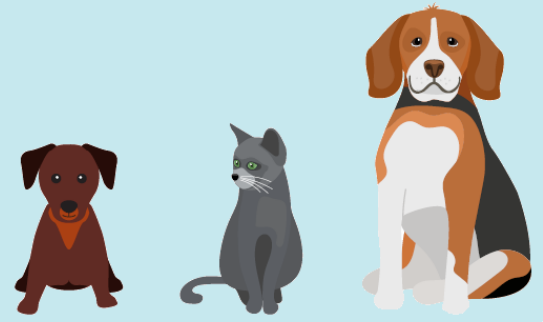


Petly Plans: Goals and Incentives Guidebook



Purpose

The purpose of this guide is to help your team understand the importance of setting goals and establishing incentives. Success is a team effort. In this guidebook, 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. In the words of John Heywood "*Many hands make light work.*"



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Assign a Wellness Plan Champion

To ensure that you're setting your practice up for success, you'll begin by establishing the roles that each of your staff members will have in supporting your wellness program.

We recommend you assign what we call a practice champion. This person will take the lead through overseeing the day-to-day management of plans, ensuring that all staff are properly trained, running monthly reporting, and delegating follow-up tasks to other team members.

Your practice champion will then identify one or two other staff members to assist with the administrative aspects of plan management, keep the workload balanced, and all activities up to date.

A practice champion is responsible for:

- Overseeing the plan enrollment workflow
- Ensures that 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



Setting 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 into 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.

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	Divide number above by 12 =
Weekly Enrollment Goal	Divide annual goal by 52 =

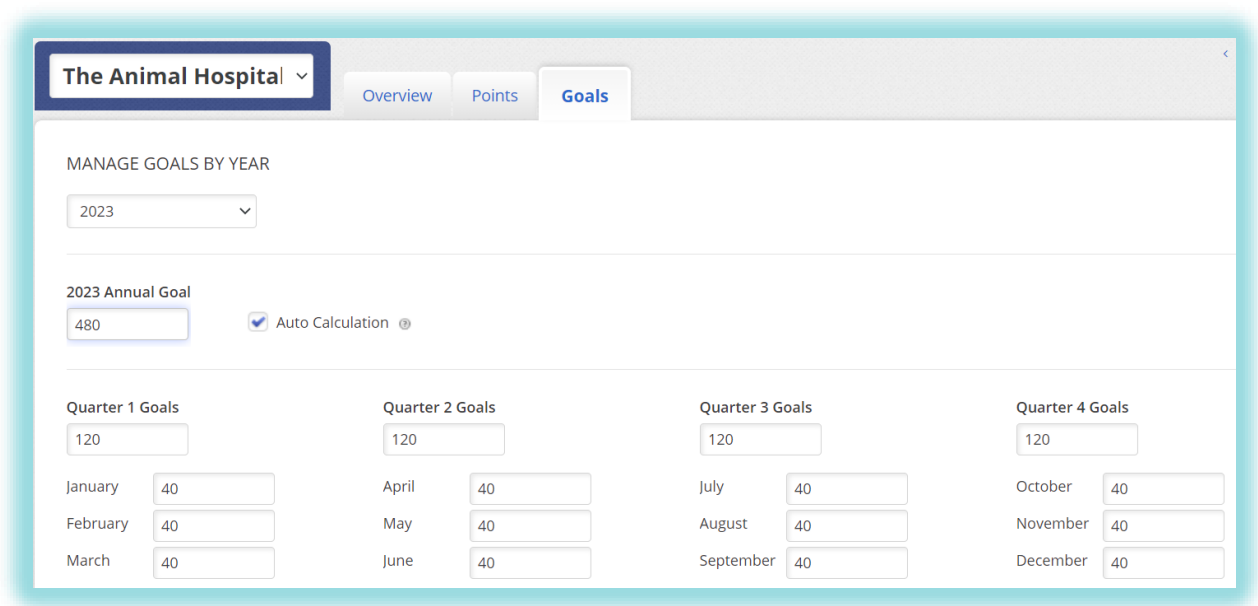
Goal: Total # of Client Visits

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



The screenshot shows the 'Goals' tab in the Petly Plans interface for 'The Animal Hospital'. It features a 'MANAGE GOALS BY YEAR' section with a dropdown for '2023'. Below this is the '2023 Annual Goal' set to '480', with an 'Auto Calculation' checkbox checked. The main area is divided into four columns for 'Quarter 1 Goals', 'Quarter 2 Goals', 'Quarter 3 Goals', and 'Quarter 4 Goals'. Each column has a total goal input (all set to 120) and a table of monthly goals (all set to 40).

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

Additional Resources

The Petly Plans Helpdesk will also play an important part of your success. This online resource contains information on all topics related to Petly Plans.

If you haven't yet familiarized yourself with the Helpdesk, check out the following links and learn more about goals and incentives.

- First, [review](#) the basics of performance goals and view a comprehensive training on [goals and incentives](#).
- [Next](#) is a detailed performance tracking overview.
- Once you have an understanding of points setup on the site, review how to [edit points for specific actions](#), [manually adding points](#), [deleting points](#), and a [points report overview](#).
- Once you have mastered goals and points on the website, continue to [assess and reassess goals](#) at a regular cadence during team meetings.

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 the two 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 above and divide by 12 =
Weekly Enrollment Goal	Divide annual goal by 52 =

Revised Goal: Total # of Client Visits

Daily Enrollment Goal	Total # of visits per day x .10 =
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Self-Evaluation: What We've Learned

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