



CareVet[®]

MARKETING PLANNER



A comprehensive marketing
planner for Q1 and Q2 of 2024.

Why Plan?

We know you work diligently every day to provide best-in-class care to every patient. Our goal is to support this mission. These marketing initiatives are to increase compliance of pets in your community, educate your clients on preventive healthcare and to give your clients the resources they need to afford the care their pet deserves.

If you'd rather go over this together...

Feeling overwhelmed or confused? Let's review this together and discuss what would be best for your hospital. I will be holding ZOOM office hours at the times specified below (click in this box to launch zoom meeting):

- December 12, 13 & 14th from 8 am – 9 am CT

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What Will 2024 Planning Include?

This section drills into the various components of our 2024 Marketing Planning. We take you through each initiative and explain what it is and why we want to pursue it during the upcoming year. No action is needed here, in the next section of the planner you will determine more specifics.

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2024 Selections

Now that you've had an overview of what we are planning for and the goals of our Q1/Q2 initiatives, we are asking you to make selections. This section is where you will determine the specifics of your marketing plan.

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Next Steps

You've determined your marketing plan for Q1 and Q2- the hardest part is done! We've created a checklist of action items for you and us that will turn these plans into reality over the next several weeks and beyond!

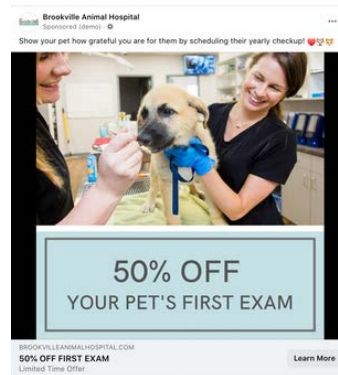
What will 2024 planning include?

An overview of what we are planning, our goals and our asks.

New Client Offer

- We typically encourage you to adopt an ongoing new client offer, especially if you're interested in driving new client traffic.
- We use these offers in the digital ads we manage for your hospital on Facebook, Google and Bing.
- Digital ads are targeted – we can reach your ideal type of customer. Additionally, digital ads are extremely easy to modify and adjust as needed.
- The goal of digital ads is to drive the right amount of new clients to your hospital each month. If your hospital hires a new DVM or needs some help reaching your revenue goal, ads can help.

Facebook Ad



Google Ad

Ad · www.vetstopanimalclinics.com

50% Off First Exam | Vet Stop Animal Clinic

Pet Care Can Be Complicated - Find A Partner You Trust! Get 50% Off Your Pet's First Exam. Curbside Drop-Off Service.

Ad · www.rrahvets.com

Niskayuna Pet Grooming | Professional Grooming Services

Bathing, Grooming, Nail Clipping, and More. Schedule Appointment Now! Let Our Professional Dog Groomers Take Care Of All Your Pet's Grooming Needs.

Client Referral Programs



- Client referrals can increase the loyalty of existing clients and generate new client growth, especially with the right materials.
- We want to establish a referral program if you do not have one and provide you with literature to promote the program to clients.

Lapsing Client Outreach

- Lapsing clients are clients that have received PetDesk health service reminders, have at least one pet that is out of compliance and have not scheduled an appointment in the past year.
- Our goal is to get these patients back in compliance!
- PetDesk already automates health service reminders (when clients are coming due) and a lost client finder (when a client reaches 18 months since their last transaction), but we want to add one more lapsing client outreach per quarter to incentivize this audience to come back.



Dental Health Marketing



We recommend adopting an ongoing promotion to encourage clients to schedule their dental procedure at the time of their wellness or oral exam when it is recommended to them. This discount would be applied to the dental procedure at the time of completion but can be offered during the wellness/oral exam as a way to motivate clients to book their future procedure.

Quarterly Promotions/Flash Sales



- Short-term promotions are a great way to increase awareness and compliance for a particular service.
- These promotions usually involve a small discount on particular services and are accompanied by social media posts, email blasts, physical signage and verbal recognition to generate awareness.
- The goal of these is to educate clients on proper pet care and drive incremental revenue.
- We want to plan these promotions in advance so we can generate more awareness amongst staff members and clients.

Preventative, Parasiticide & Other Product Marketing

- Many of you have asked for help promoting products in addition to services. During 2024 we plan to develop more content that educates clients about preventatives, pet foods, etc., that you encourage clients to purchase.
- Since every hospital prefers different products, we want to collect information on which products your hospital would like to promote.
- We will preview this content in the Monthly Marketing Update as usual and you'll have the opportunity to opt-out of the product posts at that time.



New Client Offer for Ancillary Services

- If your hospital offers ancillary services such as boarding, daycare or grooming, you might consider running an offer for these to encourage existing clients to try out a new service or attract entirely new clients to try out these services.
- If you choose to participate in a new client offer for ancillary services, we will use that offer in digital ads to promote these services.
- These are ongoing offers (not just for a specific month or set timeframe). If you choose to discontinue them, please notify us.



Planner continued on next page ->

CareCheck 2.0

CareCheck 2.0 was introduced in September of 2023 and is an extension of our original CareCheck program with the goal of getting lapsed clients to return to the hospital.

How does it work?

Step 1: Obtain a List of Out Of Compliance Clients

First, we extract the list of clients from the PetDesk compliance dashboard. This report shows all non-compliant clients who received their final Health Service Reminder 3 weeks to 6 months ago and have not scheduled an appointment. We consider clients to be non-compliant if they have not scheduled an appointment within three weeks of receiving their final PetDesk-automated HSR through text message, email, push notification or postcard.

Step 2: Scrub the list for clients that have opted out and remove duplicates

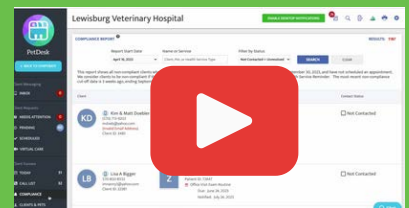
We thoroughly scrub the list for any clients that have previously opted out and remove duplicate phone numbers so clients should never receive more than one ringless voicemail message at a time. Our team does a thorough QC before proceeding.

Step 3: Initiate staggered ringless voicemail messages + follow-up text

Once your hospital's list is finalized, we will run your contacts through our tool to trigger the ringless voicemail and text message to the client's phone. We do this in small groups to stagger these and ensure response is spread out over a couple of days.

Tip!

Have one of your CSRs review your compliance dashboard often to ensure accuracy. Click the video below for a tutorial.



Voicemail Script:

"Hi, this is [clinic name], and we are calling because we see that your pet is overdue for services. Please give us a call back at [number] or visit [website] to book an appointment today!"

Text Message Script:

This is [clinic name]. We are reaching out because your pet is overdue for important health services. To book an appointment, use the following link: [vetstoria/petdesk link] or give us a call/send us a text at [clinic phone number]."

Reply STOP to opt out of messages from this phone number.

Please note! We conduct this process every other week or 2x per month. Clients that have received 5 calls get downgraded to one call each month. Please see the 2024 calendar on the next page.

CareCheck 2.0 1H2024 Calendar

Highlighted green in the calendar below are the dates we have planned to conduct CareCheck 2.0 calls during the first half of 2024. Please note that dates are subject to change, but we will send a notice in advance if they do.

Please save these dates and ensure your team is aware there may be a larger inbound call volume during these times.

2024

January

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

April

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

CareCheck 3.0

CareCheck 3.0 is a new program set to kick off in early 2024. We know you work hard to educate pet owners about health services that their pet is overdue for or coming due for, but it can be difficult to cover all topics when you are short on time during the appointment. This program will be an effort to proactively text message clients before their appointment about adding services their pet is overdue for or coming due to prime them for their exam.

How does it work?

Step 1: Extract Target Audience

First, we will extract the information from PetDesk on what clients are coming in for wellness appointments over the next week.

Step 2: Send these clients a pre-appointment text message

After a thorough QC, our team will run your contacts through our tool to trigger a pre-appointment text message that follows the script below!

Text Message Script:

We hope this message finds you well. Your upcoming appointment for [Pet Name] is scheduled for [Appointment Date] at [Appointment Time]. To ensure your pet receives comprehensive care, we strongly recommend addressing any overdue or coming due wellness services during your appointment. We love healthy pets and saving you an extra trip.

Additionally, we can check to see if their siblings are due for wellness services and attempt to accommodate them as well.

If you would like more information, please respond with “learn more.”

Thank you, and we look forward to seeing you and your pet soon!

Step 3: Have your reception team monitor incoming messages + respond as needed!

If a client texts LEARN MORE

Your hospital will receive a text message from the client's number with the patient's name and appointment date/time. Please reply to the client with a summary of what they are overdue for or coming due for and what sibling needs to be seen if applicable. Engage in discussion with the client to either add these services/siblings to their upcoming appointment or schedule a different visit accordingly.

Additional services may also include med refills or prevention refills (for pet and housemates) and recurring injections (like Cytopoint). Engaging in this discussion with the owner BEFORE their visit will help the appointment be more efficient and comprehensive. **Reference your CareCheck for this step!**

2024 Selections

Please use our digital form to submit your selections. [CLICK HERE!](#)

New Client Offer

Choose 1:

Option 1

\$10 Off Pet's First
Wellness Exam
(New Clients Only)

Option 2

\$25 Off First
Wellness Exam
(New Clients Only)

Option 3

\$50 Off First
Wellness Exam
(New Clients Only)

Option 4

50% Off First
Wellness Exam
(New Clients Only)

Client Referral Programs

Choose 1:

Option 1

\$10 Off First Exam for
New Client,
\$20 Credit for Existing
Client (referrer).

Option 2

\$25 First Wellness Exam
for New Client,
\$20 Credit for Existing
Client (referrer).

Option 3

\$50 First Wellness Exam
for New Client,
\$20 Credit for Existing
Client (referrer).

Option 4

50% Off First Exam for
New Client,
\$20 Credit for Existing
Client (referrer).

Lapsing Client Outreach

Choose 1:

Option 1

\$25 Off Total at Next Visit

Option 2

Free Nail Trim with Wellness Exam

Dental Health Marketing

Choose 1:

Option 1

\$25 off a dental procedure when
booked at the time of wellness/oral
exam

Option 2

Your own dental health offer.

*Dental procedure includes anesthesia, radiographs, scaling, polishing, etc.

Quarter 1 (Promo Runs Feb & March)

Choose 1:

Option 1
\$15 Off Oral Exam

Option 2
\$25 Off Dental
Procedure*

*Dental procedure includes anesthesia, radiographs, scaling, polishing, etc. Either of these can be combined with the Dental Marketing push.

Quarter 2

During Q2 of 2024, we will focus on promoting parasiticides and leveraging vendor offers in Greenline. Please indicate whether your hospital uses Greenline in the digital form linked below. If you do not use Greenline but want to enroll, please get in touch with info@greenlinepet.com. Please note that Zoetis is not currently partnered with Greenline, so we are in the process of working on a different program for hospitals that want to promote their offerings but may not be able to offer a discount to clients on their products.

We will also ask you to specify what products and brands of parasiticides you would like to promote during Q2 to ensure we are only promoting what you carry.

Flash Sales

Option to participate in one or multiple:

Spring Sale
Free heartworm test
with visit (April 15-19)

Memorial Day Sale
\$10 Off Microchips
(May 28-31)

Summer Solstice Sale
10% Off Vaccines Only
(June 17-24)

New Client Offer for Ancillary Services

Choose 1:

Option 1
Free First
Night of Boarding

Option 2
Free First Day
of Daycare

Option 3
\$10 Off
First Groom

**And a few more more questions...CLICK HERE TO
ACCESS THE DIGITAL FORM & COMPLETE BY 12/22.**

Next Steps

What happens now that I've made my selections?
(Bolded items are your to-do's and the rest is ours!)

Digital Ads

- ☐ • **Communicate the new offer with your team (if this is a new offer).** The offer you chose should only be given to new clients who mention it during their visit!
- ☐ • **Set up a discount code in your PIMS: NewClientAd10Off, NewClientAd25Off, NewClientAd50Off- this is very important for us to track usage.**
 - If we're not already running ads for you, we'll launch your ads on January 2 - ads will reflect your new client offer if you chose to participate in one.
 - Ads run indefinitely and will only be modified if you reach out to us and make a request. Remember, each month we set a budget for your ads that reflects your capacity for new clients.

Client Referral Programs

- ☐ • **Communicate the new client referral program to your team.**
- ☐ • **Adjust your new client form to include a question about how people heard about your hospital and give them the option to id an existing client.**
- ☐ • **Set up a discount code in your PIMS: ClientReferral10Off or ClientReferral25Off - this is very important for us to track usage. We only track new client redemptions, so no need to give us the existing client discount code.**
 - Order client referral cards to your hospital and begin passing them out to each customer during their visit to promote the new program. You can order these on the branded marketing goods website.
 - We will add this offer to your website if we manage it.

Lapsing Client Outreach

- ☐ • **Communicate the lapsing client incentive to your team.**
- ☐ • **Set up a discount code in your PIMS: LapsingClient25Off or LapsingClientTNT - this is very important for us to track usage.**
 - We will send a targeted email to this audience during the first month of each quarter: January, April, July and October.

Dental Health Marketing

- ☐ • **Communicate the dental marketing promo to your team.** This initiative relies heavily on your staff communicating the offer with clients who may benefit, so make sure you emphasize the importance to your staff.
- ☐ • **Set up a discount code in your PIMS: 25OffDentalProcedure this is very important for us to track usage.**
 - We will add this to your website if we manage your site.

Quarterly Promotions

- ☐ • **The Quarter 1 promotion you selected will run during February and March. It is extremely important that you discuss the quarterly promotions with your teams.**
- ☐ • **Set up a discount code in your PIMS: 15OffOralExam, 25OffDental Procedure before the start of the promotions – this is very important for us to track usage.**
 - We will create the social media, email, and physical signage for your chosen promotion and continue to preview this in our monthly marketing newsletter.
 - We will add this to your website during the timeframe it is running if we manage your site.

Flash Sales

- ☐ • **The Flash Sales you selected will run during the timeframes specified above. It is extremely important that you discuss the flash sales with your teams in advance!**
- ☐ • **Set up a discount code in your PIMS: FREEHW, 10OFFCHIPS, 10OFFVAX before the start of the promotions – this is very important for us to track usage.**
 - We will create the social media, email, and physical signage for your chosen promotion and continue to preview this in our monthly marketing newsletter.
 - We will add this to your website during the timeframe it is running if we manage your site.

New Client Offer for Ancillary Services

- ☐ • **Communicate the new offer with your team (if this is a new offer). The offer you chose should only be given to new clients who mention it during their visit!**
- ☐ • **Set up a discount code in your PIMS: BoardingFreeFirstNight or DaycareFreeFirstDay or 10OffGrooms– this is very important for us to track usage.**
 - This offer and corresponding ads run indefinitely and will only be modified if you reach out to us and make a request. Remember, each month we set a budget for your ads that reflects your capacity for new clients.
 - We will add this to your website if we manage your site.

Everything Else!

- CareCheck 2.0 (i.e. Automated Compliance Calls)
 - Please review the program and calendar for 2024 above.
- CareCheck 3.0
 - Please review details about a brand new program kicking off in early January above.

Please allow us until December 31st to respond to questions and send out a summary of your responses for you to keep on file.

Final selections must be submitted by December 22 via our digital form located [HERE!](#)

Thank you for completing the
2024 Marketing Planner!