



# CareVet<sup>®</sup>

## MARKETING PLANNER



A comprehensive marketing  
planner for Q3 and Q4 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):

- June 11, 12 & 13th from 8 am – 9 am CT

## Table of Contents

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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 Q3/Q4 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 Q3 and Q4- 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!

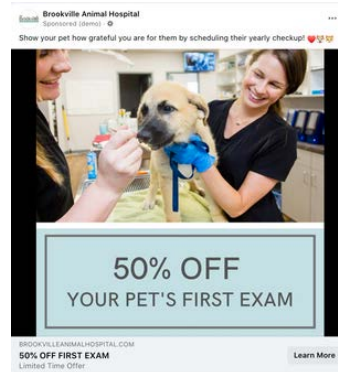
# What will 2024 planning include?

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](http://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](http://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.

# 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.

## Same Day Appointments, Schedule Permitting



- If your hospital is able to take same day appointments, schedule permitting, we recommend promoting this!
- This is a great way to increase client satisfaction by offering prompt care for their pets during times of need.
- This can be a differentiator between you and local competitors! If you're struggling to attract new clients, this may set your hospital apart from the rest.
- This is a fantastic way to drive visits if you're struggling with lower market demand.

## Community Involvement

- Community events are a helpful way to increase your hospital's exposure, especially if you have been struggling to stay busy.
- These require effort from your team to plan and coordinate but can be a worthwhile time investment.
- CareVet's Marketing team will help you spread the word and can lend a hand in the planning process by developing checklists and offering guidance from past experience.





# 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***

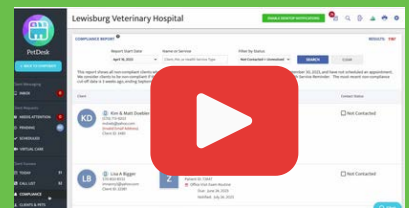
We thoroughly scrub the list for any clients that have previously opted out and remove duplicate phone numbers so clients should never receive more than one ringless voicemail message at a time. Our team does a thorough QC before proceeding.

### ***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 2H2024 Calendar

Highlighted green in the calendar below are the dates we have planned to conduct CareCheck 2.0 calls during the second 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.

## July

| 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 |    |    |    |

## August

| 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 |

## September

| 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 |    |    |    |    |    |

## October

| 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 |    |    |

## November

| 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 |

## December

| 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 |    |    |    |    |

print-a-calendar.com

# 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).

## Quarterly Lapsing Client Outreach

Choose 1:

### Option 1

\$25 Off Total at Next Visit

### Option 2

Free Nail Trim with Wellness Exam

## Ongoing 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.

# Wellness Wednesdays

Receive a free heartworm test for canines or free feline leukemia tests for felines with the purchase of a wellness exam. Additionally, clients who come in and mention the offer will receive a \$25 credit to be used at their next appointment within six months. This is up to a \$100 value.

## Summer Visit Drivers (July/August)

Participate in one or both:

### Concert Giveaway

Clients who visit your hospital for a wellness exam during July will be entered for a chance to win four front section tickets to [P!NK/Other Artist]! We will also donate \$1 per exam to the ASPCA.

### Paws and Save Fridays

Every Friday in August, clients can receive \$25 Off Wellness Exams.

## September Sale

Choose 1:

### Option 1

\$15 Off  
Bloodwork Panel

### Option 2

\$15 Off Feline  
Wellness Exam

## Q4 Flash Sales

Option to participate in one or multiple:

### Halloween Sale (Oct 28 - Nov 1)

\$25 Off Dental  
Procedures Booked  
within promo period  
and completed before  
December 31st.

### Early Black Friday Sale (November 18-22)

\$25 Off Spay/Neuter  
Procedures Booked  
within promo period  
and completed before  
December 31st.

### Healthy Holiday Sale (Dec 9-13)

Stack the savings - get  
\$25 off on wellness exams  
for 1 pet, \$50 for 2, etc.

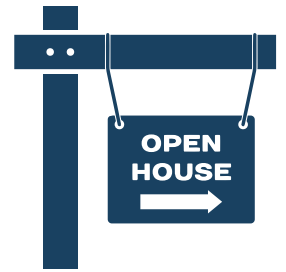


# Community Involvement Ideas

If your team is looking for more ways to drive visits and get involved with increasing your hospital's reach in the community, here are a few other ideas that require a little extra work on your end but can have a lasting benefit on your community and help build your client base! **Please email [marketing@carevethealth.com](mailto:marketing@carevethealth.com) with your event details at least four weeks in advance so that we can help you get the word out!**

## Host an Open House

If you recently hired a new doctor or have done some upgrades to your hospital, an open house is a great opportunity to show them off! Choose a Saturday afternoon this summer to host a 2-hour open house. Make sure all doctors and most of the team can be there! Engage your vendor partners about sponsoring a food truck, entertainment (face painter or balloon artist), or some raffle items.



## Host a Party In the Park with other local pet businesses



Whether it's in an actual park, a local dog park, or your hospital's parking lot, get 5-10 other businesses to host a Saturday afternoon event this fall. Have everyone set up a table or a booth, bring some literature, swag, etc. Serve light refreshments, play music, and offer raffles or door prizes to attendees. Make sure all businesses promote this event to their clients to increase attendance!

## Host a Trunk or Treat with Costume Contest

This October, invite other local businesses to join you in your parking area for a trunk or treat event. Encourage trunkers to bring brochures, candy, games (cornhole, ring toss, candy guess), offer fun prizes for best dressed pets, decorations and more.

**TIP:** If you don't want to host a trunk or treat event but want to participate, purchase a few pet costumes & a polaroid camera and offer spooky pet photos at appointments all October

## Host a pet food drive in partnership with a shelter

This November, partner up with a local shelter and collect donations of dry or canned pet food. Sweeten the deal for clients by offering 50 free PetDesk loyalty points for every donation. At the end of the month, be sure to take the donated items to the local shelter and capture a photo of your team & theirs together, then share it on your hospital's social media page.

# Host a Vaccine Clinic

For one day (weekend day recommended), offer discounted rabies vaccines. While clients are there, check to see if their pet is overdue on other vaccines and work to get them up to date on everything. Offer microchips at that time as well. Schedule shorter appointment blocks that day to fit in more clients, or if comfortable, make it first come, first served. Make sure CSRs schedule follow up appointments for complete wellness exams.



## Offer a Free Puppy Training Series

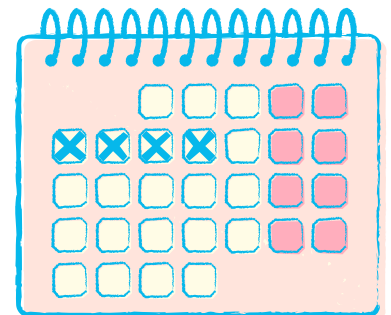


Choose a weeknight that is typically not very busy and host small group puppy training lessons free of cost. Have a knowledgeable team member teach clients the basics of training their puppy. Make sure that those coming to the workshops know about your puppy services, from vaccines to spays and neuters. Work to get them booked in for these services.

## Spirit Week

This one is for your patients! Choose a week and offer discounted services each day, mixing it up as you go, to drive business:

- Microchip Monday: \$10 Off Microchips
- Toe Nail Trim Tuesday: \$10 Nail Trims
- Wellness Exam Wednesday: \$40 Exams
- Tooth Thursday: \$25 off dental procedures scheduled within a month of today.
- Flea & Tick Friday: Promote Greenline Offers OR offer 15% off purchase of 6 months of flea, tick, heartworm prevention purchased in-clinic.
- Senior Pet Saturday: \$15 Off Bloodwork Screenings



## Paw Print Ornaments

Offer a 1-day workshop or offer these all of December! Purchase model magic, twine and acrylic paints. Press the pet's paw into a small piece of clay and poke a hole through the top for the twine. Allow it to set before painting (option to send clients home with a small kit to complete later if offering this during exams). Option to charge \$3 - \$5 for this "add-on."

# Next Steps

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

## New Client Offer/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/your New Client Offer, we'll launch your ads on July 1 - ads will reflect your new client offer if you choose 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 there is 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: 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.**

# Promotions

- ☐ • **Wellness Wednesdays are scheduled to run through August 31, 2024. The Summer Giveaway will be for July only, the Summer Paws and Save Fridays are for August only. The September Sale is for September only. It is extremely important that you discuss the quarterly promotions with your teams.**
- ☐ • **Set up a discount code in your PIMS: WELLWED for Wellness Wednesdays. For Paws and Save Fridays, create \$25OFFFRI. For September's Sale, create either 15OffFelineExam or 15OffBloodwork. No code is needed for the Summer Giveaway. Please create these 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: 25OFFDENTALPROCEDURE, 25OFFSPAYNEUTER, 25OFFEXAM 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.

# Community Events

- ☐ • **At your next team meeting, discuss these ideas with your team. See if anyone enjoys planning events and consider choosing 1 or 2 to have them work on. Planning ahead is key!**
- ☐ • **Once you decide what (if any) events you plan on hosting, decide on a date or date range. Give yourself plenty of time to coordinate with vendors. Email [marketing@carevethealth.com](mailto:marketing@carevethealth.com) with your event details.**
  - Marketing will begin promoting your event about a month in advance via social media, emails and on your website. We can also help you create in-clinic signage to promote this further.
  - If your team would like to meet and discuss event logistics, we are happy to set up time to discuss.

# Everything Else!

- CareCheck 2.0 (i.e. Automated Compliance Calls)
  - Please review the program and calendar for 2024 above.

***Please allow us until June 30th to respond to questions and send out a summary of your responses for you to keep on file.***

Final selections must be submitted by June 21st via our digital form located [HERE!](#)

Thank you for completing the  
**2024 Marketing Planner!**