



# TREATMENT PLAN DELIVERY

**T** Training exercises focused on delivering treatment plans can enhance team skills and build confidence, reducing reliance on doctors or senior team members for these tasks. Since doctors typically should not handle estimates with clients, equipping the team with these skills is crucial. Aim to elevate everyone to a consistent level of competency. With regular practice, confidence in presenting and explaining plans will naturally improve. Additionally, emphasize that individual skills do not determine a team member's value; instead, the collective strength of the team is what matters. This perspective fosters mutual support, collaboration, and growth within the team.



The key to making these conversations easier is remembering that the team and the client are on the same side; both want to do what's best for the pet. Clients expect to pay for services (in most cases!), and it is the team's job to help the client understand the treatment plan and the value of the care the entire team offers.

## 1 Understand the procedures/treatments being offered/performed.

**If the treatment plan includes a service that is difficult to explain, ask team members before the plan is presented to the client.** Team members don't have to be experts, but if the client asks questions about the procedure, the team member needs to be able to deliver the recommendation confidently and proudly.

## 2 Focus on the value offered by the practice.

**Describe the service that will be provided and explain how Fluffy will benefit, and why the doctor is recommending that service.** If the first item on the treatment plan is a complete blood count and chemistry panel, don't say, "This blood work will cost \$112." Instead, point to the item on the plan and say, "First, we need to analyze Fluffy's blood to diagnose her condition and make sure we select the right anesthesia for surgery." The cost does not have to be stated; the client can see the price on the plan.

## 3 Offer details.

**A thorough, easy-to-digest explanation helps clients understand the true scope of the recommended procedure.** Don't walk into the exam room and say, "This surgery will cost about \$2,000. Is that OK with you?" Clients will think the procedure is very expensive, and they won't understand all the elements of the care being offered. Instead, if the treatment plan lists a hospitalization charge of \$700, explain that this includes IV fluids, nursing care, and a daily doctor's exam. Jotting key points down on the plan will help clients remember.



## 4 Encourage the client to ask questions.

**Complex medical procedures can intimidate and overwhelm clients, and they may hesitate to ask questions if they don't understand.** Make it comfortable for them and ask, *"What questions do you have for me about Fluffy's plan?"* Asking 'What questions do you have' is an open-ended question; clients will respond with more than a yes or no answer—and likely ask a question. Closed-ended questions such as *"Do you have any questions for me?"* will yield a "no" as clients are too embarrassed to ask to clarify the recommendations again. Clients who understand the recommendations fully are more likely to make the right decisions for their pets and will be less disgruntled when they leave the practice.

## 5 Don't get defensive.

**Clients may make comments about the cost.**

Sometimes, this is a time-filling comment while they consider what has been presented; other times, means they don't fully understand the value of the care being offered.

If the client says, *"Gosh, that seems like a lot of money,"* don't immediately assume they are upset and won't agree to the treatment plan. Most of the time, the client's comment means he or she needs more information. An appropriate response would be, *"Yes, it is. Fluffy is a sick kitty, and we want to ensure we figure out what's wrong with her and offer her the best care possible. Which item concerns you the most?"* Again, this open-ended question solicits a discussion, resulting in the opportunity to provide more value for the client.



## 6 Be empathetic.

**Show concern about the pet's health and approach clients with an empathetic, friendly, and relaxed attitude.** Give them time to think and ask questions. If they say they need to take the plan home and talk with their spouse, give them your name and tell them you would be happy to answer any additional questions that may arise.

## 7 Don't use guilt trips.

**If clients indicate that they can't or won't pay for the treatment recommended, that's OK.** Offer to talk to the doctor about other treatment options that will cost less and give them the doctor's alternatives.

## 8 Don't break treatment plans down into "good," "better," and "best" recommendations.

**Always start by including all recommendations the doctor(s) believe will result in the best prognosis/care.** Breaking treatment plans into these categories can lead clients to believe that all the recommendations are equal. After discussing a full treatment plan, if there are financial constraints, the plan can be tailored to fit their budget. It's always important that they understand this will be achieved by removing different diagnostic and potentially even treatment options. This doesn't always result in the best prognosis, but the team must respect the financial budgets of clients while providing the best care within those boundaries.

## 9 Always be familiar with the finance options the practice has available.

**Every team member should be fluent with CareCredit, ScratchPay, or other financial alternatives** available for clients who may need assistance. The more comfortable the team is presenting financial options, the more likely clients will accept the alternative payment option and the full care recommended by the team.

# CLIENT COMMUNICATION

## TRAINING ACTIVITIES

1. A new client has called in. They found an adult dog, went through the motions of finding the owner, and have been cleared by Animal Control to keep the dog. They want to establish care, get this dog vaccinated, and do “whatever else is recommended.” The dog is male, intact, and has fleas. He is at least a year old.



**Role-play the discussion** (you would have with the client) with another team member; you are the team member who answered the call; your team member is the client.



**Build empathy and compassion into your questions** that will help you determine what the next steps for this client would be.



**List out the steps needed** to move this case forward.



**Develop a treatment plan** for this client.



**Role play delivering the treatment plan** to the client.



**Once you have completed role-playing, self-reflect on the scenario.** What would you have done better? Now, ask your team members what they recommend to improve the scenario and make it an exceptional client experience.

2. An active client is here for an annual visit. During the visit, we updated their dog’s DHLPP, RV3, and full bloodwork. Their Bordetella vaccine and annual fecal test are due in two weeks, but they elected to wait and not have them updated during this visit. The doctor noted that their dog has stage 2 dental disease and recommends a dental cleaning. The client requested an estimate and mentioned they would like to schedule the procedure in about 4 weeks.



**Role-play the discussion** (you would have with the client) with another team member; you are the team member who answered the call; your team member is the client.



**List out the steps needed** to move this case forward.



**Develop a treatment plan** for this client.



**Role play delivering the treatment plan to the client**, while also addressing outstanding items due and scheduling.



**Once you have completed role-playing, self-reflect on the scenario.** What would you have done better? Now, ask your team members what they recommend to improve the scenario and make it an exceptional client experience.

3. You are finishing up with a first kitten visit. The kitten is 6 weeks old today and received everything the hospital recommends for a 6-week-old visit. The owner would like to schedule the next visit and get an estimate so they know what to prepare for.



**Role-play the discussion** with this client with another team member; you are the team member; they are the client.



**Develop a treatment plan** for this client.



**Role play delivering the treatment plan to the client**, while also addressing scheduling.



**Once you have completed role-playing, self-reflect on the scenario.** What would you have done better? Now, ask your team members what they recommend to improve the scenario and make it an exceptional client experience.

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4. A new client stopped into the clinic with their 10-month-old dog's previous veterinary records. She would like to have her spayed with us. After reviewing the records, you know that her dog is up to date on DHLPP, Bordetella, and Rabies.



**Role-play the discussion** with this client with another team member; you are the team member; they are the client.



**Develop a treatment plan** for this client.



**Role play delivering the treatment plan to the client**, while also addressing scheduling.



**Once you have completed role-playing, self-reflect on the scenario.** What would you have done better? Now, ask your team members what they recommend to improve the scenario and make it an exceptional client experience.

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5. An owner calls in to see if they can bring their cat in. The cat has been limping since last night but otherwise doing well - eating and drinking normally, no vomiting or diarrhea.



**Role-play the discussion** with this client with another team member; you are the team member; they are the client.



**Build empathy and compassion into your questions** that will help you determine what the next steps for this client would be.



**Develop a treatment plan** for this client.



**Role play delivering the treatment plan to the client**, while also addressing scheduling.



**Once you have completed role-playing, self-reflect on the scenario.** What would you have done better? Now, ask your team members what they recommend to improve the scenario and make it an exceptional client experience.

6. An owner calls at 10am saying they have a new puppy they brought home 7 days ago. They state the puppy is acting very sleepy and having bloody diarrhea.



**Role-play the discussion** with this client with another team member; you are the team member; they are the client.



**Build empathy and compassion** into your questions that will help you determine what the next steps for this client would be.



**Develop a treatment plan** for this client.



**Role play delivering the treatment plan** to the client, while also addressing scheduling.



**Once you have completed role-playing, self-reflect on the scenario.** What would you have done better? Now, ask your team members what they recommend to improve the scenario and make it an exceptional client experience.



## Practice Reflection:

What, if any, SOPs need to be built to help the team make the right decisions to handle each of these scenarios?



Which team members need more training on the “why” behind the recommendations?

When will you be able to do this and role play further with those team members to build confidence?



What, if any, bundle codes need to be built to help team members not miss charges when developing a treatment plan?

7. You speak to a new client on the phone. They have a rabbit that has not eaten in 2 days, and they are looking for a veterinarian that can see it.



**Role-play the discussion** with this client with another team member; you are the team member; they are the client.



**Build empathy and compassion into your questions** that will help you determine what the next steps for this client would be.



**Develop a treatment plan** for this client.



**Role play delivering the treatment plan** to the client, while also addressing scheduling.



**Once you have completed role-playing, self-reflect on the scenario.** What would you have done better? Now, ask your team members what they recommend to improve the scenario and make it an exceptional client experience.