**Staff Scripts: plan cancellations**

There are a number of reasons why a client might choose to cancel a plan, or not renew their plan for the next year. But one thing’s for sure: equipping your team with a talk track can help them clearly articulate the value a plan brings to your clients and patients, and help protect your preventive care plan business.

Feel free to use this guide as-is, or edit it to make it your own!

* First, understand why the client wants to cancel their plan. It may be a reason that is outside of your control, such as an address change or deceased patient. In that case, it’s best to simply process the cancellation.
* If a client is cancelling their plan for reasons that are within your control, it could be that they no longer see the value of the plan. In these situations, dig deeper to uncover the objection and try to save the plan.

You may hear the following objection from clients:

* **“I’ve been paying for a plan and no longer want these monthly payments”**
  + Staff response: “Dr. [insert vet’s name] recommends that [insert pet name] receive all of the services included in your plan each year. This is to ensure [insert pet name] receives the best possible care and to try and catch health conditions early so that [insert pet name] remains as healthy as possible. If you’d prefer, we can change your plan structure to one-time annual payment, if monthly payments are not working for you.”

If the issue isn’t really about monthly payments, you may hear:

* **“I’m paying for a service(s) I’m never going to use”**
  + Staff response: “All of the services included in your plan are what Dr. [insert vet’s name] recommends for baseline preventive care. If you don’t anticipate using all of the plan items, we can change your plan to a different type when it comes due for renewal. Also, here at [insert practice name], we offer membership perks that you’re only eligible for as a plan member, including [list perks, including any non-plan item discounts].”

Or, if a client is cancelling an upcoming renewal, they might say:

* **“My plan is renewing, but I didn’t use everything last year, so I’m cancelling”**
  + Staff response: “I’m sorry that [insert pet name] wasn’t able to take full advantage of [his/her] plan last year. We want to make sure that [insert pet name] is getting all of the most important services needed to live a healthy, happy life. Since [he/she] did not receive all those services last year, it’s more important than ever to get time on the calendar for Dr. [insert vet name] to see [him/her]. Let’s get time on the calendar and reassess if a plan still makes sense for [insert pet name] with Dr. [insert vet name].”

In all of these examples, it’s important to reiterate the value of plan items and membership perks. You can always try to schedule an appointment with the veterinarian to talk about options and recommendations for ongoing care.