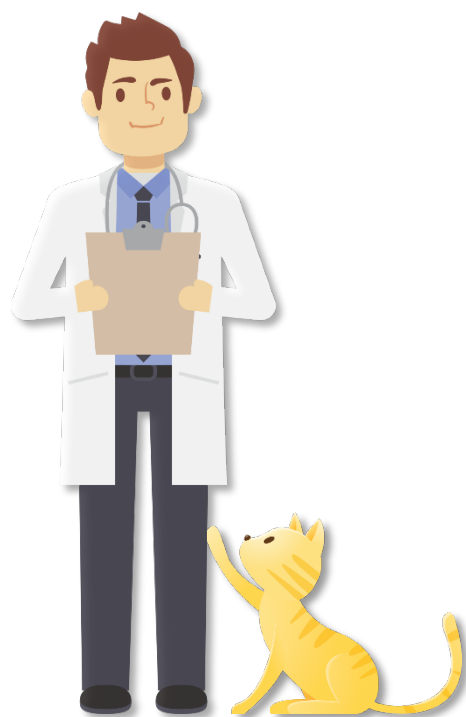


Petly Plans: Marketing Guidebook



Purpose

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. This guidebook focuses on ways in which you can market your plans before, during, and after a pet owner visits your practice. We will discuss opportunities to highlight your plans inside the practice through printed media, in person and phone conversations, and through external channels like social media, newsletters, and your website, along with providing best practice tips! While the ideas presented in this guidebook are a comprehensive compilation of marketing strategies, each veterinary practice can decide which tactics make the best sense for their branding, business model, and communication style.



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Creating a Team

Assigning a practice champion to oversee your marketing efforts is the first step in ensuring your messaging will be consistent over time. Your practice champion should have at least one other staff member helping with long-term marketing tasks as “many hands make light work.” *Be sure to reserve time in team meetings to discuss wellness plans and your marketing strategies.*

Marketing Your Plans

Before the Visit:



Curbside Marketing

Display signage to alert clients of your plan offerings *before they enter the practice!* The [Petly Plans marketing website](#) offers a wide variety of customizable options, including banners, lawn signs, parking signs, sandwich boards, posters, and window clings to ensure messaging about your plans is consistent, both inside and outside of the facility.



On-Hold Phone Messaging

Create an on-hold message about your wellness plan program to spread awareness of your plan offerings before a client care representative answers the phone! Keep your messaging simple, yet informative, and include a call-to-action. For example, “*Annual exams and vaccines are an important part of keeping your pet healthy and happy. Did you know our practice offers wellness plans? Wellness plans are a membership program that provides your pet with all their needs – all with easy monthly payments. Ask us about our wellness plans when we are back on the line!*”



Live Phone Interactions

Mention your plans when clients call. Have a script with talking points next to the phone as staff learn to navigate these conversations. Mention wellness plan options when a pet owner schedules a new puppy or kitten visit, wellness or vaccine appointment, dental visit, or spay and neuter surgery. Draw inspiration from the [Petly Plans staff scripts](#) by role-playing these scenarios in meetings to ensure staff feel comfortable.



Email Your Brochure

Email a digital version of your brochure. Create an email template or custom correspondence to save time.




Call-to-Action Messaging


- ☐ Add call-to-action messaging to invoices and estimates. Click the links for step-by-step instructions for [Cornerstone](#) or [AVImark](#) systems. For example: “*Did your pet receive services today that could have been covered with a preventive care plan? Ask us which plan is right for your furry family member!*”
- ☐ Add call-to-action messaging to your outgoing communications such as medical and appointment reminders and other correspondences from your client communication software. Be sure to include a snippet in texts, emails, and postcards.

□ Practice Website

Use your practice's website as an educational resource to help you get discovered online and to save time. Drive traffic to the site through newsletter and social media posts, brochures, daily interactions, and using SEO. Keep the following ideas in mind when designing your website pages:

- Use our [Petly Plans mock website](#) as a template for content and verbiage when designing your site. Post up-to-date images of your plan services and pricing, or prompt pet owners to call for pricing. Don't have plan services in a chart on your website? Get in touch with your Petly Plans team for info on obtaining design help!
- Post images on your pages that are specific to wellness plans. [Click here](#) to download and share royalty and copyright free images to your site, newsletters, and social media posts featuring puppies, kittens, senior pets, dental month content, flea and tick prevention, and so much more!
- Educate pet owners about the importance of wellness plans by listing frequently asked questions. Differentiate wellness plans from insurance! List their primary benefits so pet owners can read about them before the visit. Use and adapt our FAQ's from the [Petly Plans Helpdesk](#) and post on your site.
- Use SEO (search engine optimization) to help pet owners find your practice! Embedding SEO keywords on site images like: "*Wellness plans, preventive care, wellness plans in X city, wellness plans in X state/county/local jurisdiction*" and other targeted keywords can help pet owners shopping for practices with wellness plans find you online.

 **Best Practice Tip:** Link a pre-enrollment form on your site to expedite the enrollment process. Instruct your clients to complete and submit the form online prior to their appointment. Don't have a form to post on your site? [Click here](#) to see our sample form.


 **Best Practice Tip:** Dedicate an area or a page of your website to pet owner testimonials with pet photos. Ask your most devoted plan-holders for their thoughts about your plans. Be sure to post comments that tout the ease of financing monthly payments, and other plan perks. *Don't forget to obtain permission before positing!*



During the Visit: Check In

- ❑ Ensure printed materials, such as posters and floor decals are visible to spread the word and create awareness about your plans.
- ❑ Give a brochure or flyer to your client. Staple it to an invoice, estimate, or include it with a receipt for retail purchases.
- ❑ Display a wellness plan slide deck on a television screen, tablet, iPad, or other device in your practice. [Click the link](#) to download and use the slides from the Petly Plans Helpdesk. *The slides are set to a loop so you can hit play and walk away!*

Check Out


- ❑ Provide canned estimates comparing plan verses non-plan pricing for the visit or for future recommended services. For example, during the exam, the doctor recommends a dental. Provide the pet owner with an estimate showing the cost of the dental paid out-of-pocket verses enrolling in a wellness plan that day, which includes 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:** Provide staff with wearable items to promote your plans. Pins, scrub tops, tee-shirts, stickers, and other fun swag items can help spread the word! [Click here](#) to order customizable marketing materials. Want a specific item printed with your plan options, but don't see it available on the Petly Plans website? Submit your idea to a Petly Plans team member.



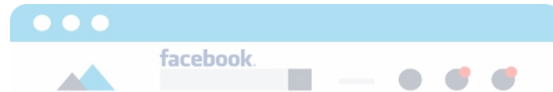
After the Visit:

□ Appointment Follow Up

Send a follow up text, email, or survey you've prepared ahead of time or call any pet owner who was offered a plan but did not opt in during the appointment. Be sure to include a digital copy of your brochure if one was not already provided. Some pet owners will want to discuss this decision with significant others before committing.

 **Best Practice Tip:** Pet parents love seeing photos of their fur babies displayed within your practice as well as on social media! Create a pet photo wall in your waiting area or in an exam room displaying pets who've been enrolled in plans.


Digital Media Campaigns





□ Social Media

Engage your clients on the social media platforms with the widest reach and the deepest multimedia engagement. Most businesses and individuals can be found on Facebook. Use Facebook to create excitement amongst pet owners. Don't forget to keep each post simple and include a call-to-action. Be sure to follow these best practice tips for all your ongoing social media posts!

- Attach a photo in each post about your wellness plans. [Click the following link](#) to download digital banners and images from the Petly Plans Helpdesk.
- The Helpdesk contains text along with image content for senior month, dental month, and puppy, kitten, and flea and tick season, and more. [Click the link](#) to review and post images and text to your social media accounts.
- Be sure to post about your plans on a regular cadence. Once or twice a week should be appropriate depending on the frequency of your regular posts. Remember, ongoing consistency is key to keep existing, returning, and new pet owners aware of your plans.

 **Best Practice Tip:** Facebook allows you to schedule your posts at pre-determined times. This eliminates effort when you're too busy to post in real time. Click the following links for text and images for your [pre-launch](#), [launch day](#), and [ongoing posts](#)!

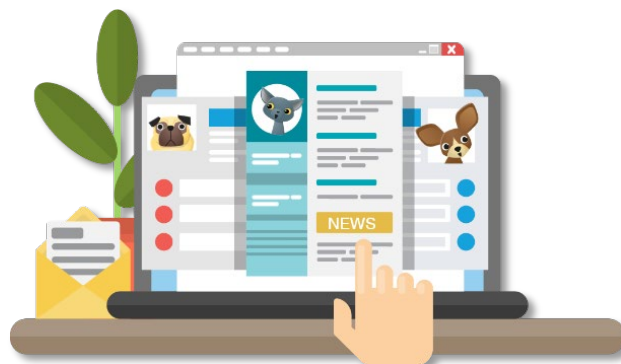
 **Best Practice Tip:** Post images of patients on plans along with a fun quote or testimonial to create engagement. Remember to request permission from pet parents before sharing.

 **Best Practice Tip:** Review this [6-minute training video](#) for additional information on engaging and education pet owners on social media. Use the link to sign up for a free newsletter and receive stories and tips from peers and industry experts.

□ Email Newsletters

Inform and educate pet owners about plan options, preventive care, and other important events at your practice on a routine basis. Follow our best practices below to help inspire your audience and ensure your message gets read:

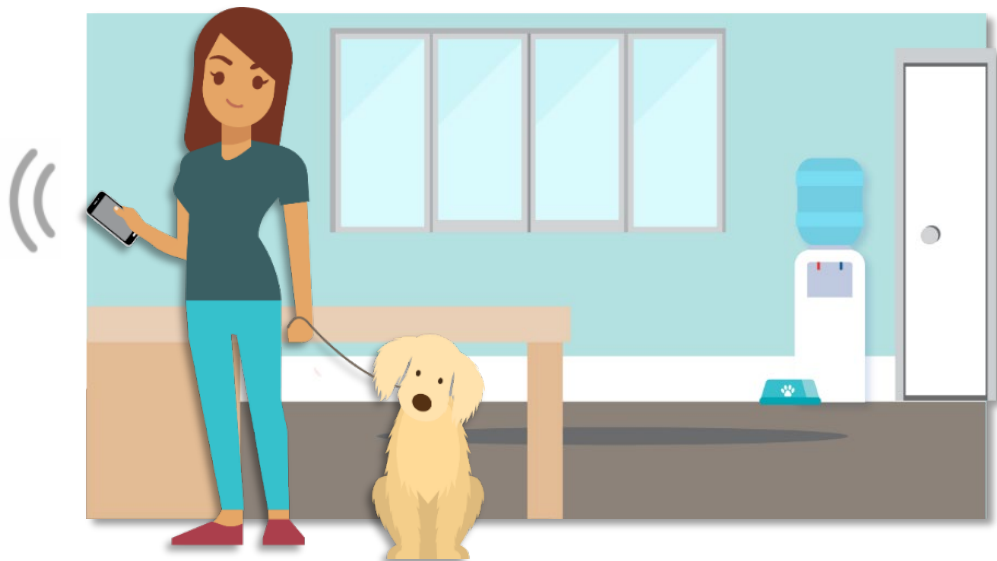
- [Images](#) and [text](#) for posts are available for download from the Petly Plans Helpdesk.
- Send information about your plans in a pre-launch newsletter announcing your [upcoming plan launch](#), on [launch day](#), and in ongoing posts. Dedicate an entire post to your plans or include a section in your regular newsletter with pertinent updates about the practice.
- Target clients by their pet's age, breed, species, or the date of their last visit to keep content relatable and personalized.
- Include a clear call-to-action for pet owners to call, email, or visit your website for more information.
- Use your newsletter to collect targeted feedback when it is needed. Ask for readers to respond to questions in writing or include links to an online survey to aggregate results. Remind readers their input is invaluable to encourage a response.
- Craft an email subject line that is succinct, specific, and entices pet parents to read your email. Use selective capitalization and special characters to help prevent your newsletter from getting trapped by spam or junk filters.
- Be sure to input every client email address in your database for maximum reach. Add a line on your patient admission paperwork to boost email capture rate. Run reports in your practice information management software to track your progress with capturing emails. Routinely screen email address formats for correctness ensuring opportunities to communicate with your pet owners.
- Continually educate pet parents about your plan offerings, the importance of preventive care, wellness visits, routine dental visits, spay and neuter procedures, and flea, tick, and heartworm prevention. [Visit the Pet Health Network](#) for hyperlinks to use in newsletters, social media posts, and website content.



□ Push Notifications and Text Message Campaigns

Client communication platforms and mobile applications allow you to send targeted text message campaigns and push notifications to an app. Expand your reach to tech-savvy demographics and engage your audience quickly! While text messages have a very high open rate, and are read within minutes, be sure to follow the guidelines below to ensure your text and app outreaches are personal, actionable, and well received.

- Include a call-to-action in your messaging. Instruct users to call or email the practice or visit your website for more information.
- Be cognizant of the time of day and time zones when sending these campaigns.
- Be engaging! Tell a story, make a joke or pun, and don't shy away from photos and emojis.
- Make your content personal and individualized. Some text marketing campaigns allow you to incorporate custom fields, such as the pet owner or pet name. Send alerts based on a pet's age, breed, species, or other criteria, where appropriate.
- You may need to obtain your audience's express consent before sending a mass text message campaign or alert. Research the communication laws of your local jurisdiction or consult a legal expert for more information.
- Pique your reader's curiosity and keep your audience engaged by only providing pertinent updates. Alerting clients when your practice is launching plans, improving plan services, and sending other info can be helpful. The use of text message campaigns and push notifications, however, should be employed less frequently than email newsletters to avoid the user from unsubscribing or turning off notifications.



Print Media Campaigns

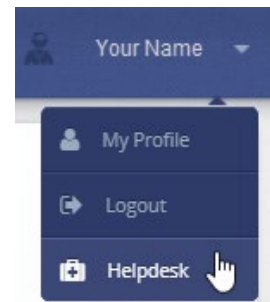
□ Direct Mail

Direct mail marketing and the use of custom messaging are highly effective ways to acquire and retain clients and spread the word about your wellness plans. This is especially true for your pet owner demographic that may not have an email or cell phone number to share. Read on for tips and best practices on ensuring your postcards and mailed collateral reach your pet parents and drive results.

- Include a clear call-to-action to drive clients to your website, or to call, text, or email your practice for more information about your plans. Use a QR code to link to your website!
- Does your client communication tool send medical reminder postcards? Be sure to include a custom message about your wellness plan offerings so pet owners are aware their upcoming vaccines, dentals, wellness visits, or other services could be covered by enrolling in a wellness plan.
- Keep your content as personal as possible. Use custom fields to add the pet owner or pet's name. Send postcards with images that are age, breed, or species specific, or that feature the pet's actual photo where possible to capture your pet owner's attention.
- Routinely review your client address list in your practice information management software and screen your individual mailing lists. Be sure your staff are capturing and inputting pet owner addresses at every opportunity. Correct any addresses with incorrect formats or that contain impartial information to optimize your campaign's effectiveness.

🐾 **Best Practice Tip:** Direct mail services often sell mailing lists directly to consumers. Send a postcard to people who've just moved to your area to target and acquire new clients and boost enrollments.





Additional Resources

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

- [Petly Plans Helpdesk: Marketing to Your Pet Owners.](#)
- [Petly Plans Marketing Page](#) to place a marketing order.
- [Petly Plans Recorded Webinar: Marketing to Your Clients.](#)
- [Petly Plans mock website](#) to help you design your practice's wellness plan pages.
- [Petly Plans pet owner FAQ's.](#)
- [Video: Tips to Engage and Educate your Clients on Social Media.](#)
- [IDEXX Practice Life website](#), for everything practice management.
- [Download images](#) for your website, newsletters, social media posts, and more.
- Visit [Pet Health Network](#) for content to share in newsletters, social media, and more.
- Download the [Petly Plans Playbook – Tools for Success.](#)
- Download [Staff Scripts.](#)
- Download the Petly Plans Guidebooks:
 - [Plan Development](#)
 - [Workflow](#)
 - [Reports](#)
 - [Goals and Incentives](#)

Need a deeper dive into your practice's overall marketing strategies?
[Click this link](#) to request a branding consultation with a Petly Plans expert!

