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Growing Foot Traffic: Best Practices for Enhancing Client Retention

Marketing – Wellness Reminder
Optimization

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This Morning's Agenda

1

The Simple Math:
GP Revenue Generation

2

Boring but Golden:
Client Contact Information

3

The Growth Linchpin:
Wellness Visit Reminders

4

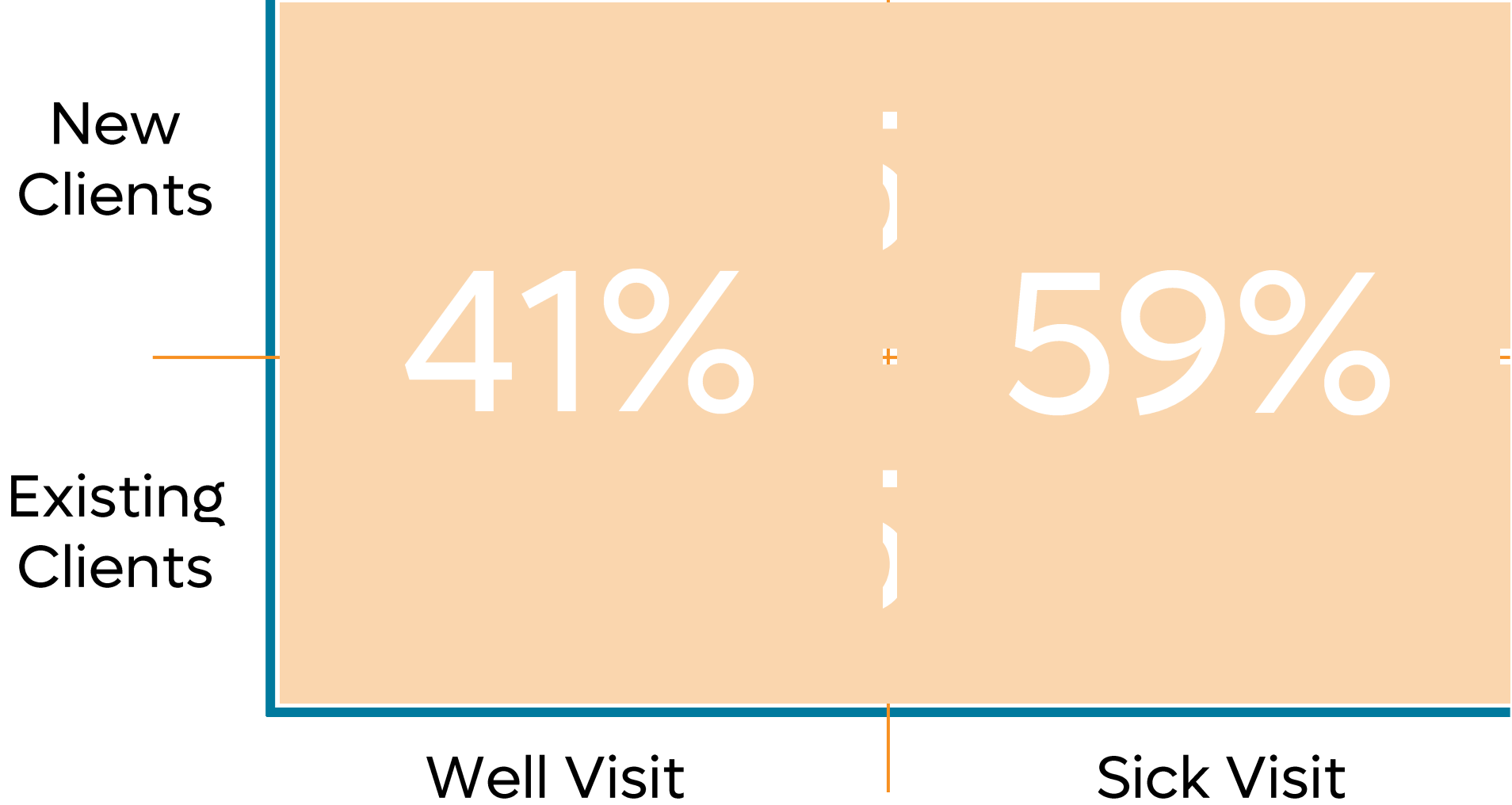
Three Things to Do TOMORROW!



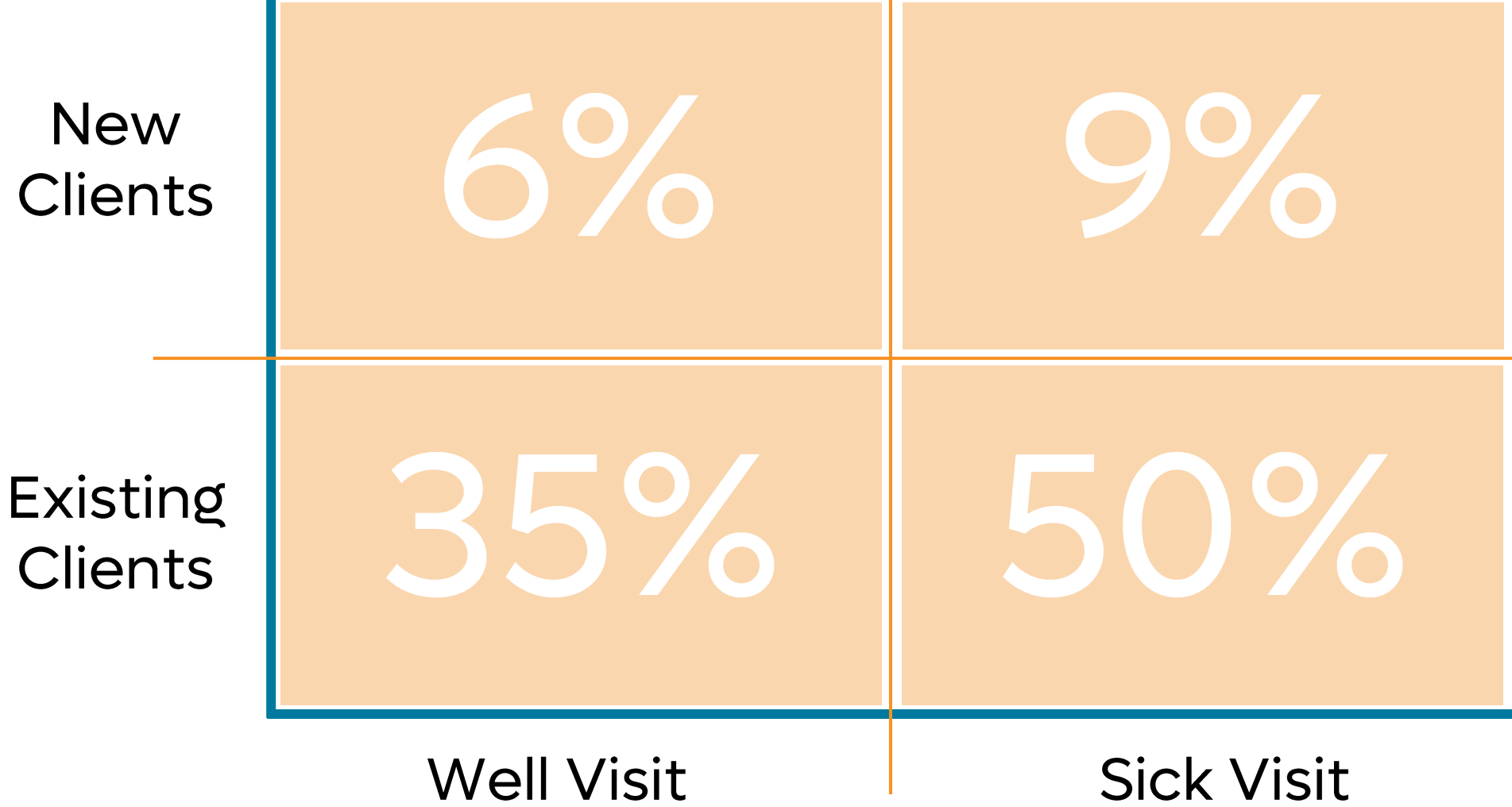
“Regardless of the breadth of your clinical offerings, your practice’s revenue makeup is nearly identical to every other GP in the room.”



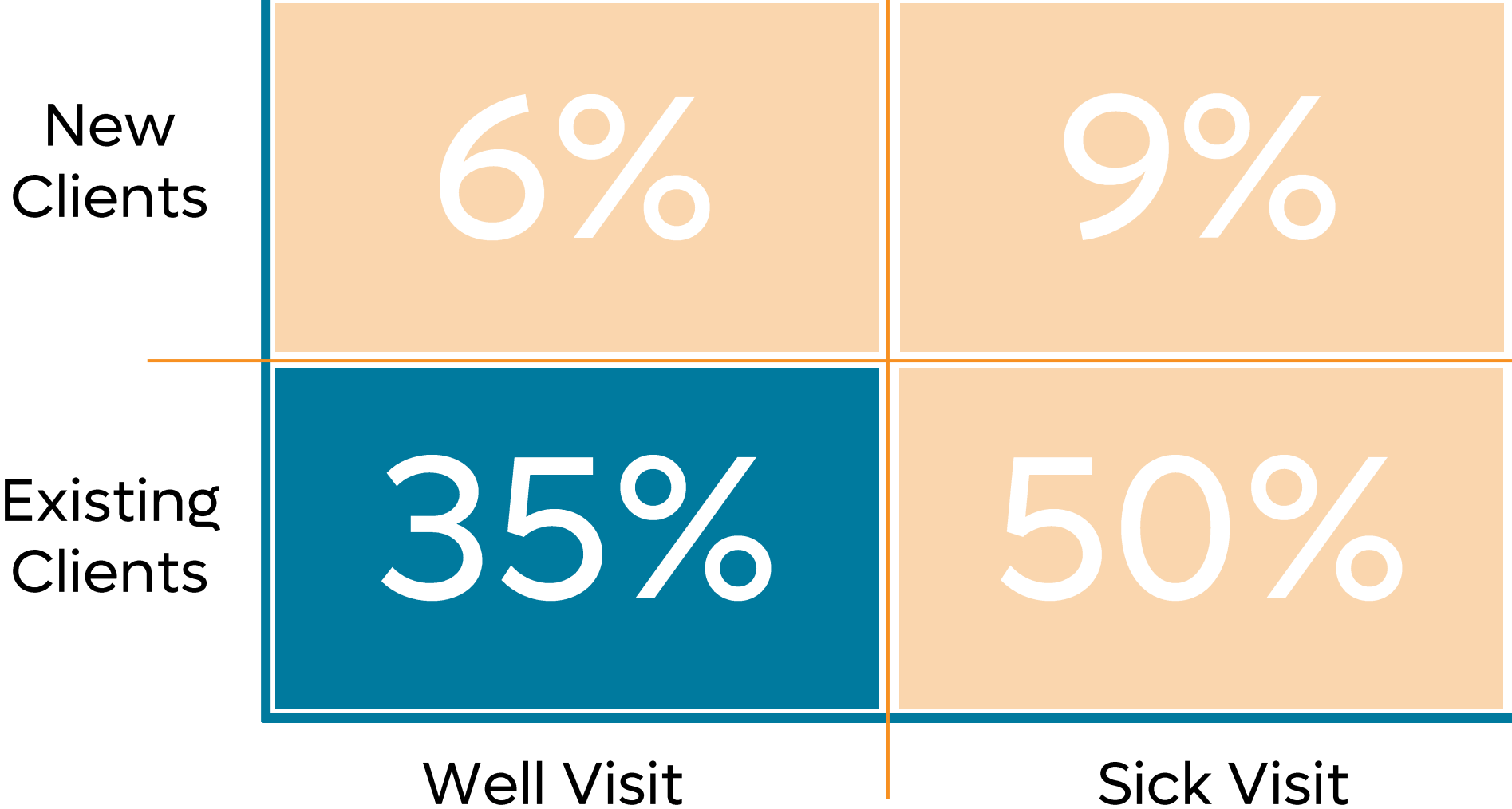
The Client/Visit Matrix



The Client/Visit Matrix



The Client/Visit Matrix



The True "Cost" of Clients

- Different resources are required for new versus existing clients.
- According to Bain & Company, a leading management consulting firm to Fortune 500® companies, it costs 6-7x more to acquire a new client versus keeping an existing one.



- The differential is **even higher** in veterinary medicine.

The True “Cost” of Clients

Client retention across industries

- Best Buy has no idea when you’ll next need a new television
 - To retain you as a client, they need to market constantly to be **“in the right place at the right time”** should you need a television in the future.
- Your dentist knows you need to return in six months.



You **KNOW** when Fido needs his next rabies vaccination.

Why So Little Love for Existing Clients?!?

Common reasons client retention rarely gets the attention it deserves



“I can’t control if someone comes back to the practice!”

- Categorically false!!!



“Existing clients aren’t a source of revenue growth.”

- Are 100% of your wellness protocols adopted today?



“Our clients love us! They’ll come back.”

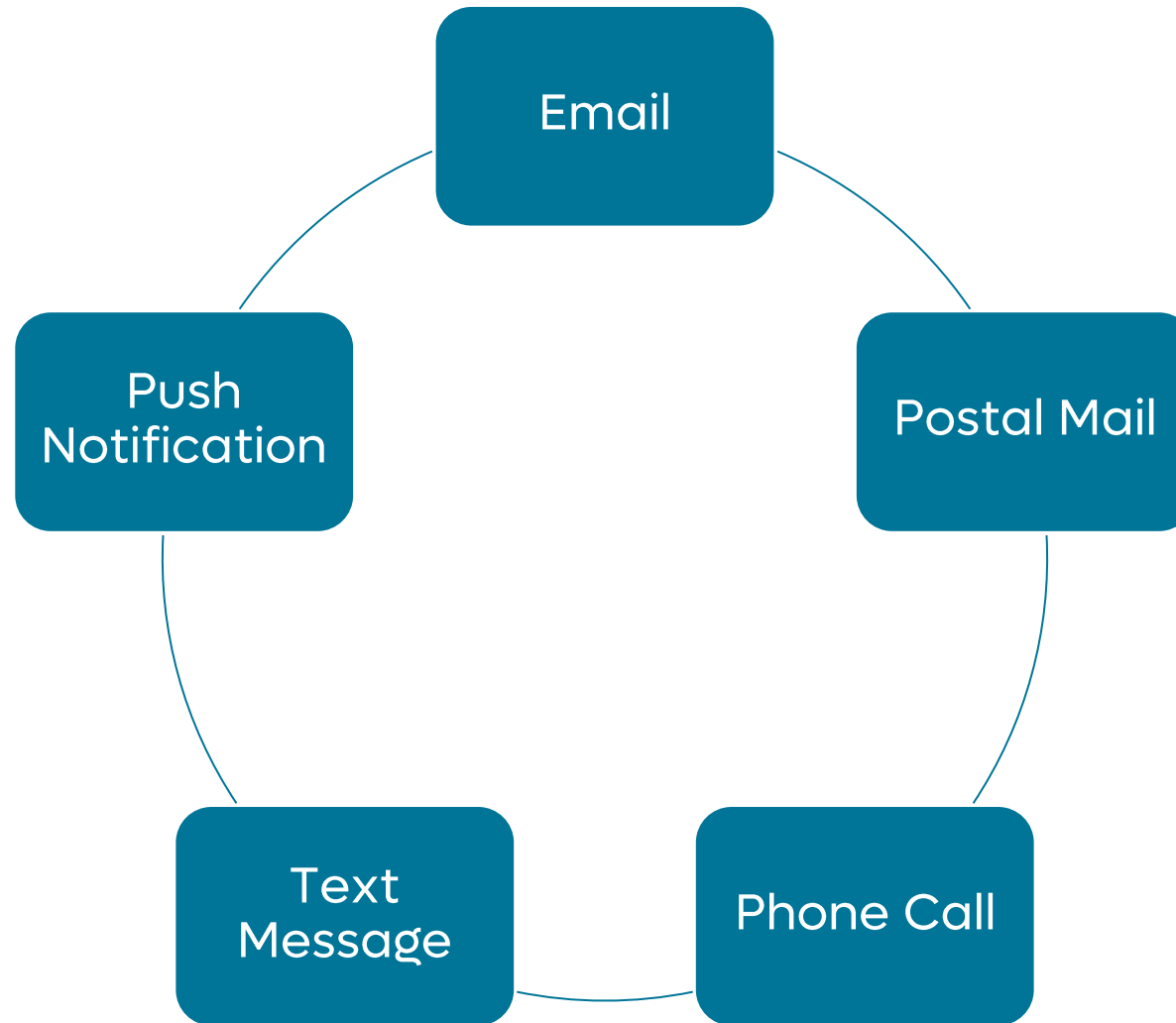
- Dangerous. “Switching costs” in veterinary medicine are low.



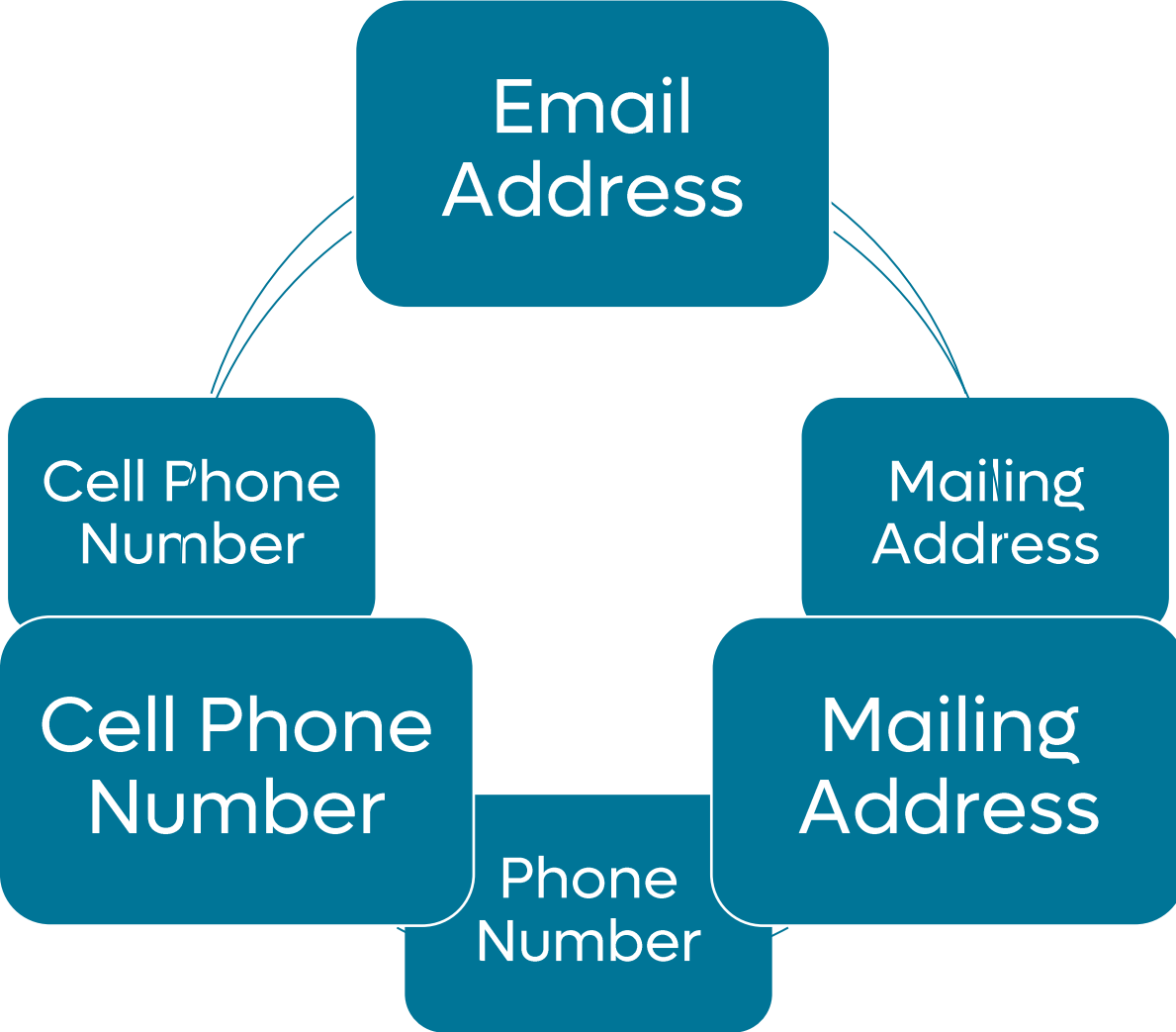
Boring but Golden Client Contact Information



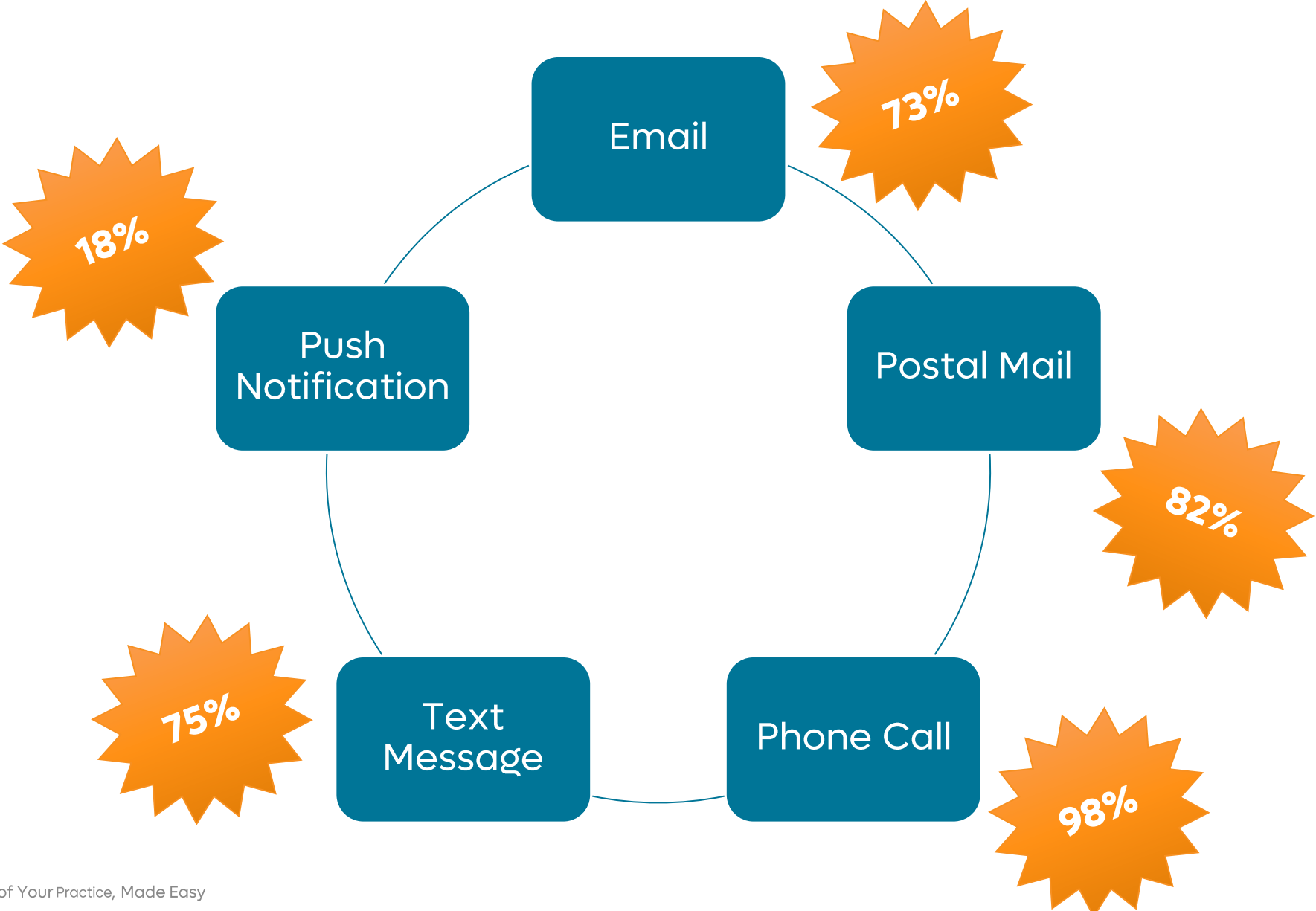
1:1 Channels of Communication



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1:1 Channels of Communication



How Can We Do Better?

- **Pick One:** Have the team confirm the client's address, cell number, or email address **EVERY** time they interact with a client.
- **Celebrate the Stats:** Almost every communication platform reports on email capture compliance and/or contact info corrections. Share those with the team!



Publish an email/cell number-use policy

3 Reasons Your Emails Can Be Undeliverable or Unopened

1

No Address on File!

A client can't open what you don't send.

2

Typos!

This isn't getting delivered:
Scooby.Doo@gmail.com

3

Spam Filters!

Reign in what some communication
platforms send on your behalf

Sample Email/Text Use Policy

- The practice will never sell (or rent) your email address or cell phone number to any outside party.
- The practice will only use email addresses for the following:
 - Service/product reminders
 - Messages from the medical team pertaining to your pet's health
 - Promotional offers, coupons, or news/announcements
- The practice will only use send text messages for the following:
 - Service/product reminders
 - Messages from the medical team pertaining to your pet's health
- You, the client, can unsubscribe from our distribution lists at ANY time.

2 Reasons Your Postcards Won't Be Delivered

1

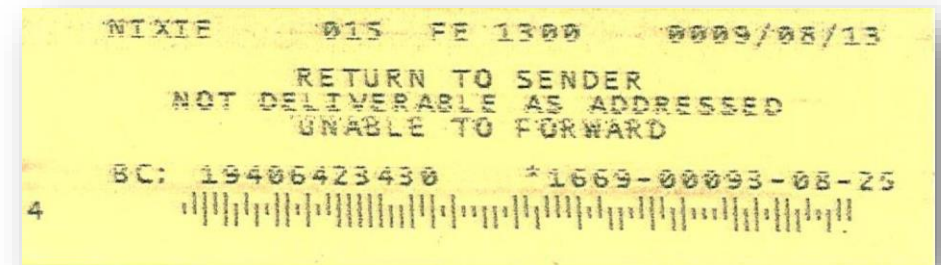
Typos!

Street numbers are the most common problem

2

Change of Address

USPS is a convoluted beast. Depending on what is printed on the postcard, they will auto-forward mail for up to 18 months and may or may not tell you about it.



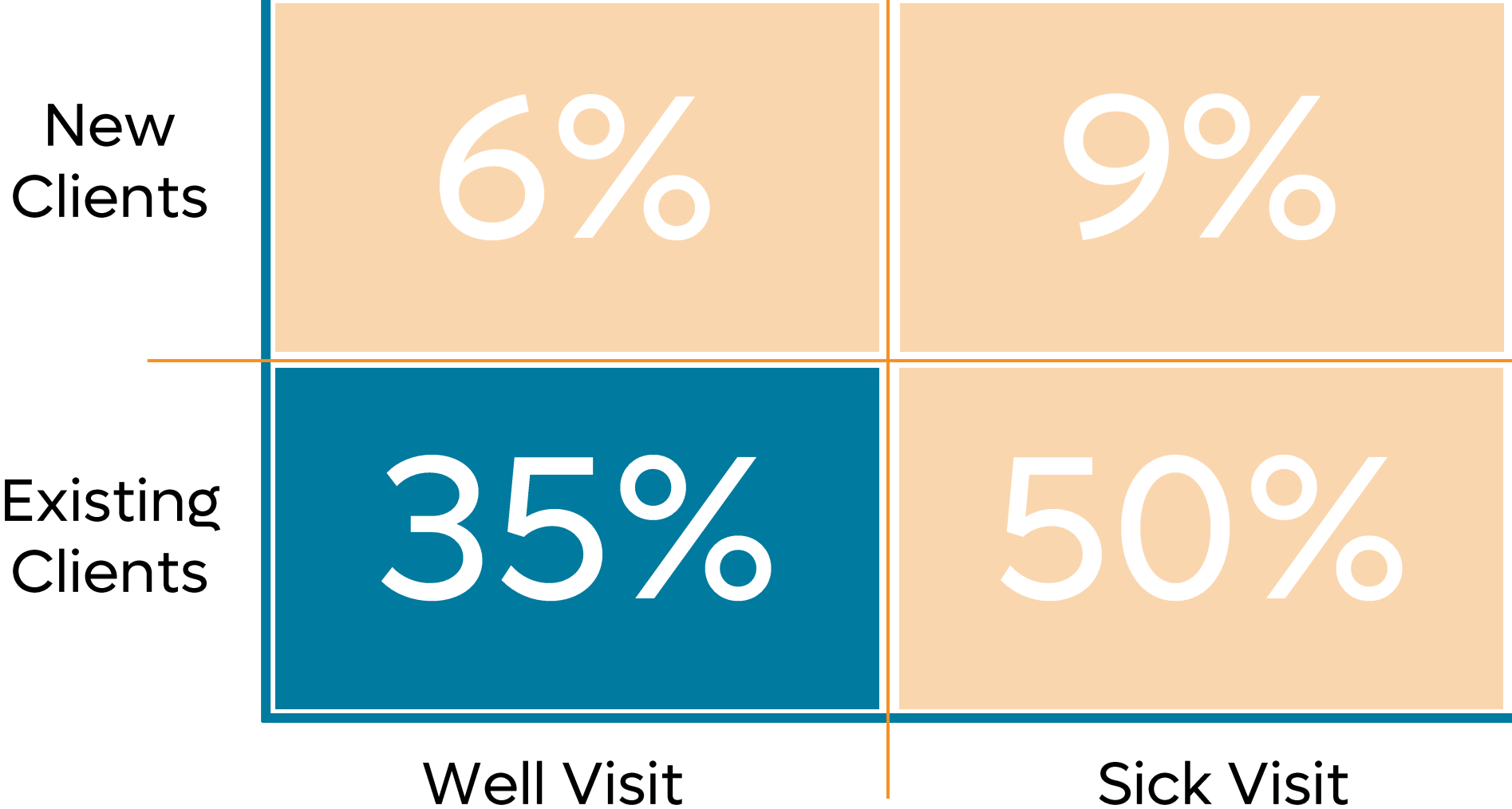


The Growth Linchpin

Wellness Reminders



The Client/Visit Matrix





Is Your Practice's Compliance Rate <80%?

If So, There Is Room For
Improvement In Your Process.



Make Technology Work For You!

Clean Data
+ Solid Setup

Repeat Visits

1

Accurate Client Contact Information

2

Proper Reminder Setup in Your PIMS

2b

Sensible Line-Item Descriptions

3

Proper Communication Setup/Plan

What Should We Set Up Reminders For?

1

Vaccinations

Pet owners still overweight importance

2

Annual/biannual exams

Proceed with caution...

3

Recommended, elective procedures

A good way to kick the February “dental month” habit

4

F/T/H Prevention

Otherwise, Chewy shareholders will thank you

What Should We Set Up Reminders For?

5

Chronic condition follow-ups

6

Wellness Diagnostic Tests

Proceed with caution...

Line Item Descriptions

Distemp D A 2 P P Vaccine

Make Reminders a Team Effort!

Team “buy-in” is incredibly important for driving a successful reminder program.

Everyone should be familiar with the **‘what’**, **‘when’**, and **‘who’** of your effort!

Align around the ‘Why’

- Receptionists and technicians, alike, need to understand the practice’s clinical priorities
 - They are your messengers with clients!
- Receptionists and technicians, alike, need to understand the financial importance of client retention
 - A strong revenue base supports things like wage increases, new equipment, etc.!

Review as a Team

- Once a year, the veterinarian(s) should review the practice’s wellness protocols by species and age
- Pay particular attention to wellness diagnostic protocols

How Are We Reminding?

Emails

- Cost-effective
- Strong visibility – your message will be seen
- Easy to “set and forget”

Postcards

- Tried and true...and completely automatable
- Helps extend reach – remember the math!

Text Messages/Push Notifications

- Simple with most communication platforms
- Exceptional “open” rates

Phone Calls

- The most effective method
- The most despised method...by staff



There are NO good reasons to exclude a channel.

Your Recipe for Phone Call Reminder Success!

1

Pick the Right Caller

We want bubbly and knowledgeable.

2

Set Your Caller Up for Success

Schedule outbound call time, preferably in a quiet spot where inbound calls/clients won't present a distraction.

3

Don't Fear Voicemail

4 out of 5 calls will end in voicemails. Have a script/template ready for those.

- Mention closing time
- Target relief/new DVM books



When Should You Remind?

- **Many practices are too conservative with their reminder calendars**
 - There is a big difference between sending too many marketing messages and sending too many medically-recommended reminders
- **Spread out your “touch points” around the reminder’s due date**
 - For example, 3 weeks before through 3 months after
- **Don’t forget: not everyone will receive or see every communication!**



Try to strike a balance across your communication mediums



A Sample Reminder Calendar

Date of Communication	Communication Method
2 Weeks Prior to Due Date	Postcard #1 & Email #1
1 Week After Due Date	Phone Call #1
2 Weeks After Due Date	Email #2
6 Weeks After Due Date	Phone Call #2
8 Weeks After Due Date	Postcard #2 & Email #3
12 Weeks After Due Date	Phone Call #3



Is That Really Too Much?

Email Addresses	Email Open Rate	Mailing Addresses	Phone Numbers
73%	58%	82%	98%

- **Let's say you only send emails: 42% know to come in**
- **Let's say you send emails and postcards: 89.6%**
- **Let's say you send emails and postcards and make phone calls: 99.8%**
 - **Only 33.8% probably get all three by a week post-due date...**

Three Things to Do TOMORROW!



1

Schedule a Staff Meeting

2

Systems Audit PIMS & Communications Platform

3

Institute/Revisit Reminder Phone Calls



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Thank You!

Do you have any questions?

