

## How To Conduct Effective Reminder Calls & Callbacks

Add follow-up calls and watch your compliance and revenue soar



by Wendy S. Myers  
[www.csvets.com](http://www.csvets.com)

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## How to Use This Training Guide

This training program was designed to help your veterinary team implement effective callbacks. Your staff can dramatically improve patient care and generate revenue from missed opportunities. Use this workbook and the accompanying audio seminar for individual learning or during a staff meeting. Schedule a team meeting to discuss what type of follow-up calls your clients need. For consistent client communication, designate specific staff members who will make callbacks part of their daily priorities.

**Use the staff meeting discussion worksheet at the end of this training guide for your team to successfully organize a callback program.**

## About the Author

**Wendy S. Myers** owns Communication Solutions for Veterinarians in Denver, Colorado and consults with veterinarians and industry on client service, marketing and hospital management. She is the author of three books, *How to Conduct Effective Reminder Calls & Callbacks*, *The Veterinary Practice Management Resource Book & CD* and *Your High-Performance Practice: Building Stronger Client Relationships Through Superior Pet Care*.

Wendy has produced five videos, including:



- ***Twice-a-Year Wellness Exams & Vaccination Solutions: An Educational Program for Practitioners & Staff***  
— Fort Dodge Animal Health, 2005
- ***Excelling at Client Service & Conflict Resolution***, a three-video series  
— Pfizer Animal Health, 2004-2006
- ***Protecting Pets, Protecting People: Your Resource Guide to the Prevention of Zoonotic Disease***  
— Merial, 2002

For five years, Wendy served as editor in chief of *Veterinary Economics*, an award-winning monthly business magazine for veterinarians. She shares her expertise through writing for veterinary journals and speaking at veterinary conferences and colleges on receptionist training, client service, effective marketing and hospital management. She has taught marketing communications in the master's degree program at Colorado State University. Wendy is a past national president of the Society of Professional Journalists. She is a proud Mom to a 20-year-old Siamese-Manx cat named Ollie.

Special thanks to our seminar voice talent, Debbie Arvanitis as the receptionist and Alan Roach as our announcer.

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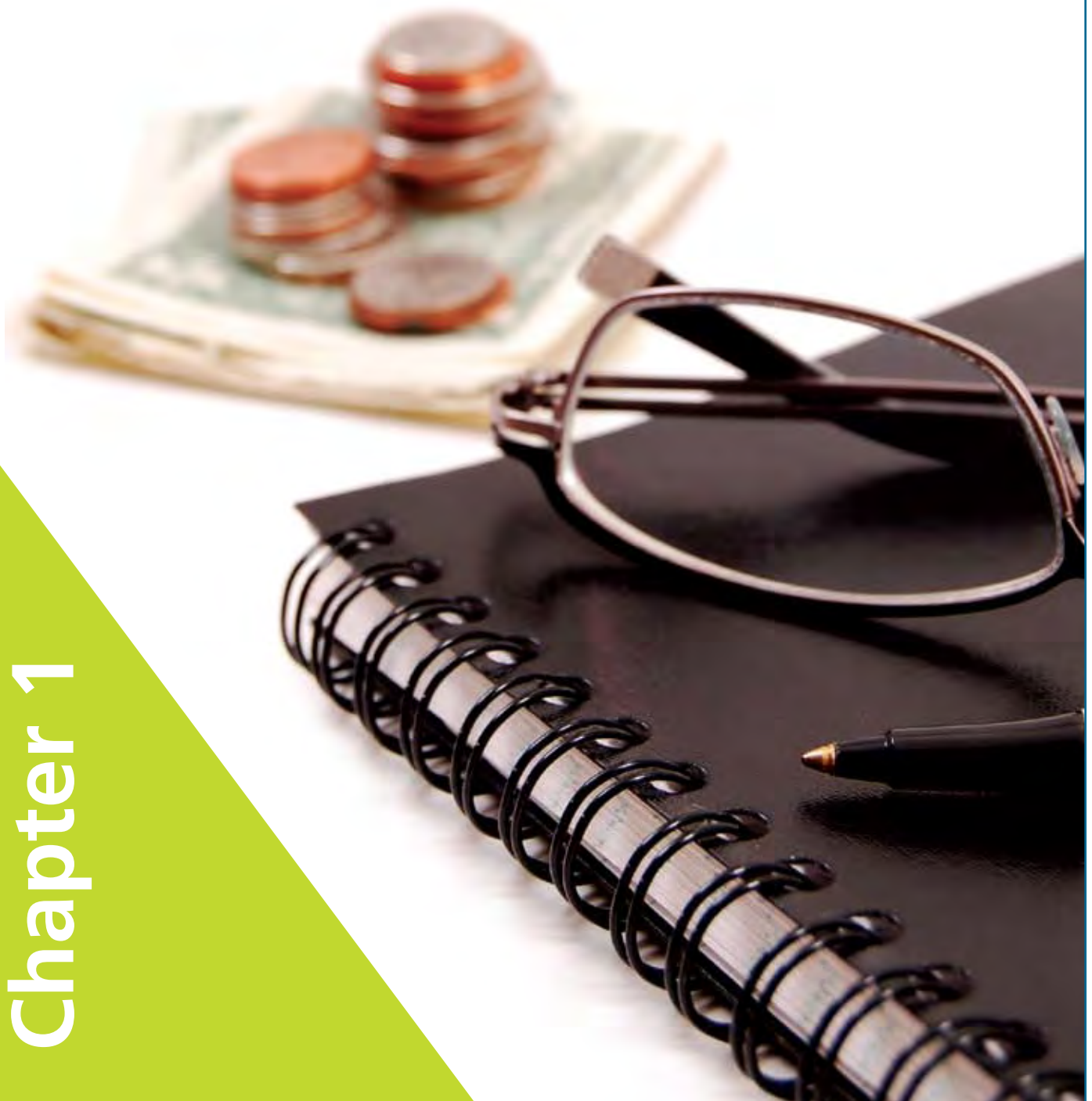
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# Understanding the reminder cycle and need for **follow-up calls**

## Chapter 1



Could your practice afford to lose 200 patients per month? If you send only one reminder postcard, that's the risk. A two-to-three doctor practice mails an average of 500 reminders each month. If 60 percent of clients schedule appointments, 200 are left behind. To be a strong patient advocate and protect practice income, you need a multi-tiered reminder system. As a veterinary consultant, I recommend a three-tiered approach and sending reminders weekly:

- **First reminder** is sent three weeks before the due date.
- **Second reminder** is sent two weeks after the due date.
- **Third reminder** is a phone call three weeks after the due date.

If you mail a second reminder to 200 clients and another 60 percent respond, that leaves only 80 patients remaining overdue. Let's say you have four receptionists. Divide the list of 80 among them, giving each receptionist 20 people to contact. Although each has the entire month to call 20 clients, I would ask a team member to call just one or two per day. This makes the task seem less overwhelming and easier to manage.

## Making reminder calls for pets overdue for services

*Veterinary Economics'* research shows 70 percent of clients respond to phone calls, so have receptionists **call between 5 and 7 pm on weekdays and 9 to 11 am on Saturdays.** You're more likely to catch clients arriving home from work during the week or on Saturday mornings before weekend errands. Phoning during these opportunistic windows is important to reach clients who have already overlooked two notices about their pets' needed veterinary care.

Finding time for staff members to make one or two reminder calls each day can be challenging during high-traffic times of weekday evenings and Saturday mornings. But the effort earns immediate rewards. One reminder call will take a receptionist 30 seconds to 2 minutes. Considering the average charge per doctor transaction is \$148, isn't it worth a few minutes of a staff member's time to secure an appointment? If the receptionist schedules one appointment for an overdue patient each day, she could increase practice income up to \$800 per week!

Some receptionists may shy away from calling clients, claiming they feel like telemarketers. But that's simply not true. The 2003 American Animal Hospital Association (AAHA) compliance study, *The Path to High-Quality Care*, found **78 percent of clients surveyed wanted to be called** about overdue vaccines and medication but only 52 percent actually received a call. Receptionists are calling as patient advocates. After all, the family pet can't read his mail and pick up the phone to schedule an appointment!

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patient advocates.

When receptionists call clients about pets' overdue services, they might say,

This is Debbie calling for the doctors at Myers Veterinary Hospital. We are worried that Ollie is past due for his wellness exam, vaccinations and intestinal parasite screen and might now be unprotected. Will you please call us at 720-344-2347?

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. Timing can be critical for canine patients because the American Heartworm Society [www.heartwormsociety.org](http://www.heartwormsociety.org) recommends that dogs missing 45 days of preventatives be tested for heartworm disease before restarting monthly preventatives.

For pets overdue two or more months, your receptionists might call and say,

We are updating our files and noticed that Ollie hasn't been seen for his wellness exam and vaccinations. Has Ollie received his exam and vaccinations elsewhere?

This lets you either schedule an appointment or identify clients who have moved, no longer have the pet or are receiving veterinary care elsewhere. Keeping your database clean lets you maintain accurate patient records and avoid wasting money on mailing reminders to inactive clients.

If your receptionist speaks with the client, she would say,

This is Debbie calling for the doctors at Myers Veterinary Hospital. Ollie is overdue for his wellness exam, vaccinations and intestinal parasite screen, and we're worried about his health. When is a convenient time for you and Ollie to come in for an appointment this week? The doctor can see you at 6 pm on Thursday or at 9 am on Saturday. Which is more convenient for you?

Known as the **two-yes-options technique**, this phrasing significantly increases the chance you'll schedule the appointment because you direct the client to two possible appointment times. This phrase is stronger than *"Do you want to schedule an appointment?"* which is a yes-or-no answer.

Research from Veterinary Metrics in Atlanta shows 25 percent to 35 percent of pets that visited in the last 12 months don't have reminders for future services because 85 percent of those patients were seen for an illness or problem and didn't have reminders entered. When checking out clients for sick patient visits, receptionists should confirm when the doctor needs to see the pet next.

Add a checklist with common intervals for medical progress exams to your travel sheet such as:

When do we need to see this patient next?

- 3-5 days    7 days    10-14 days    Other \_\_\_\_\_    Regular reminder cycle

If the doctor did not check a box, the receptionist would ask the veterinarian or technician who saw the patient when the next follow up is needed while the client is still at the checkout counter. This safety net ensures the client schedules the next medical progress exam during checkout when compliance is highest.

“Wellness services, products and revenues apply to all pets the practice serves and therefore can be proactively generated. Wellness revenue performance is sustainable, controllable and predictable.”

— Hank Swartz, DVM, MBA of Veterinary Metrics Inc.

In endemic heartworm and flea regions, 38 percent of practice revenue comes from wellness services and products. In non-endemic areas such as the western region, 27 percent of revenue is from wellness. Using the same patient base, increasing wellness revenue by 6 percent translates into \$102,000 in incremental revenue, Dr. Swartz explains.

In addition to calling clients about pets with overdue reminders, you can capture missed opportunities with callbacks for rechecks and recommended services that clients have not yet accepted. Next, let's look at sample scripts your team can use when following up on patients' care.