What You’ll Learn

- When to send reminders
- Tracking your response rates
- Increasing patient visits with email and text messaging

Reminders Should Reflect Your Standards of Care

When patients miss routine checkups, veterinarians forgo opportunities to diagnose obesity, dental disease, and other conditions. Preventive care is the cornerstone of veterinary medicine, letting us proactively help patients live healthier, longer lives. Our profession needs to promote the importance and advantages of regular physical exams, especially for cats. Communicate value for exams and engage clients in the experience so you foster return visits.

An Alarming Number of Pets Are Missing Preventive Exams

A 2012 study by Communication Solutions for Veterinarians of 107 clinics found that 57% of dogs had at least one preventive care exam within a three-year period, while 43% of canine patients didn’t have any exams. Among cats, 41% had at least one preventive care exam within a three-year period, while 59% of feline patients didn’t have any exams.

Change Your Terminology

To help pet owners understand the importance of preventive care, the first step is to change your terminology. Replace “wellness exam” with “preventive care exam.” For example, I have two young indoor cats. Caymus is 2 years old, and Opus is 4. If I’m a typical cat owner, I might assume that my young indoor cats don’t need wellness exams. An American Association of Feline Practitioners and Bayer Healthcare study revealed that 52% of cats had not received a preventive care exam within the past 12 months (Veterinary Practice News 2013).

According to the American Veterinary Medical Association’s (AVMA’s) 2012 U.S. Pet Ownership & Demographics Sourcebook, 11% of dog owners and 27% of cat owners surveyed only visit a veterinarian when the animal is sick. Those percentages equal 7.5 million dogs and 20 million cats (Veterinary Practice News 2012).

Clients may perceive wellness exams as optional, while preventive care exams are actionable—and pet owners want to keep their best friends healthy. So update your practice management software, changing the description from wellness exam to preventive care exam. This will revise the term on invoices, treatment plans, and reminder emails and postcards. Your goal is to change clients’ perceptions from “Veterinarian = Shots” to “Veterinarian = Preventive Care.” Clients want their pets to enjoy long, healthy lives. Regular veterinary checkups could make that possible. Changing our terminology to “preventive care exam” is a small step in significantly shifting pet owners’ perceptions.

AVMA and the American Animal Hospital Association (AAHA) have collaborated on the publication of new health guidelines for dogs and cats. Developed in response to startling statistics that indicate that visits to veterinarians are declining while preventable diseases in pets are increasing, these guidelines are designed to provide the foundation for the veterinary practice team to promote preventive veterinary medicine. You can download these guidelines at www.aahanet.org/Library/PreventiveHealthcare.aspx.


AAHA and AAFP recommend biannual exams for seniors. Perform exams every six months, which is the equivalent of every two to three human years. Senior preventive testing is performed at least once a year, which is equal to four to five human years (AAHA 2005). Just as senior screening starts when people are middle aged, senior care for pets should begin when they are in the last 25% of their predicted life span for their species and breed. Set client expectations on the frequency of exams and diagnostics based on life stage when patients are young. The purpose of the senior screen is to establish a baseline for future comparison and to detect subclinical abnormalities when preventive and therapeutic intervention may have the most benefit (ibid.).
Reminder Best Practices
While you cannot predict when pets will become sick or injured, you can anticipate when they will need preventive care. Exams, diagnostics, vaccines, therapeutic diets, and parasite preventatives are renewable wellness services that generate 38% of revenue (Myers 2009). Reminders drive future visits.

When to Send Reminders
Upgrade to weekly reminders. Abandon once or twice monthly reminder schedules. When you send reminders once a month, responding clients typically make appointments within a week. You have a tsunami of clients booking exams for 10 business days and then the schedule dries up like a drought, with dozens of open slots. The next wave occurs when reminders go out. Revenue follows the same roller-coaster pattern. Rather than peaks and valleys, your goal should be to have consistency. Move to weekly reminders so you’ll see a steady stream of clients booking appointments, more even cash flow, and less stress for staff and doctors.

Reminder Schedule
1st reminder: Postcard + email sent three weeks before due date
2nd reminder: Postcard + email with urgent message sent two weeks after due date
3rd reminder: Phone call + email three weeks after due date to set up appointment

Outsource Your Reminders
If you mail your own reminders, aim for clients to receive them midweek. Many practices see an increased number of sick patients and emergencies on Mondays, Fridays, and Saturdays. Because local mail delivery takes one or two days, don’t mail reminders on Fridays when they will land in clients’ mailboxes on Saturdays. Clients who immediately call to schedule appointments may experience extra holding time, or your practice may be closed on Saturday afternoons. Mail reminders on Mondays or Tuesdays. Then clients will receive postcards on Tuesdays or Wednesdays, when you can more quickly handle calls.

Your team’s time can be better spent on serving patients and clients instead of spending hours printing, stamping, proofing, and mailing reminders. Outsourcing your postcard or magazine reminders can ensure timely delivery and generate significant savings. You’ll also avoid the “oops” factor of late reminders when you have a busy week or sick employee and don’t get reminders sent on the preferred day.

Outsource your reminders to a provider such as IDEXX Pet Health Network Pro, which syncs with Cornerstone and Avimark so reminders automatically go out. Here is a financial analysis of internal costs to your practice for the do-it-yourself approach versus outsourcing mailings to IDEXX Pet Health Network Pro. Calculations are based on a typical two-doctor practice that sends 500 reminders per month. (Author note: Based on USPS rates as of 10-01-13.)

<table>
<thead>
<tr>
<th>Item</th>
<th>In-Clinic Annual Costs</th>
<th>Pet Health Network Pro Postcard Annual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network laser printer</td>
<td>$200</td>
<td>$0</td>
</tr>
<tr>
<td>Laser toner</td>
<td>$100</td>
<td>$0</td>
</tr>
<tr>
<td>Staff labor</td>
<td>$3,120</td>
<td>$0</td>
</tr>
<tr>
<td>Postcards</td>
<td>$3,000</td>
<td>$3,840</td>
</tr>
<tr>
<td>Postage</td>
<td>$1,980</td>
<td>Included</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$8,400</td>
<td>$3,840</td>
</tr>
<tr>
<td>Cost per reminder</td>
<td>$1.40</td>
<td>$0.64</td>
</tr>
</tbody>
</table>

(Note: Network laser printer cost is based on $800 for equipment with an average life of four years. Laser toner cost is estimated at 5 cents per sheet industry average, with three reminders printed per sheet. Printing cost is for reminders only, not other practice uses. Staff labor is based on wage of $15 per hour, including benefits, with 4 hours per week spent on reminders. Reminders sent 52 weeks. In-clinic postcard cost is $0.50 each for purchased postcards with average of 500 cards per month. Postage is the current USPS rate of $0.33 each, with 500 postcards sent per month. Annual total is for sending 500 reminders per month for 12 months.)

For a typical two-doctor practice, outsourcing mailings could save an average of $4,560 annually. What new equipment could your hospital buy with $4,560? You could invest in medical equipment that generates revenue while also improving patient care.
**Use a Combination of Postal and Email Reminders**

Sending just one reminder postcard could put preventive patient care at risk. What if the postal service fails to deliver the postcard? What if the client sets the postcard aside and forgets to call to schedule an exam? In a mailbox filled with catalogs, advertisements, and bills, will the postcard from your veterinary hospital stand out or get lost in the clutter? Using multiple reminder methods—postal and email—can increase response rates. Repetition of the message gets results.

A 2012 Nielsen report shows that 50% of Americans now use smartphones. This marks the first time that smartphones have outperformed “dumb” phones since Nielsen began tracking them several years ago. Mobile email is on the rise, as more and more people own smartphones or mobile devices such as tablets.

- 82% of smartphone users check and send email with their devices
- 36% of email is now opened on a mobile device, with 33% for desktop and 31% for webmail (Emailmonday n.d.)

**Collecting Clients’ Email Addresses**

Industry research shows that 30% of people change their email addresses annually, and the average person has three email accounts. How you ask for clients’ email addresses matters. Don’t say, “Can I get your email?” Instead, use benefit statements that will have them gladly volunteer their email addresses, such as the following:

> “Our practice is going green and sending more reminders by email. We want to be able to quickly notify you about pet health alerts such as a pet food recall or a rabies outbreak in our area. You also can access Jake’s reminders and request prescription refills and appointments through our website. Which email would be the best for you to receive Jake’s reminders?”

After three years of collecting clients’ emails, most practices have captured 60% to 70%. Strive to get 70% or higher. Each month, monitor the number of emails you’ve collected and share results with your team. Run a report in your practice management software monthly to identify the number of clients with emails.

Research from Vetstreet shows that reminder compliance is 31% higher when sending a combination of postal and email reminders.

**Text-Messaging Trends**

On average, it takes 90 minutes to respond to an email, but 90 seconds to respond to a text message (SnapHop n.d.). Every 24 hours, 6.4 billion text messages are sent, and 98% of all text messages are opened (Mashable n.d.).

Based on their individual cellphone plans, clients may receive unlimited texts or pay a fee. That’s why text messaging is an opt-in service that clients must choose. Pet owners log into their Petly pages to opt-in for texting. IDEXX offers an email campaign, “Would you like us to be able to text you appointment confirmations?” that instructs clients on how to opt-in. Clients can choose to receive email or text confirmation for upcoming appointments. In your Pet Health Network Pro preferences, your clinic sets appointment confirmations to be texted one to four days before exams. When clients receive text confirmations, they reply “Confirm” or can touch a hyperlink to call your clinic. If your practice uses Cornerstone, appointments show as confirmed in your schedule.

**Monitor Reminder Response Rates Monthly**

Monitor response rates monthly to correct any short-term decline before it becomes a long-term problem. As a practice consultant, I have found that reminders are the number-one business growth strategy that I correct. Too many hospitals take the approach of “that’s the way we’ve always done it” and are not adapting their reminder methods or frequencies based on today’s trends. Even fewer are watching their reminder performance monthly.

Use reports in your practice management software to view response rates every month. Watch for overall response rates and any emerging downturns. Target an overall reminder response rate of 70%, once clients have received first, second, and third reminders.

Let’s say you’re the practice manager and view the report in September. This month’s response rate is 68%, and you’re close to the goal of 70%. Follow up with client care coordinators to ensure they’re consistently making overdue reminder calls.
Let your team know they need to schedule an additional 30 appointments to meet the monthly goal. If you have five client care coordinators, each needs to book six exams for overdue patients. If your practice is open six days a week, that’s only one overdue patient a day! Achieving this realistic goal not only improves patient care but could also have immediate financial benefits. According to the *AAHA Veterinary Fee Reference*, 8th edition, the average feline preventive care visit generates $186, while a canine preventive care visit averages $208. If your team schedules 30 additional exams, with 60% dogs (18 exams × $208) and 40% cats (12 exams × $186), the income potential is $5,976.

**Create Distinct Reminders**

Have computer codes that separate preventive screens from sick-patient diagnostics. You need to distinguish the reason for testing, because it influences future reminders and impacts the accuracy of compliance results.

Let’s say your hospital is located in Tennessee, where 1 out of 88 dogs was testing positive for ehrlichiosis in 2013, according to the Companion Animal Parasite Council ([www.capcvet.org](http://www.capcvet.org)). You perform an annual heartworm/tick test as a preventive screen, but use the same IDEXX 4DX Snap® test when a sick patient visits with symptoms of tick-borne disease. When you run compliance reports to see the percentage of active dogs visiting in the past 12 months that have received a heartworm/tick test, the results may be inflated, because preventive and sick-patient testing are in the same code. Instead, create distinct codes, such as “Heartworm/tick preventive screen” and “Tick-borne disease test.” Having the word “preventive” in the first code shows it’s the correct code to use for annual visits, not a sick-patient workup. When you run compliance reports, you can then search only “heartworm/tick preventive screen” to obtain accurate results. You also could use the term “screen” in preventive care and “test” in sick-patient diagnostics.

When you create diagnostic codes in your practice management software, be sure to use client-friendly descriptions that will print on invoices and reminders. Clients will not understand “CBC, Comprehensive with FeLV,” but will understand “Feline leukemia/FIV preventive screen.”

Common diagnostic codes that need distinct reminder codes include the following:

<table>
<thead>
<tr>
<th>Preventive Screen</th>
<th>Sick-Patient Diagnostic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heartworm/tick preventive screen</td>
<td>Tick-borne disease test</td>
</tr>
<tr>
<td>Intestinal parasite preventive screen</td>
<td>Comprehensive stool test</td>
</tr>
<tr>
<td>Adult preventive blood and urine screen</td>
<td>Comprehensive disease test</td>
</tr>
<tr>
<td>Senior preventive blood and urine screen</td>
<td>Comprehensive blood and urine test</td>
</tr>
<tr>
<td>Preventive blood-pressure screen</td>
<td>Blood pressure analysis</td>
</tr>
<tr>
<td>Feline leukemia/FIV preventive screen</td>
<td>Retrovirus testing</td>
</tr>
<tr>
<td>(Adult indoor/outdoor and outdoor cats)</td>
<td></td>
</tr>
</tbody>
</table>

**Set up these reminders in your practice-management software:**

<table>
<thead>
<tr>
<th>Reminder</th>
<th>Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PROFESSIONAL SERVICES</strong></td>
<td></td>
</tr>
<tr>
<td>Pediatric preventive care exam</td>
<td>Every 3 to 4 weeks until 16 weeks of age</td>
</tr>
<tr>
<td>Adult preventive care exam</td>
<td>12 or 6 months</td>
</tr>
<tr>
<td>Senior preventive care exam</td>
<td>6 months</td>
</tr>
<tr>
<td>Disease-management exam</td>
<td>3 months</td>
</tr>
<tr>
<td>Core vaccines</td>
<td>Every 1 or 3 years based on your protocol</td>
</tr>
<tr>
<td>Non-core vaccines</td>
<td>1 year or based on your protocol</td>
</tr>
<tr>
<td>Grade 1 dental treatment</td>
<td>12 months</td>
</tr>
<tr>
<td>Grade 2 dental treatment</td>
<td>9 months</td>
</tr>
<tr>
<td>Grade 3 dental treatment</td>
<td>6 months</td>
</tr>
<tr>
<td>Grade 4 dental treatment</td>
<td>3 months</td>
</tr>
<tr>
<td><strong>DIAGNOSTICS</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Intestinal parasite preventive screen
12 or 6 months

### Heartworm/tick preventive screen
12 months

### Adult preventive screen
12 months

### Senior preventive blood and urine screen
12 or 6 months

### Cardiopet® proBNP test
12 or 6 months

### Pediatric feline leukemia/FIV screen
Before 6 months of age

### Adult feline leukemia/FIV screen (indoor/outdoor or outdoor cats)
12 months or prior to vaccination

### Preventive blood-pressure screen (senior pets)
12 months

### Drug monitoring (Set based on drug)
6 months

#### PRODUCTS

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heartworm preventative, 1 dose</td>
<td>Callback in 20 days</td>
</tr>
<tr>
<td>Heartworm preventative, 6 doses</td>
<td>5 months</td>
</tr>
<tr>
<td>Heartworm preventative, 12 doses</td>
<td>11 months</td>
</tr>
<tr>
<td>ProHeart, 6-month injection</td>
<td>5 months</td>
</tr>
<tr>
<td>Flea/tick preventative, 1 dose</td>
<td>Callback in 20 days</td>
</tr>
<tr>
<td>Flea/tick preventative, 6 doses</td>
<td>5 months</td>
</tr>
<tr>
<td>Flea/tick preventative, 12 doses</td>
<td>11 months</td>
</tr>
<tr>
<td>Seresto flea/tick collar, 8-month duration</td>
<td>7 months</td>
</tr>
<tr>
<td>Long-term drug refills</td>
<td>1 month prior or based on quantity purchased</td>
</tr>
<tr>
<td>Therapeutic diets</td>
<td>Callbacks at Day 3 and Day 30 when diet change is made, refill reminders every 4 to 6 weeks or based on quantity purchased</td>
</tr>
</tbody>
</table>

### Improve Medication Monitoring for Pets on Long-Term Prescriptions

Drug monitoring ensures safe administration and identifies any side effects or potential complications or interactions with other drugs. Monitoring pets on long-term medications lets veterinarians establish a baseline for patients and detect any changes early so medication adjustments can be made. To create your practice’s protocols for medication monitoring, have doctors discuss the type and frequency of tests for arthritis, heart, seizure, thyroid, and allergy medications. Many pharmaceutical package inserts and veterinary journals have suggested protocols your veterinarians can reference when developing your guidelines. For example, consider conducting liver and kidney function blood tests prior to administration of arthritis medication and repeating them every six months. Download the IDEXX chart on “The Practical Approach to Drug Monitoring” at www.idexx.com/view/xhtml/en_us/smallanimal/education/reference-library/client-education/general.jsf).

#### Explain the Need for Drug Monitoring When the First Prescription Is Dispensed

Give clients the brochure “Prescription Medications: Testing Helps Us Choose the Right Medication—Monitoring Helps Ensure Lasting Effectiveness” from IDEXX Laboratories. Explain why you need to conduct blood tests prior to drug administration as well as the intervals of routine retesting.

#### Enter the Number of Refills

When filling the first prescription, the technician notes the number of refills available in the computer and medical record. For example, if a doctor wants a blood test every six months and the technician is filling a one-month supply, five refills of 30 tablets are available. The number of refills also prints on each prescription label.

If a client whose dog takes nonsteroidal anti-inflammatory drugs (NSAIDs) for arthritis calls for a refill, the receptionist can access the client’s record on the computer and instantly see if the medication can be refilled without having to ask a doctor or pull a medical record. This is a significant time saver and provides timely answers for clients.
Send Reminders for Testing
When the initial prescription for a long-term drug is filled, enter a reminder in your veterinary software for the follow-up blood test. Create a computer code such as “Arthritis Drug Monitoring” that has a six-month reminder. This code is entered in addition to the prescription. In six months, this code will trigger a reminder.

Sample Reminder Message for Drug Monitoring
“(Pet name) has been previously diagnosed with a medical condition that requires monitoring. Maintaining your pet’s health is important to us. (Pet name) is due for a blood test for drug monitoring, which is required for future prescription refills. Please call us at 555-555-5555 for an appointment.”

Use Stickers When Testing Is Coming Due
When blood work will be due before the next refill, put a colored label on the prescription vial such as “Blood test required before next refill.” The prescription label also will note that zero refills remain.

Improve Compliance for Therapeutic Diets with Callbacks and Reminders
The 2003 AAHA compliance study found that only 19% of dogs and 18% of cats were in compliance with appropriate therapeutic diets. A two-year University of Minnesota study found that a renal diet extends life in dogs and cats with kidney disease (Ross et al. 2005).

If you’ve diagnosed kidney disease in a cat, a therapeutic diet is key to the successful long-term management of the disease. Use medical callbacks to follow up on the diet change, just as you would perform a medical callback for a newly diagnosed patient with a serious illness. Especially when changing cats’ diets, veterinarians will often send home a few cans to test palatability. Many clients fail to do a proper diet transition and the pet returns to its old food, despite the medical need to eat a therapeutic diet.

Whenever a diet change is made, call the client at Day 3 and at Day 30. Three days after the client’s appointment, a staff member calls to check on the food transition. An example of what to say is:

“This is Your Name with Your Veterinary Hospital. Dr. Name asked me to call to confirm that you’re making the transition from Ollie’s previous food to the new therapeutic diet for kidney disease. When switching foods, you should be mixing the two foods, gradually increasing the proportion of new food over one week and reducing the amount of the previous food. Have you begun the transition to get Ollie on his new kidney diet? Is he eating it? Eating this diet is the cornerstone of Dr. Name’s treatment plan and will help us better manage Ollie’s kidney disease. Research shows that cats with kidney disease can live twice as long after diagnosis if they eat a therapeutic diet. I will give you a courtesy reminder to refill Ollie’s food, which should be in three weeks. Would you like me to contact you by email or call?”

At Day 30, call the client again. This time, say:

“This is Your Name with Your Veterinary Hospital. Dr. Name asked me to remind you to refill Ollie’s therapeutic diet, so we can help successfully manage his kidney disease. I have a case of food ready for you to pick up. We’re open from 7 a.m. to 7 p.m. this week. Just visit our hospital at your convenience, and we’ll have your diet ready. If you have questions, please call us at 555-555-5555.”

Make Overdue Reminder Calls
When you outsource postal reminders, client care coordinators can devote time to client service. Employees can call clients whose pets are overdue for preventive care and get them to schedule exams. Your greatest success will be with patients that have just fallen into the third reminder cycle and are only three weeks overdue.
If you get voicemail, leave this message:

“This is Your Name calling for the doctors at Your Veterinary Hospital. We are worried that Opus is past due for his preventive care exam, vaccines, diagnostic testing, and heartworm and flea/tick preventatives and might now be unprotected. Will you please call us this week at 555-555-5555 to schedule his appointment?”

If you talk to the client:

“This is Your Name calling for the doctors at Your Veterinary Hospital. Opus is now overdue for his preventive care exam, vaccines, diagnostic testing, and heartworm and flea/tick preventatives. We’re worried about his health. When is a convenient time for you to come in for an appointment this week? The doctor can see you at 6 p.m. Thursday or 9 a.m. Saturday. Which is more convenient for you?”

The phrase “calling for the doctors” communicates that your veterinarians are aware of the pet’s overdue status and are genuinely concerned. The warning of “may now be unprotected” is a call to action. Overdue vaccines, diagnostic tests, and missed doses of preventatives could put the pet’s health at risk. Known as the two-yes-options technique, this phrasing significantly increases the chance that you will schedule an appointment. This phrase is stronger than “Do you want to make an appointment?” which is a yes-or-no answer. If calling home phone numbers, call between 5 p.m. and 7 p.m. on weekdays and 9 a.m. to 11 a.m. on Saturdays. You’re more likely to catch clients arriving home from work during the week or on Saturday mornings before they leave to do weekend errands. If calling cellphones, contact clients between 8 a.m. and 8 p.m. Always call cell phones first!

For additional training and scripts, visit www.csvets.com/webinars. There you will find information on our on-demand webinar entitled “Callbacks That Get Clients to Come Back,” which is approved for 1 hour of CE credit.

References