



Driving Compliance at Every Visit

Use this checklist to guide your team's pet owner conversations, ensuring thorough communication, greater transparency, and enhanced compliance with recommended care.

- #1: Before the visit: Present financing options as wellness tools**
 - Start the conversation early, during the appointment confirmation.
 - Introduce pet insurance, and wellness plans as a means to facilitate ongoing care.
- #2: Set clear expectations**
 - Outline the visit's goals: "We'll address _____ [*specific concern*] and discuss _____ [*treatment options*]."
- #3: Educate clients about the "why" behind recommended care**
 - Explain the reasoning and benefits for each recommendation in clear and simple terms.
- #4: Discuss the pros, cons, and potential outcomes**
 - Promote informed decision-making by weighing the benefits and risks of every option.
- #5: Invite and ask questions**
 - Ask open-ended questions to uncover client concerns: "What questions do you have about this plan?"
 - Address questions with an empathetic and thorough response.
- #6: Review the estimate**
 - Present the estimate or plan, ensuring clarity on each item.
 - Confirm client understanding and agreement.
 - Answer any questions the client may have.
- #7: Share relevant resources**
 - Offer handouts, blog links, or QR codes for further information and learning.
 - Ensure resources are accessible and relevant to the client's needs.
- # 8: Discuss or demonstrate necessary care tasks**
 - Show clients how to administer medications, perform injections, or measure food portions.
 - Offer to practice with them to build confidence.
- #9: Automate future care needs**
 - Enroll clients in wellness plans or set up autoship for medications and supplies.
 - Activate relevant reminders for upcoming care needs.
- #10: Talk through the next steps**
 - Discuss future appointments, tests, or necessary treatments.
 - Provide a timeline for when these steps should be taken.
- #11: Explain the follow-up plan**
 - Set expectations for follow-up communication: "We'll check in via [method] on [date(s)]."
 - Assign a team member to monitor progress for chronic cases and address any issues.