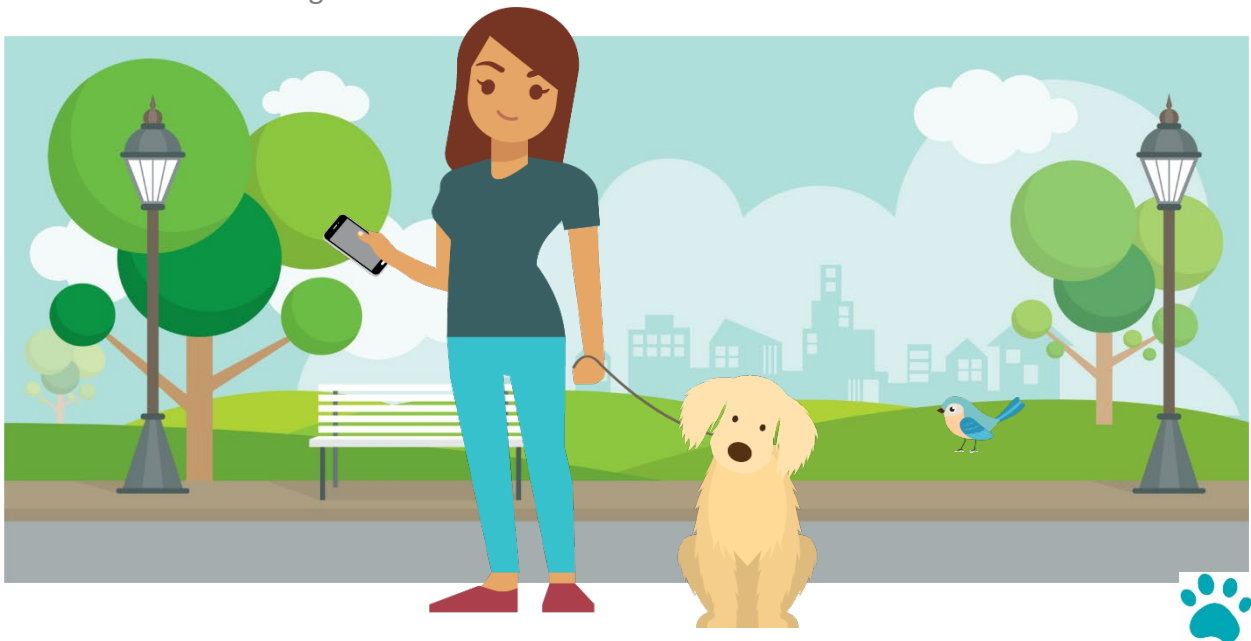
Check-Out

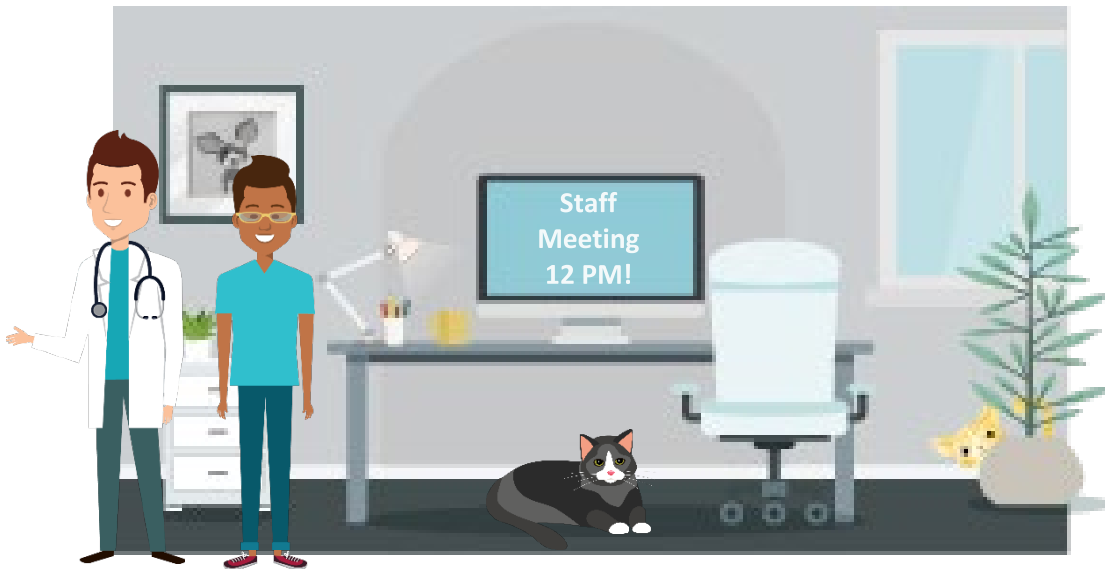


- ☐ Provide canned estimates prepared ahead of time comparing plan vs. non-plan pricing for the visit or for future recommended services. For example, during an exam, the doctor recommends that the client schedule a dental. Provide the pet owner with an estimate, showing the cost of the dental to be 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.

Feeling comfortable talking about plans is essential in day-to-day staff activities. Reviewing the [Pet Owner FAQ's](#) will help staff feel more confident fielding basic questions and handling objections when they arise.

 *Best Practice Tip:* We also suggest downloading and reviewing the [Staff Scripts](#) from the 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.

Additional Resources

Make sure your team are familiar with the different types of resources available on the Helpdesk. We've included some quick links for you below.

- [Pet Owner FAQ's](#)
- [Tools for Success Guidebook](#)
- [Staff Scripts](#)
- [Practice LIFE website](#)
- [Reports Guidebook](#)
- [Marketing to Your Pet Owners](#)