

Easy-to-use  
plan creation tool



# Tools for success

PETLY PLANS

# Introduction

Communication is key to creating pet owners' interest in your preventive care plans.

This booklet was designed to help your team better communicate the benefits and value of your plan offerings to pet owners. Enrolling pets in plans will improve pet owner loyalty and enable you to deliver an even higher quality of preventive care. A healthy pet is a happy pet!

In addition to this booklet, Petly Plans provides a variety of tools and resources that can be used throughout your practice to help your team successfully offer plans. This content can be accessed on the [Petly Plans Helpdesk](#).

## INDEX

|   |    |
|---|----|
| <a href="#">Talk about plans</a> .....                      | 3  |
| Make Petly Plans part of your day ( <i>6-step process</i> ) |    |
| Enrolling new puppies and kittens ( <i>script</i> )         |    |
| Enrolling adult dogs and cats ( <i>script</i> )             |    |
| Increase dental compliance ( <i>script</i> )                |    |
| <a href="#">FAQs</a> .....                                  | 16 |
| <a href="#">Pet owner objections</a> .....                  | 19 |
| <a href="#">Set goals</a> .....                             | 21 |
| <a href="#">Marketing</a> .....                             | 22 |
| Guide to success  |    |
| <a href="#">Additional support</a> .....                    | 23 |



This icon indicates hyperlinked text.



# Talk about plans

## Make Petly Plans part of your day!

You can think of preventive care plans as a simple conversation you're having with your pet owners. Use the following 6-step process to help guide your interactions. Everyone plays a part in this workflow! When pet owners hear a consistent recommendation from the entire medical team, it reinforces the value of a plan.



### 1. Introduce plans on the phone

Talk about your plans when scheduling and confirming appointments. If the pet is not enrolled in a plan, ask the pet owner if they have heard about your preventive care plans. Plant the seed that plans are available. If the pet is enrolled, look at the plan to see what items are available and make this part of the visit.



### 2. Set your appointments up for success

Review your schedule for wellness or new kitten/puppy appointments and ask those pet owners to arrive a few minutes early so you can provide more information about your plans. Include a note in appointments when you've had a conversation about plans so other staff members are aware.



### 3. Give pet owners a brochure at check-in

Hand the pet owner a brochure when they check in at the front desk so they can look it over while waiting for their appointment. This can (and should be) a quick exchange!



### 4. Make a plan recommendation

Educate the pet owner on preventive care and how it helps their pet. Think about the pet and the plan that will best fit their needs. Is the pet a puppy or kitten? Does the pet show signs of dental disease? Recommend the best plan option and let the pet owner know.



### 5. Team effort

Everyone plays a part! Let the doctor know what plan you have recommended so they can reinforce this plan during the visit. The doctor may even decide to add additional items to the plan based on the pet's needs.



### 6. Complete enrollment

Enroll patients upon checkout to make this a smooth process for the pet owner, patient, and your practice.



Print a [pet owner FAQ](#) and customize for your pet owners.



# Talk about plans

Offering preventive care plans means talking to the pet owner about the best plan for their pets. We've developed talk tracks and scripts to help your entire team feel comfortable talking about Petly Plans. You can find all these resources on the [Petly Plans Helpdesk](#) .

## Practice with your team.



**Host staff meetings:** Make Petly Plans a topic in your staff meetings.

**Role play:** Gain confidence through role-playing on how to talk about Petly Plans.

**Play your part:** It's everyone's job to educate pet owners on their payment options, and plans are just another option. Don't think of it as selling; think of it as providing a solution to potentially cost-prohibitive bills. Plus, you can provide the best standard of care to all pets that visit your practice!

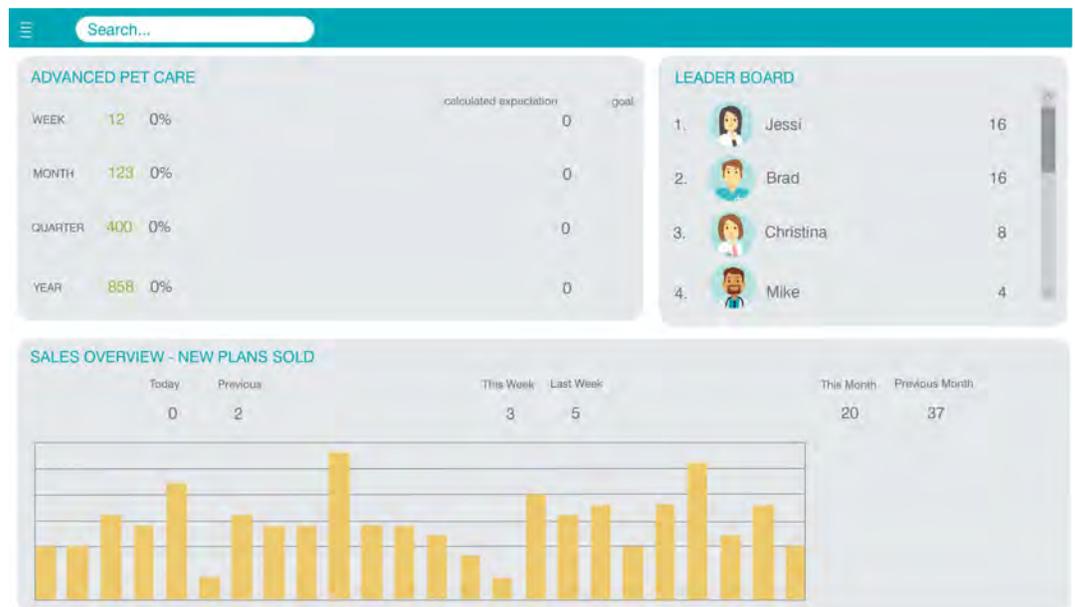
It is important to work as a team so everyone builds confidence when it comes to offering Petly Plans.

## Track your performance!

### Leader board:

Your Petly Plans dashboard will display hospital goals and leader board sections if the performance tracking feature is turned on.

View points earned by each staff member and across the full team so you can track and reinforce your goals.



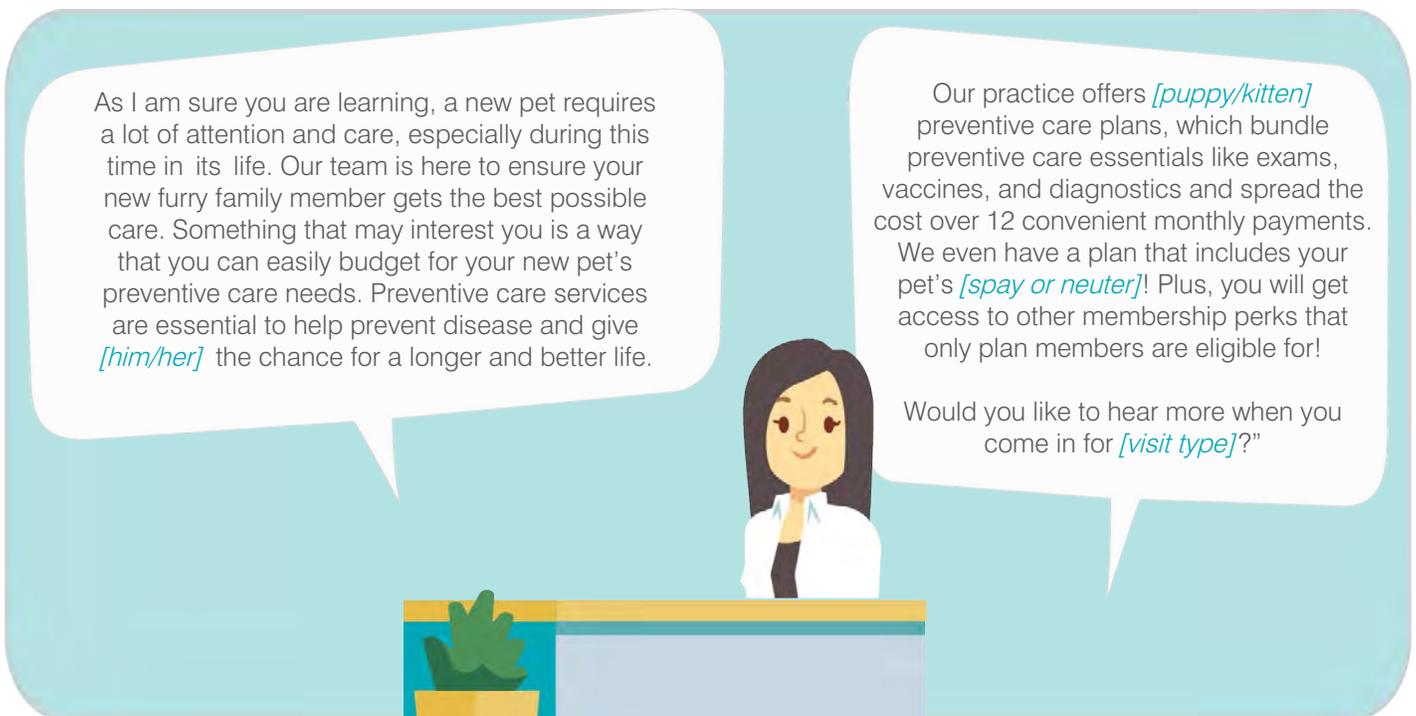
# Scripts

## Scripts for enrolling new puppies and kittens

Use this script for conversations with puppy and kitten owners about your practice's preventive care plans.

**Who?** Reception staff

**When?** A pet owner calls in to schedule a new puppy or kitten appointment, or to price shop.



*If they say...*



Great! I will let the team know. We look forward to seeing you and [pet's name] on [date and time of appointment]!



Okay, we look forward to seeing you and [pet's name] on [date and time of appointment]. And please let us know if you would like to revisit our preventive care plans in the future. You can enroll anytime.

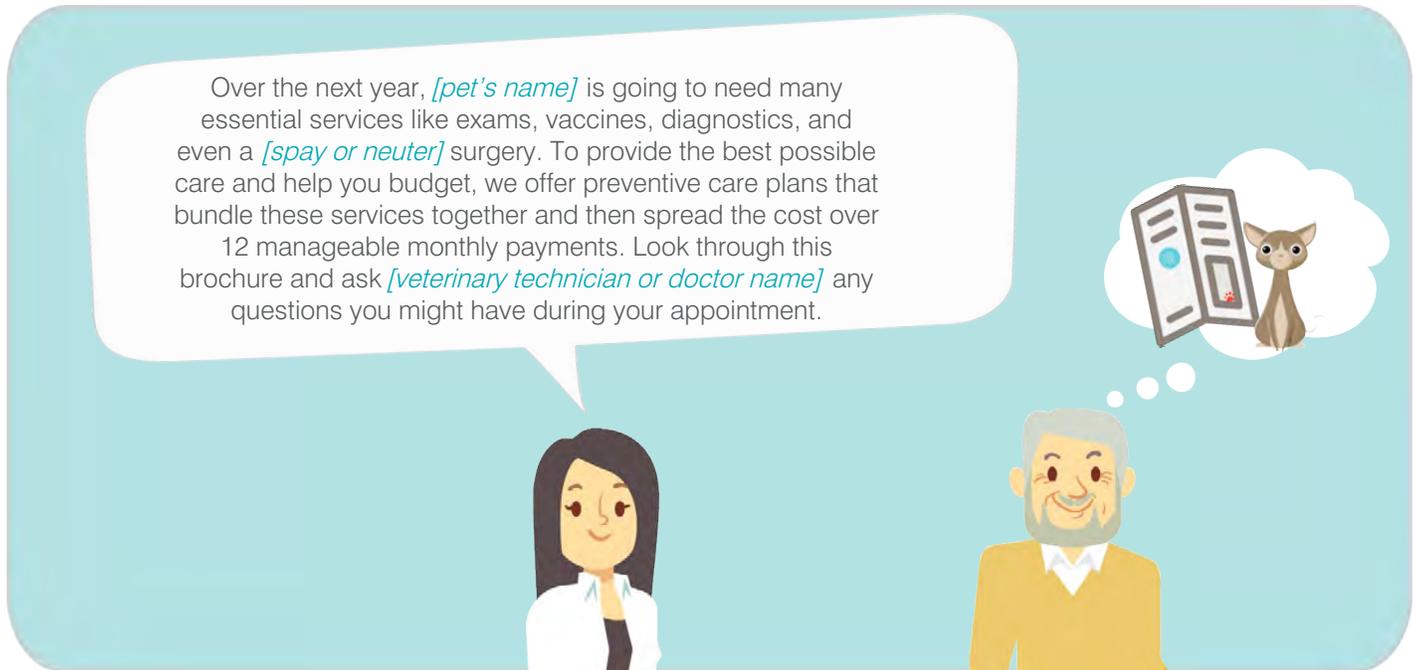


Make a note in the appointment such as "Petly Plans interested" or "Not interested in Petly Plans" so the rest of your team knows that the conversation has taken place.

## Scripts for enrolling new puppies and kittens

**Who?** Reception staff

**When?** A new puppy or kitten owner checks in for their appointment.

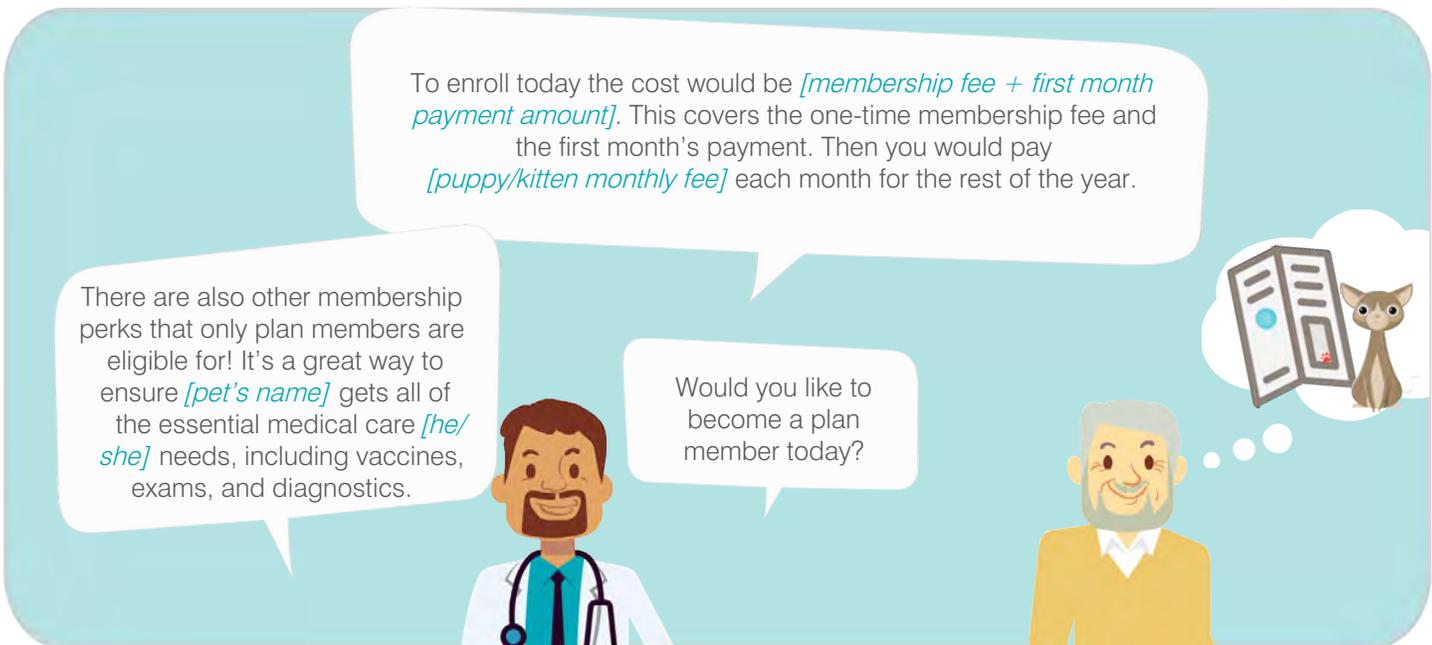
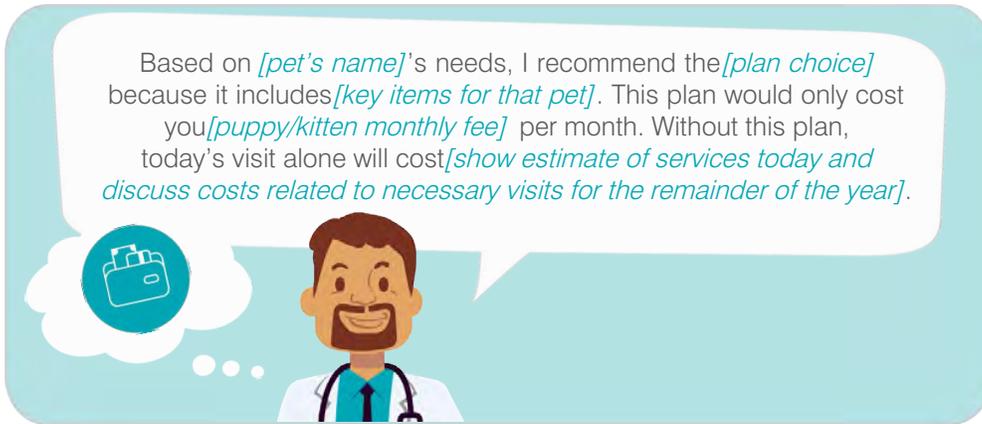
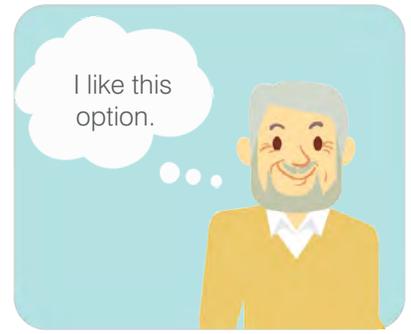


Your notes...

## Scripts for enrolling new puppies and kittens

**Who?** Medical team

**When?** During the appointment/  
in the exam room



If they say...



Great! Let's enroll *[pet's name]* in a plan today.

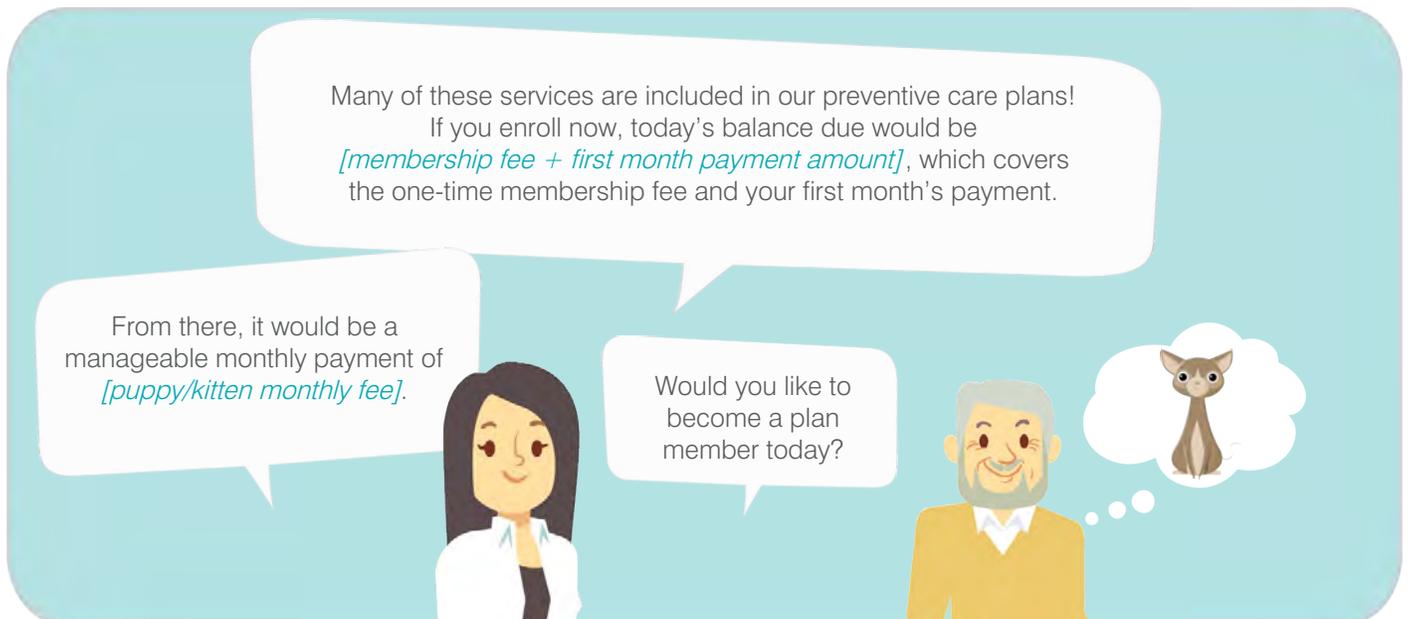


We will be seeing you a few times this year, so please let us know if you decide to enroll *[him/her]* during a future visit. You can enroll anytime. It's important to remember that the program only covers future services and can't cover past visits.

## Scripts for enrolling new puppies and kittens

**Who?** Reception staff

**When?** A new puppy or kitten owner checks out after their appointment but hasn't decided if they would like to enroll.



*If they say...*



Great! Let's enroll *[pet's name]* in a plan today.



Okay, you can enroll anytime. It's important to remember that the program only covers future services and can't cover past visits.



Your notes...

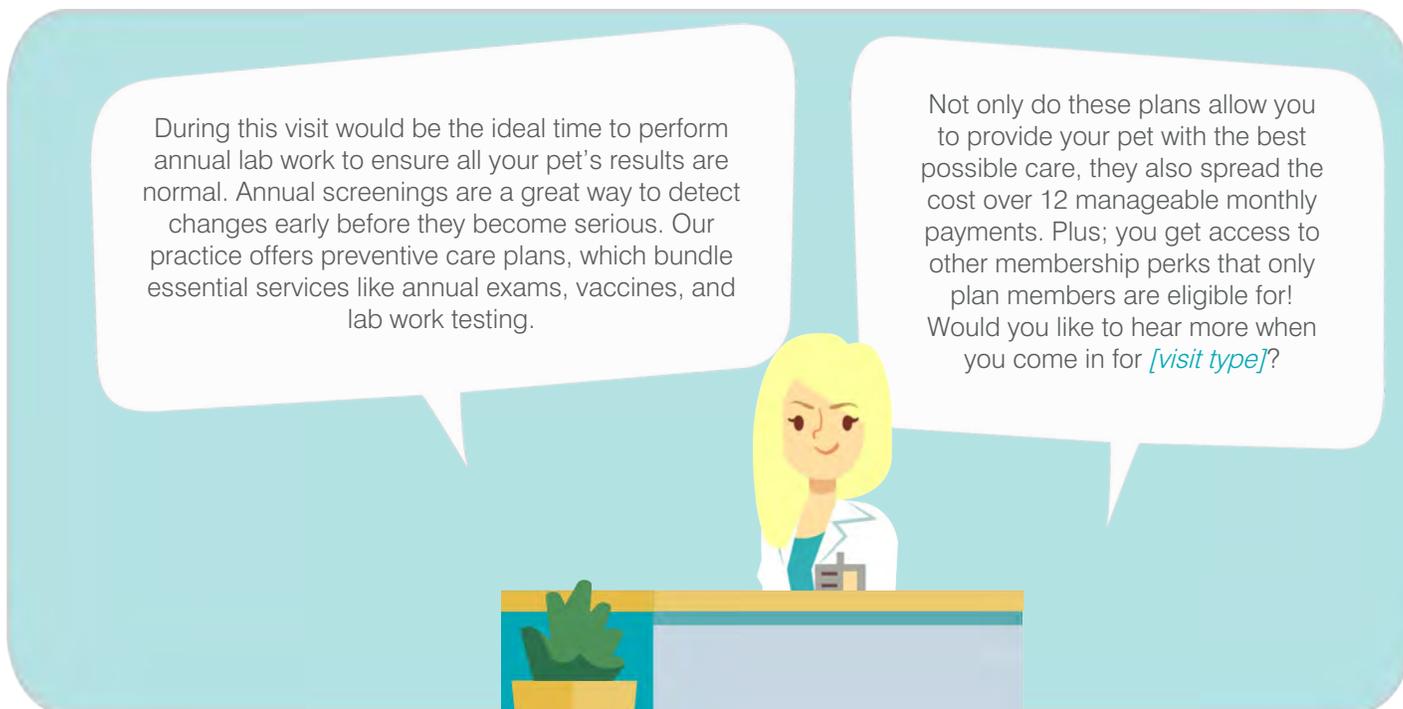
# Scripts

## Scripts for enrolling adult dogs and cats

Use this script for conversations with pet owners about your practice's preventive care plans.

**Who?** Reception staff

**When?** A pet owner calls in to schedule their pet's wellness appointment and/or vaccines



*If they say...*



Great! I will let the team know. We look forward to seeing you and *[pet's name]* on *[date and time of appointment]*.



Okay, we look forward to seeing you and *[pet's name]* on *[date and time of appointment]*. And please let us know if you would like to revisit our preventive care plans in the future. You can enroll anytime.

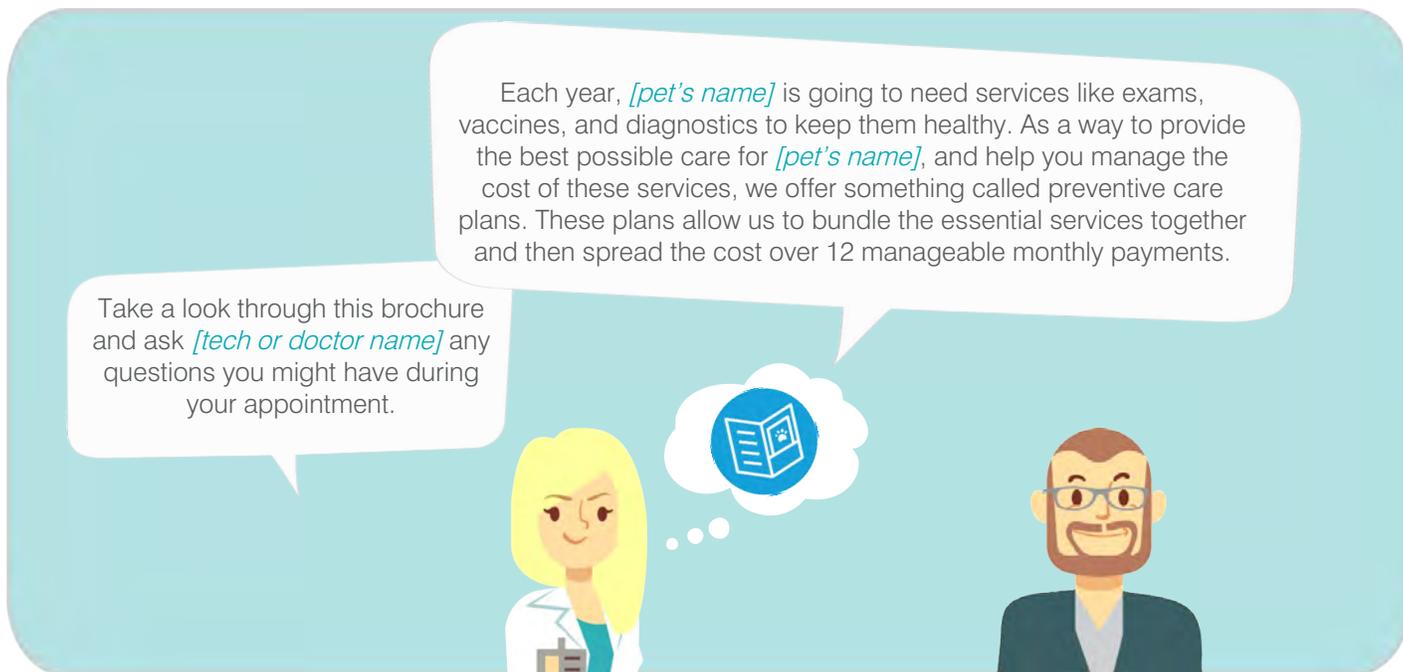


Make a note in the appointment such as *"Petly Plans interested"* or *"Not interested in Petly Plans"* so the rest of your team knows that the conversation has taken place.

## Scripts for enrolling adult dogs and cats

**Who?** Reception staff

**When?** A pet owner checks in for their pet's wellness appointment.

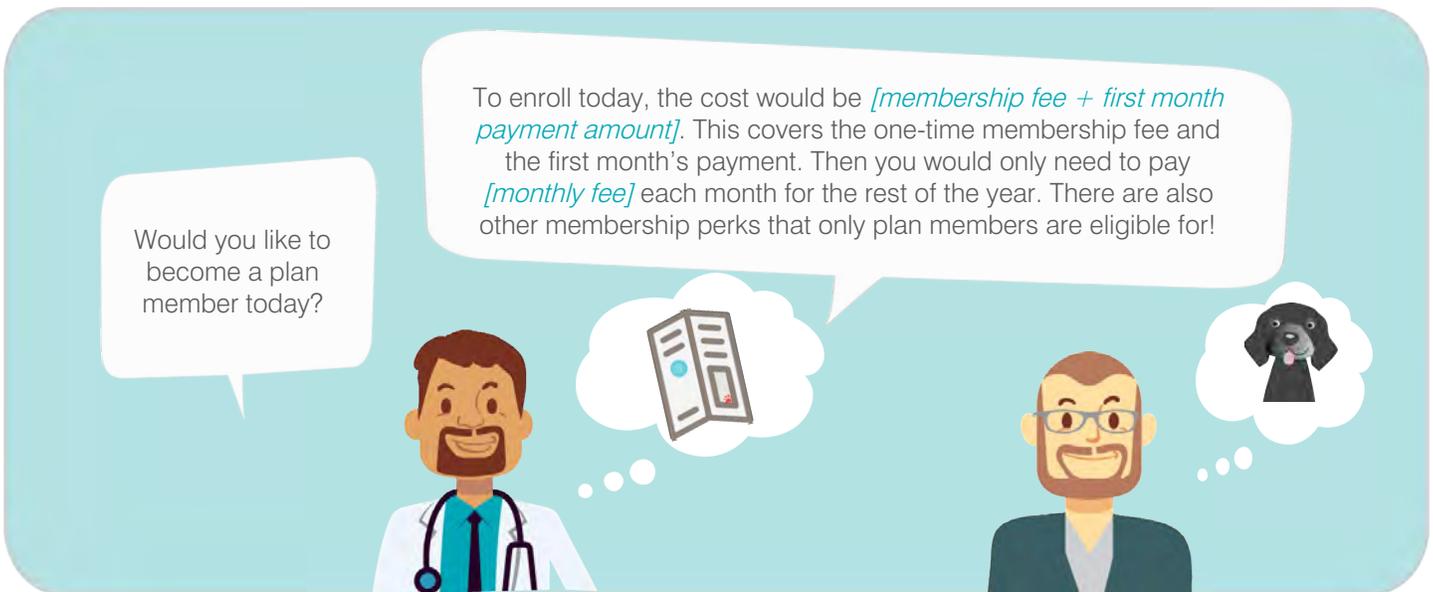
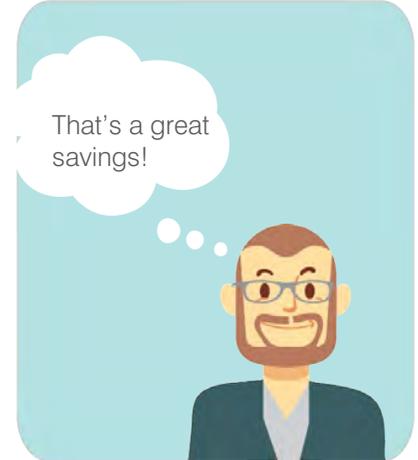
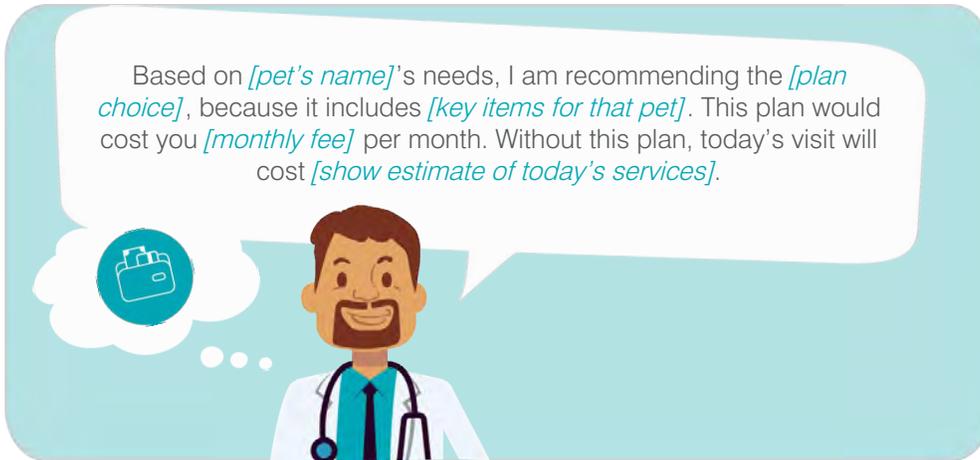


Your notes...

## Scripts for enrolling adult dogs and cats

**Who?** Medical team

**When?** During the appointment/  
in the exam room



*If they say...*



Great! Let's enroll *[pet's name]* in a plan today.

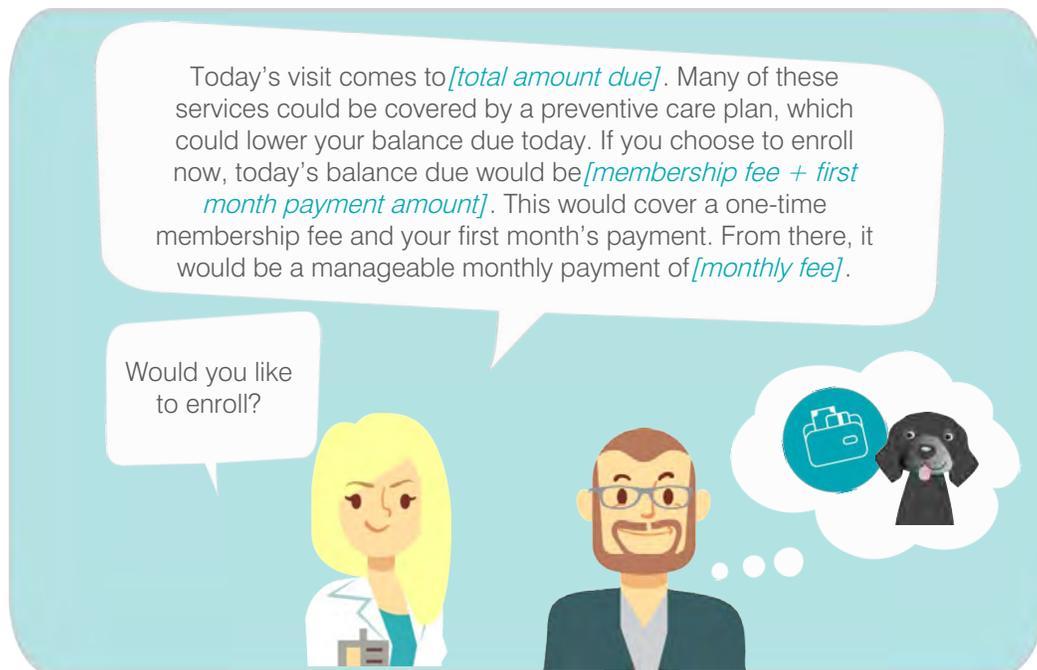


Okay, you can enroll anytime. It's important to remember that the program only covers future services and can't cover past visits.

## Scripts for enrolling adult dogs and cats

**Who?** Reception staff

**When?** A pet owner checks out after their appointment but hasn't decided if they would like to enroll.



*If they say...*



Great! Let's enroll *[pet's name]* in a plan today.



Okay, you can enroll anytime. It's important to remember that the program only covers future services and can't cover past visits.



Your notes...

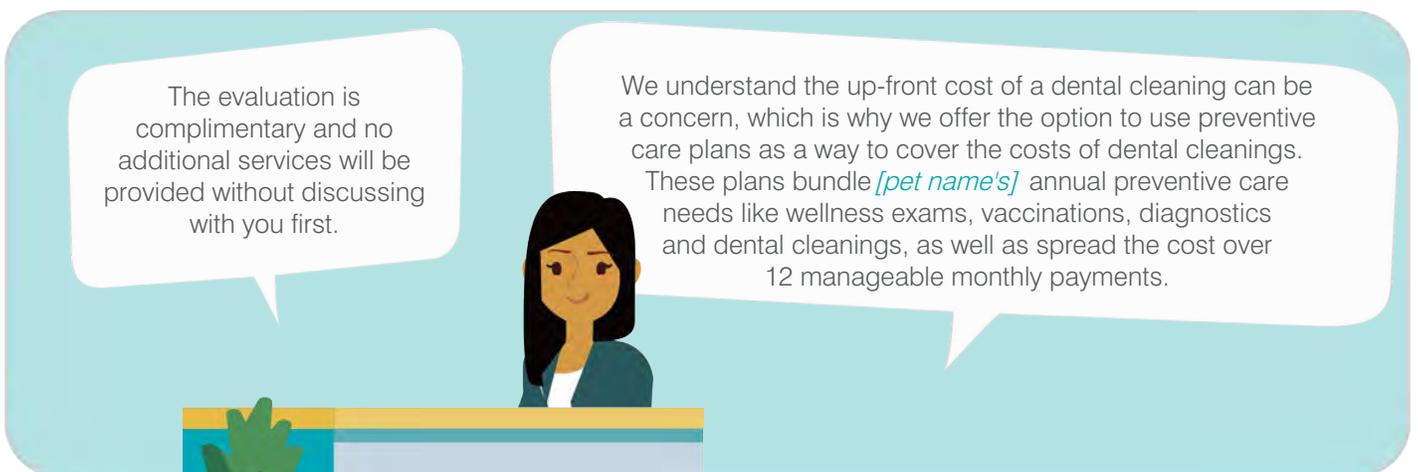
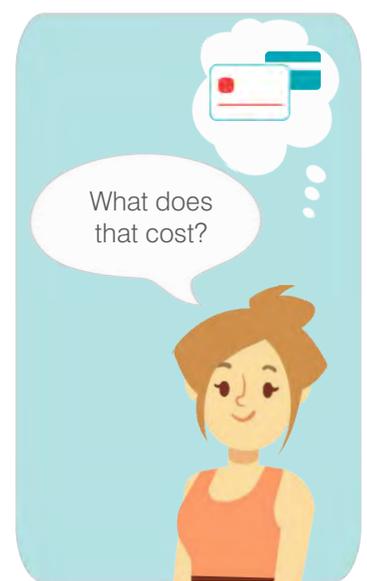
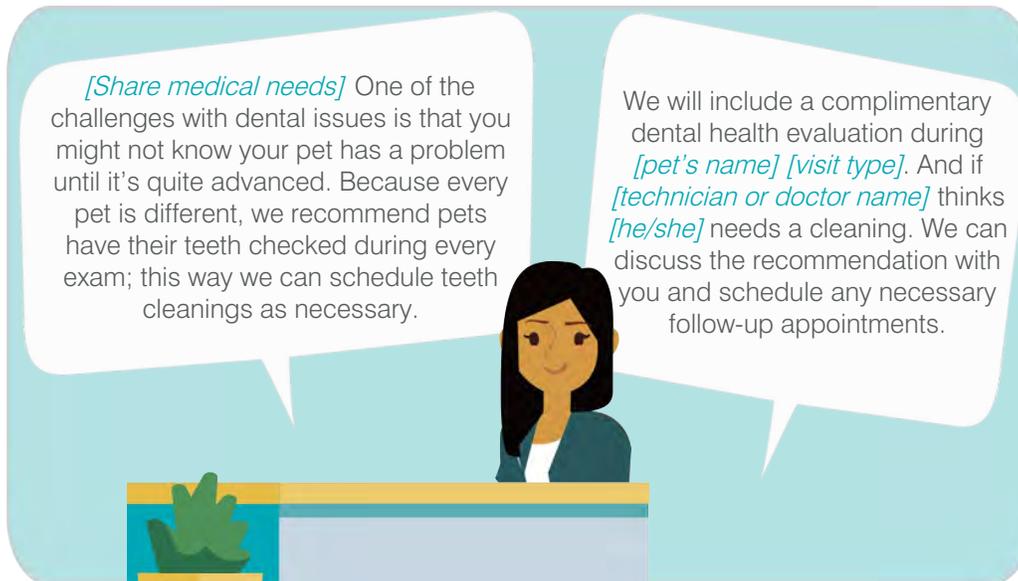
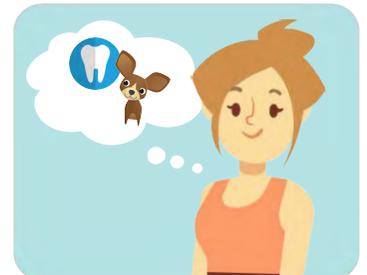
# Scripts

## Scripts to increase dental compliance

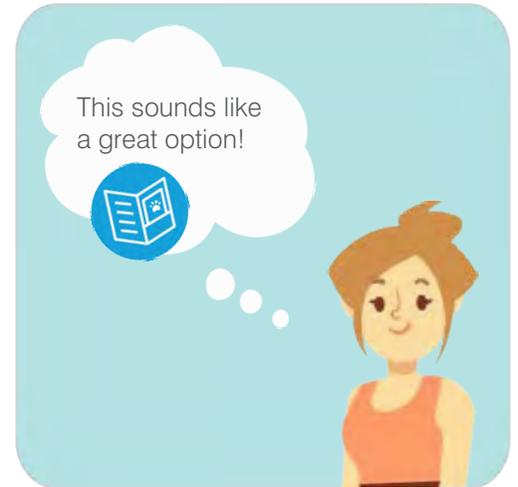
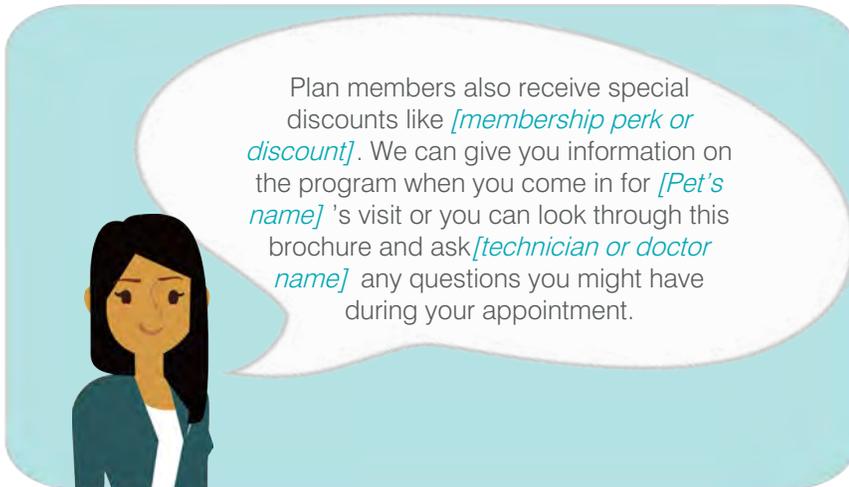
Use this script to educate pet owners about the importance of dental care and how your preventive care plans can help reduce the financial impact of paying for a dental cleaning.

**Who?** Reception staff

**When?** A pet owner calls to schedule an appointment for their pet or checks in.



## Scripts to increase dental compliance

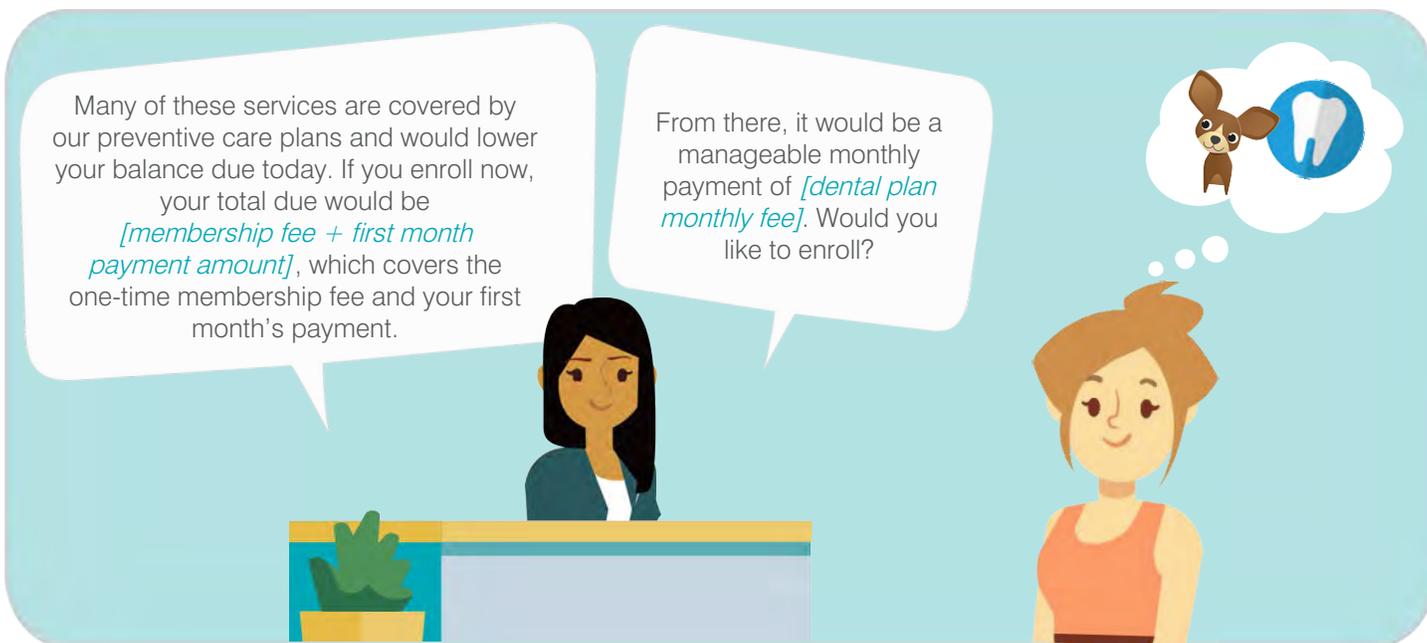
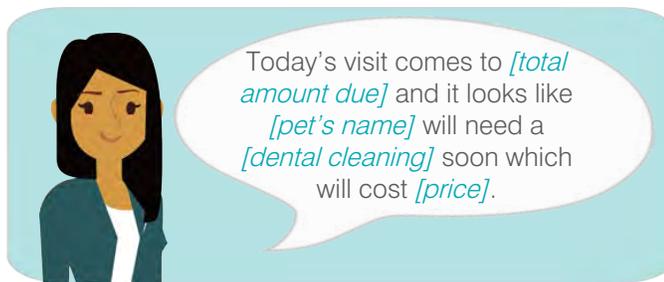


Your notes...

## Scripts to increase dental compliance

**Who?** Reception staff

**When?** A pet owner checks out after the appointment and has not indicated interest in enrolling in a plan.



*If they say...*



Great! Let's enroll *[pet's name]* in a plan today then!



Okay, you can enroll anytime. It's also important to remember that the program only covers future services and can't cover past visits.



Your notes...

# FAQs



Below is a list of common questions about preventive care and the Petly® Plans software.

## Preventive care



Print a [pet owner FAQ](#) and customize for your pet owners.

**Q:** **What is preventive care?**

**A:** Preventive care seeks to prevent illness through regular examinations, vaccinations, screenings, and other medical procedures so you have information about the pet's body, organs, and overall health. Regular, thorough examinations and measurement changes in a pet's health can help detect issue earlier, and treatment can begin sooner to avoid care becoming costlier in the future. This approach to pet healthcare is called preventive care.

**Q:** **What are [Petly Plans](#)?**

**A:** Petly Plans are affordable monthly payment plans for pets' preventive care services. These plans were created by your veterinarians to help pet owners have convenient and affordable preventive care for their pets. Petly Plans allow your pet owners to make monthly payments and avoid paying for services in a lump sum.

## Enrollment requirements

**Q:** **What does a pet owner need to [enroll their pet in a wellness plan](#)?**

**A:** A pet owner will need to present a driver's license and two forms of [payment](#):

 Checking account (must provide routing number and account number)

 Major credit or debit card

**Q:** **What if the pet owner doesn't have two forms of payment?**

**A:** Contact management. They may be able to authorize enrollment with only one form of payment until the pet owner can provide a second form of payment.

**Q:** **What is the initial membership fee?**

**A:** The initial membership fee is a one-time fee that is collected from the pet owner on the day of enrollment along with the first month's payment.

**Q:** **How much will the pet owner be expected to pay when enrolling their pet in a plan?**

**A:** They will be responsible for paying the initial membership fee and the first month's payment in order to enroll in a plan.

**Q:** **Does the pet owner get a discount for enrolling multiple pets?**

**A:** If your practice offers a multiple-pet discount, then input your discount during the enrollment process.



## Plan services

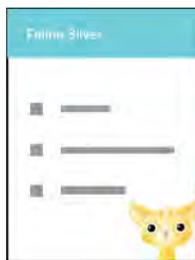


**Q:** Can any services performed prior to enrollment be covered now?

**A:** No, only services that were performed during today's appointment can be included as part of a plan. Services from previous appointments are not eligible.

**Q:** Can a pet owner change their pet's plan 🔄?

**A:** Yes, a plan may be upgraded if the veterinarian identifies a need for a different plan for instance, if the pet needs a dental cleaning. A plan can be downgraded only at the time of renewal.



**Q:** Do the services roll over to the next year if the pet owner does not use them within 1 year from the date of enrollment?

**A:** No, the services must be used within 1 year from the date of enrollment.

## Cancellations and discounts

**Q:** If a pet owner no longer wishes to participate in their wellness plan, can they cancel the plan 🔄?

**A:** This decision will be at the discretion of your management. Notice of [cancellation must be provided in writing](#) 📄 at least 30 days prior to the desired cancellation date. When a plan is canceled in the Petly Plans software, you will receive three cancellation options. The pet owner can either pay the remaining balance for the plan, be responsible for services rendered minus payments made to date, or cancel without any additional payments collected. The enrollment fee is nonrefundable.

**Q:** If a pet owner transfers ownership of their pet to another person, can the plan be transferred to the new owner?

**A:** No, plans are non transferable. The plan will need to be canceled under the old owner and the new owner can enroll the pet in a new plan. Pet owners can cancel their plan by notifying the practice in writing. The enrollment fee is nonrefundable.



## Invoicing

**Q:** Can we use our regular codes when invoicing a pet that is on a plan and expect Petly Plans to sync usage?

**A:** No. Wellness Plan (WP) codes have been created in your practice management software to be used only for wellness plan members when they come in for services included in their plans. Once WP codes are used on an invoice, Petly Plans will automatically sync the usage of them overnight.

**Q:** I added a new pet owner/patient in my practice management software and now I can't find them in Petly Plans to enroll. What do I do?

**A:** This means you must perform a Quick Sync in Petly Plans to sync the new pet owner or patient from your practice management software into Petly Plans. You will then be able to [search for the pet owner/patient to enroll in a plan](#) 📌.

**Q:** When does Petly Plans draft the pet owner's first automatic payment from the bank account or credit card that is on file?

**A:** The pet owner will pay the initial membership fee and first month's payment the day they enroll. Then the first automatic payment will happen on the 20th of the following month. For example: If they enroll any day in the month of June, their next payment will be due on July 20th. We will never bill a pet owner for their plan twice in 1 month.

**Q:** What do we do if a payment is declined in Petly Plans?

**A:** The hospital will be responsible for [following up with the pet owner](#) 📌 to charge another form of payment. If for some reason you are unable to collect payment, it will be up to the management to decide [how to manage the status of payments and transactions](#) 📌.

## Vaccines and emergencies



**Q:** If the patient has had vaccines waived for medical reasons, is there a plan for them, or can the available plans be modified to exclude the vaccinations?

**A:** These are package-priced plans and we are unable to remove any items from the package. If a patient has vaccinations waived, then a preventive care plan may not be well suited as there may not be sufficient value.

**Q:** Can a pet owner use any of the included services on emergency, specialty, or sick/injury visits?

**A:** These plans are designed to identify any abnormalities or changes in organ function, dental health, weight loss/gain, etc, in healthy pets to prevent disease or to detect disease in early stages to slow progression. The pet owner should consider an accident/illness insurance policy for other types of visits. Ultimately, management can make the decision whether or not to allow plan item usage outside of a preventive care appointment.

# Pet owner objections

Hearing “no” more often than “yes” when offering your plans to pet owners? The good news is that hearing “no” is normal and we have talk tracks to help you persuade the pet owner to say “yes.” When a pet owner objects to the idea of preventive care plans, it’s important to understand the hesitation. They could require additional information before becoming comfortable enrolling. Keep in mind that preventive care plans may not be intended for every pet. Here are some common objections with recommended actions.

## Changing the pet owner mindset

### **The initial membership fee is too expensive:**

Position this as a membership or loyalty program. Ensure the pet owner knows this is a one-time fee that covers membership entrance for the life of the plan and allows access to perks and discounts. Typically, the amount of savings throughout the life of the plan far exceeds the cost of the initial membership fee. Some examples are average savings per year (based on your discount on items in the plan) and discounts on non plan items, copays, complimentary nail trims, technician visits, etc. You can say “as a member of [name of your practice], you’re eligible for our special loyalty program, if you’d like to participate.”



### **Previous negative experience when enrolled in a plan at another location:**

Ensure the pet owner understands that your plans were designed by your practice and reflect your standard of care. They are flexible and include the common preventive care blood work, diagnostics, and vaccinations required for their pet.

### **Assumption that they are unable to cancel a plan:**

Ensure the pet owner they can cancel the plan in the event of unforeseen circumstances (for instance if, they move or can no longer pay for the plan). They will be responsible for the difference between services used and payments made to date upon cancellation.

### **Uneasy that payment information isn’t stored safely:**

All Petly Plans payment profiles (including credit card and bank account numbers) are securely stored in the Authorize.Net® Customer Information Manager (CIM) as soon as they are entered into Authorize.Net® secure form embedded in Petly Plans. Authorize.Net® is a subsidiary of Visa Inc. In addition, Petly Plans operates with Secure Sockets Layer (SSL) encryption by default. Lastly, the staff only has visibility to the credit card’s last 4 digits and expiration date to validate payment method once the payment profile is entered.

### **They need to speak with their significant other before enrolling:**

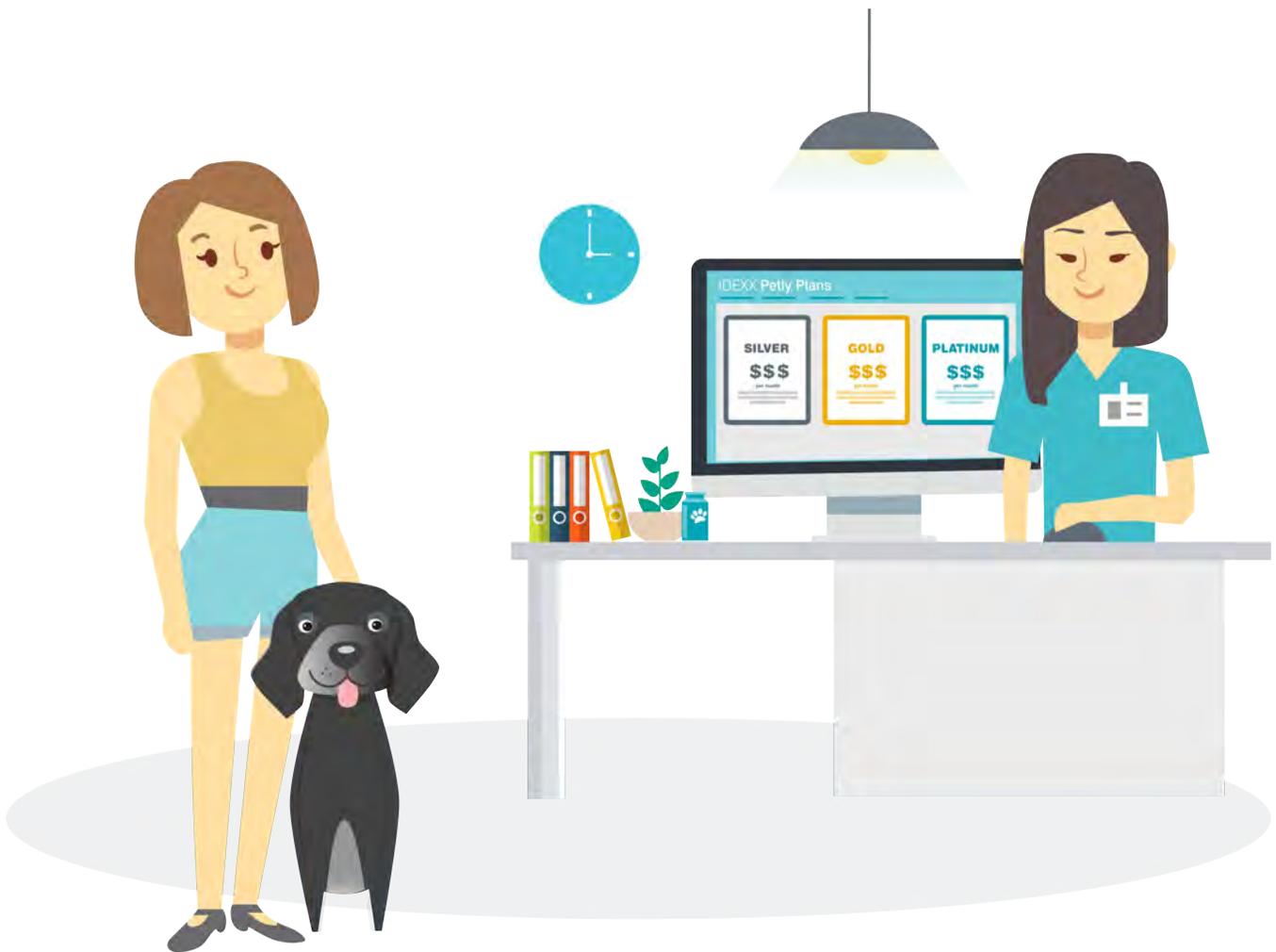
Offer them a few minutes to call and discuss this with their loved one. Provide an estimate and highlight what services would be covered in the plan if they enrolled today. Also, let the pet owner know they can enroll their pet in a plan at their next appointment if their significant other is not available when they call. Follow up with the pet owner in a week or so to see if they are still interested.

### **The pet owner confuses a preventive care plan with insurance:**

Explain that plans are designed to cover all the recommend predictable annual expenses to keep their pet healthy and spread the cost into monthly payments. The plan is not designed to cover their pet in the event of an accident or emergency like an insurance policy would.

## Indications the plan isn't the right fit:

- 🐾 The pet owner doesn't live in the same area as your practice year-round:**  
If an owner is unable to use the full benefits of the plan due to geography, a plan may not be right for them.
- 🐾 Unable to provide the required enrollment items, complete the preapproval application, two forms of payment/ID:**  
This may be an indication that the owner isn't able to make the financial commitment for plan term. Ask a member of management how to proceed.
- 🐾 Pet has a known health issue and a life span prognosis of less than one year:**  
It's important to discreetly recognize and not recommend the plan for pets who may likely pass away before the plan term is up. If the pet owner inquires, it's best to explain they wouldn't be able to receive all benefits of the plan because of their pet's condition.



# Set goals

## Set goals around enrolling pets

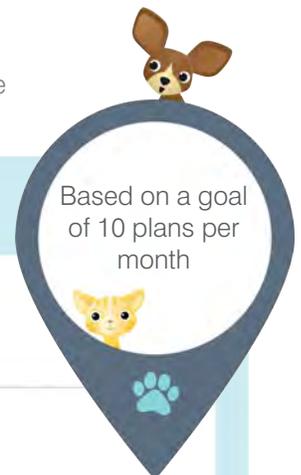
Petly Plans will help your practice reach the full potential of your preventive care plans.



We recommend that you follow these steps:

1. **Assign a Petly Plans coach/champion** to be the lead at your practice. This person will be responsible for communicating all activities around plans to your staff, including progress toward goals and staff incentive updates.
2. **Set a goal** for the number of pets you want to enroll in plans each month. The most successful practices add 2–3 new plans per doctor per week.

3. **Measure progress:** Is your practice on track to meet its monthly goal? It's easy! Just follow the [step by step guide](#) on editing your monthly and quarterly goals in the Petly Plans software.

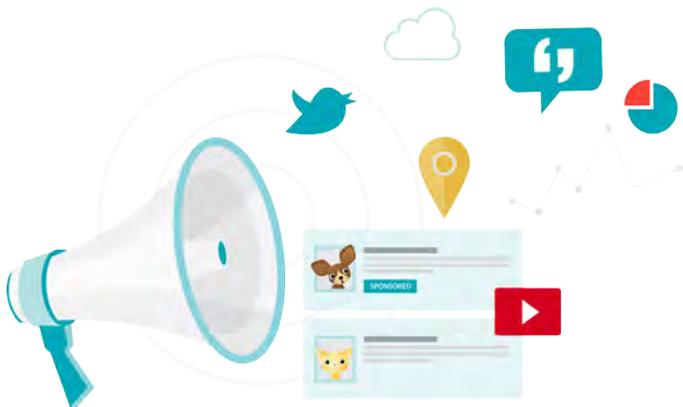
A screenshot of the Petly Plans software interface. The top navigation bar includes "ADVANCED PET CARE", "Overview", "Points", and "Goals". The main section is titled "MANAGE GOALS BY YEAR" and shows a dropdown for "2019". Below this, there's a "2019 Annual Goal" field with "480" and an "Auto Calculation" checkbox. A table below shows quarterly and monthly goals. At the bottom, there are "SAVE" and "RESET" buttons.

| Quarter 1 Goals | Quarter 2 Goals | Quarter 3 Goals | Quarter 4 Goals |
|-----------------|-----------------|-----------------|-----------------|
| 120             | 120             | 120             | 120             |
| January 40      | April 40        | July 40         | October 40      |
| February 40     | May 40          | August 40       | November 40     |
| March 40        | June 40         | September 40    | December 40     |

4. **Reward staff** by determining how they will celebrate meeting goals tied to Petly Plans enrollments. View a short video on establishing, tracking, and rewarding staff for goals with Petly Plans.



# Marketing



## Everything you need to successfully market and educate pet owners on Petly Plans

Find the materials you need to create emails, social media posts, your digital pet-owner book, and more on the [Petly Plans Helpdesk](#). You'll also find ideas for getting your whole staff involved and excited about Petly Plans.

## Offering Petly Plans

There are several ways you can educate your pet owners on the value and benefits of preventive care plans inside and outside of the practice including:

### Inside the practice

- On-hold phone messaging.
- Mention at check-in, during appointments, and at checkout
- [Distribute brochures and put up posters](#)
- Add messaging on invoices and outgoing reminder emails (click for instructions on creating a custom greeting on [AVImark](#) and [Cornerstone](#) invoices).
- Slideshow to play on exam computers and/or digital photo frames in lobby.

### Outside the practice

- Practice website
- Social media
- Email campaigns
- Postcard mailers

## Petly Plans marketing webinar

We want to help you increase awareness of your preventive care plan offerings and enroll more pets with a complete marketing plan. Check out this [15-minute webinar](#) for ideas on how to create a great marketing plan!



# Guide to success

## Building awareness about your plans is easy!

Check out this easy-to-use 8-week plan that can be adapted for longer campaigns and used on an ongoing basis. Each bullet below links to a variety of images, text ideas for social media posts, and other content to inform your pet owners you're offering plans.

### 2 WEEKS PRIOR TO LAUNCH

- Send email: "Coming soon: Easy, affordable preventive care plans!"
- Frame and hang Petly Plans posters.
- Schedule preventive care appointments.

### 1 WEEK PRIOR TO LAUNCH

- Update your practice website.
- Hold a staff meeting.
- Place scripts by phones.
- Schedule preventive care appointments.

### LAUNCH DAY

- Send email: "Enroll today: Preventive care plans are here!"
- Place Petly Plans brochures in waiting and examination areas.
- Set up digital pet-owner book.
- Post to social media.
- Launch staff contest.

### WEEK 1

- Post to social media 3 days after launch.
- Assess goals.

### WEEK 2

- Post on a weekday to social media.
- Assess goals.
- Post on the weekend to social media.

### WEEK 3

- Send email: "A quick guide to preventive care for your pet."
- Post on a weekday to social media.
- Assess goals.
- Post on the weekend to social media.

### WEEK 4

- Post on a weekday to social media.
- Assess goals.
- Hold a staff meeting with contest payout (if applicable).
- Post on the weekend to social media.

### WEEK 5

- Send email: "Be an A+ pet parent and earn a reward!"
- Post on a weekday to social media.
- Assess goals.
- Post on the weekend to social media.

### WEEK 6

- Post on a weekday to social media.
- Assess goals.
- Hold a staff meeting.
- Post on the weekend to social media.

### WEEK 7

- Post on a weekday to social media.
- Assess goals.
- Post on the weekend to social media.

### WEEK 8

- Post on a weekday to social media.
- Assess goals.
- Hold a staff meeting with contest payout (if applicable).
- Post on the weekend to social media.



# Additional support

## Give us a call!

We want to ensure that you have a successful experience with Petly Plans.

Whether you have technical questions about your Petly Plans software or need guidance on best practices, we have consultants who can help.



**Phone:** 1-844-878-3738  
Monday–Friday,  
8:00 a.m. to 5:00 p.m. ET



**Email:**  
support@petlyplans.com

Want to reorder brochures or posters?

[Marketing reorder request](#) 

Need to place your initial brochure and poster order?

[Contact us by phone or email.](#)

## Help desk resources

-  Training
-  Marketing to your pet owners
-  Reports
-  Frequently asked questions
-  And more!

# Thank you! For additional support:

Call us at 1-844-878-3738

Email us at [support@petlyplans.com](mailto:support@petlyplans.com)

