



CareVet[®]

MARKETING PLANNER



A comprehensive marketing
planner for Q1 and Q2 of 2025.

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 11, 12, 17, 18 from 8 am – 9 am CT

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What Will 2025 Planning Include?

This section drills into the various components of our 2025 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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2025 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!

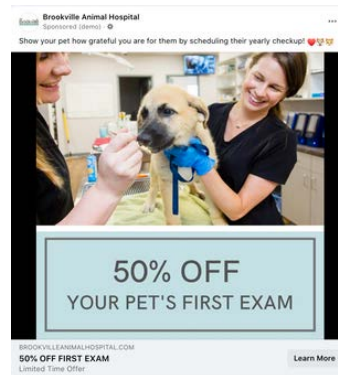
What will 2025 planning include?

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.



Mid Week Offer



A mid-week incentive like "Wellness Wednesday" is a smart strategy to encourage clients to schedule routine care on days that might otherwise see lighter appointment volumes. Offering an ongoing discount or perk for services completed mid-week can help balance your clinic's schedule, maximize staff efficiency, and reduce the risk of bottlenecks on busier days like Mondays or weekends.

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.

Short Term Offers



- 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

- To help promote products, 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.

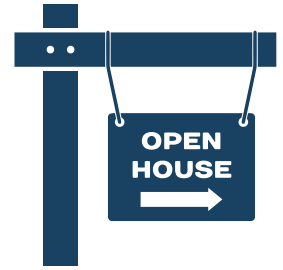


Community Involvement (continued on next page)

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 with your event details at least four weeks in advance so that we can help you get the word out!**

Host an Open House

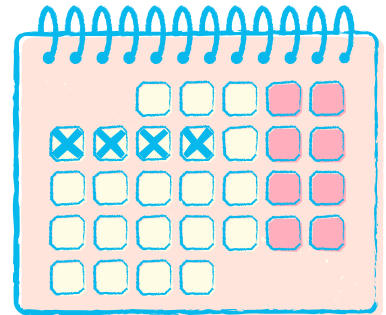
If you recently hired a new doctor or have done some upgrades to your hospital, an open house is a great opportunity to show them off! Choose a Saturday afternoon this Summer to host a 2-hour open house. Make sure all doctors and most of the team can be there! Engage your vendor partners about sponsoring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



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



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.

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. If you participate in DVMReach calls, please opt out of this as they are redundant with this program.

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

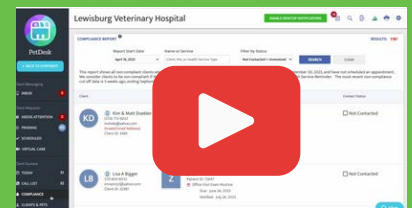
We thoroughly scrub the list for any clients that have previously opted out and remove duplicate phone numbers so clients should never receive more than one ringless voicemail message at a time. Our team does a thorough QC before proceeding.

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!"

Please note! We conduct this process every other week or 2x per month. Clients that have received 5 calls in the past 6 months get removed.

Please see the 2025 calendar on the next page. ->

CareCheck 2.0 1H2025 Calendar

Highlighted green in the calendar below are the dates we have planned to conduct CareCheck 2.0 calls during the first half of 2025. 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.

2025

| 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 | |

| March | | | | | | |
|-------|----|----|----|----|----|----|
| S | M | T | W | T | F | S |
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| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | | | | | |

| April | | | | | | |
|-------|----|----|----|----|----|----|
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| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | | | |

| May | | | | | | |
|-----|----|----|----|----|----|----|
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| 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 | | | | | |

Ongoing Offers (long term)

New Client Offer

Choose 1 (we recommend sticking with current offer if you have one!):

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 (we recommend sticking with current offer if you have one!):

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

Mid-Week Offer

Choose 1:

Option 1

Receive a free heartworm test for canines OR a free feline leukemia test for felines with the purchase of a wellness exam on [Day of Week]!

Option 2

Receive a free heartworm test with the purchase of 12 months of preventative on [Day of Week]!

We will also have you choose a preferred day of week.

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.

Short Term Offers

Quarter 1 (Promo Runs Feb & March)

Choose 1:

Option 1

\$15 Off Dental 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 late Q1 and Q2 of 2025, we will focus on promoting parasiticides and leveraging vendor offers in Greenline. Please indicate whether your hospital uses Greenline in the digital Marketing Planner form. 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:

New Year, New Health Goals
\$25 Off Wellness Exams (Jan 1- 15)

Spring Into Health Sale
Free heartworm test with the purchase of 12 months preventative (April 7-18)

TIP:
Opt out of the April Sale if you choose to participate in a mid-week offer to avoid redundancies.

Microchip Madness
\$10 Off Microchips (May 1-15)

Scratch Free Summer
\$25 Off Itchy Pet Exams (June 9-20)

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

- ☐ • **Communicate the 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. We will also add this to your website.
 - 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: January, April, July and October.

Mid-Week Offer

- ☐ • **Communicate the mid-week offer to your team.**
- ☐ • **Set up a discount code in your PIMS: WELWED OR MIDWK - this is very important for us to track usage.**
 - We will add a popup to your website and create social media posts + emails to promote these offers.

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.**
- ☐ • **Communicate this offer to your clients when you make the recommendation to complete a dental procedure.**

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 social media posts and emails for your chosen promotion and continue to preview this in our monthly marketing newsletter.

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: NY25, FREEHW, MICMAD, ITCHY25 before the start of the promotions – this is very important for us to track usage.**
 - We will create social media posts and emails for your chosen promotion and continue to preview this in our monthly marketing newsletter.

Everything Else!

- CareCheck 2.0 (i.e. Automated Compliance Calls)
 - Please review the program and calendar for 2025 above.
- Complete the PCS Marketing Planner If you offer pet boarding, daycare or grooming!

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 20 via our digital form located [HERE!](#)

Thank you for completing the
2025 Marketing Planner!