

DRIVE VISITS WITH ALLYDVM

- USING THE RETENTION CALENDAR

WHAT IS THE ALLYDVM THE RETENTION CALENDAR?

06.23.22

The Retention Calendar is your ally in **retaining current clients** and **generating additional appointments** for your hospital. It also helps your clinic **improve the quality of client data** by **collecting inaccurate or missing information** (emails, cell phone numbers, and mailing addresses).

By resolving the paw print alert, **Moore Lane Veterinary Hospital** generated an additional **56 appointments** and **\$16,407** over a 3-month period.

During the same period, **Eastside Pet Clinic** resolved **36% of alerts**, collecting over 2,000 pieces of missing contact information and updated records for pets with missing reminders.

Alert Resolution Goal: 10%!

Retention Calendar Manage and track your client retention activities

Date Picker and Statistics

February 2021

Yesterday	This Week	This Month
	5%	2/44
	14%	10/72
	3%	1/33
	0%	0/69
	0%	0/5
	6%	13/223

Tuesday, February 9, 2021

TIME	CLIENT	PATIENT	CONFIRMED	ALERTS	RESOURCE	TYPES
8:00 AM	Burnell, Amy (20150)	Lexi				Dental
8:00 AM	HEPPNER, MANDY (40577)	Alfred	30 Jan 13:38			Vaccinations
8:00 AM	Soares, Annalise (53012)	Uni	07 Feb 16:34			Examination

WHAT ARE RETENTION CALENDAR ALERTS?

= Paw print alert for additional pet(s) in the same household that is overdue or coming due (within 30 days) reminders and do not have an appointment scheduled in the next 7 weeks)

= Missing reminder alerts for any active pet with less than 2 medical reminders in the PMS

= Alert for missing or invalid email, mobile phone or mailing address in the PMS

If Covetrus is your online pharmacy vendor, remember to use *declined_clientname@donotmail.com* if a client declines to provide an email address. You can also check "*Missing or Invalid Email alerts disabled*" in AllyDVM in the client details section.

RETENTION CALENDAR BEST PRACTICES

5 EASY TIPS TO RETAIN CURRENT CLIENTS AND GENERATE ADDITIONAL REVENUE:

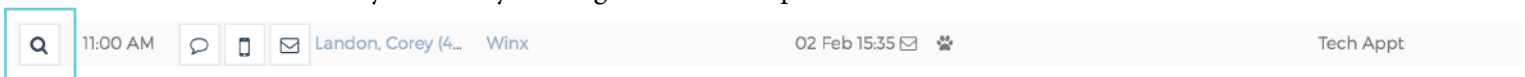
1) Make it simple for your CSRs to resolve alerts daily

Recommended Practices: Work directly from the Retention Calendar

- Each morning, open the Retention Calendar on a secondary monitor (if available)
*NOTE: Please reach out to your DL or MRO if you require a secondary monitor
- CSRs should review alerts as clients arrive for their appointments or check-in via text/phone call
- **Check-in is a great time to ask clients for missing contact information so they can receive important updates from your hospital
Remember! All client information should be entered directly into the PMS

2) Use the Magnifying Glass to view ALL alerts for a client

- This will save you time by viewing all alerts and specific details at once



3) All alerts are important; however, paw print alerts retain clients AND generate additional revenue

HOW TO RESOLVE PAW PRINT ALERTS

- ✓ Book Appointment for Pet(s) in PIMs or OBT
- ✓ Remove reminder for Pet(s) in PIMs (stop code)
- ✓ Suspend reminder for Pet(s) in PIMs
- ✓ Update reminder so pet(s) no longer past due or due in the next 30 days in PIMS
- ✗ Mark Pet(s) or Client as inactive in PIMs
- ✗ Discuss past due pet, client declines
- ✗ Select "All Retention Calendar Alerts Disabled" box in AllyDVM
- ✗ Select "All Alerts Disabled" box in AllyDVM

PAW PRINT KEY

- ✓ Resolved; added to numerator ("DONE")
- ✗ Not Resolved; remains in denominator ("TO DO")
- ✗ Invalidated; removes from Retention Calendar, deducted from denominator

$$\text{Paw Print Alerts \%} = \frac{\text{Paw Print Alerts DONE}}{\text{Paw Print Alerts TO DO}}$$

- The easiest paw print alerts to resolve and convert into appointments are those that contain vaccines
- Remember - don't get discouraged by clients not booking. Not every paw print will result in an appointment. The goal is to convert 10% into appointments

4) Lean on your other team members to resolve paw print alerts

- Some hospitals print the Retention Calendar for upcoming patients in the morning and make note of which pets are overdue
- Doctors and technicians can use this list when talking to the clients

5) Training & Assistance available!

- We offer Retention Calendar Training every week. We have the WEDNESDAY session or THURSDAY session. It's not just for Hospital Managers; invite your team
- Don't get discouraged! It takes time to achieve 10% alert resolution
- Feeling stuck? Email marketing@nva.com to reach one of our AllyDVM experts

MONITOR RETENTION CALENDAR PROGRESS

USE ALLYDVM REPORTS TO KEEP TRACK OF YOUR STATISTICS

As a hospital manager, you should review the AllyDVM Retention Calendar Stats report weekly to determine how many alerts are being addressed by your CSRs

To run the Retention Calendar Stats report, follow the below steps:

- Reports > Core Reports > Retention Calendar Stats > Select Last 7 Days
- As incentive for staff, highlight the revenue earned from the number of alerts satisfied

ALLYDVM RETENTION CALENDAR BENCHMARKS:

AllyDVM users should resolve 10% of all alerts.

Stevens Point Animal Hospital

Quick Charts: Quick Comparisons:

Last 7 Days Last 30 Days Last Year Last 7 Days vs Previous Period Last 30 Days vs Previous Period This Year vs Last Year

From: 01/26/2021 To: 02/01/2021

Compare to another period

Run Report

ALERT TYPE	TO DO	DONE	PERCENTAGE DONE	MISSED OPPORTUNITIES COST
Pets Past Due	17	2	12%	\$2,308
Pets Missing Reminders	22	9	41%	\$2,987
Missing or Invalid Email	16	3	19%	
Missing Cell Phone Number	7	3	43%	
Invalid Mailing Address	0	0	0%	

= PETS PAST DUE)

REMINDER!

By not addressing the AllyDVM paw print (pets past due) and pets missing reminders alerts daily, your hospital will leave revenue on the table! This is the low hanging fruit opportunity for your practice!

CONTACT INFORMATION: TALKING POINTS

Help them understand why you want the information:

“Our clinic sends vaccination reminders and appointment confirmations via email and text. Can I please verify your cell phone number and your email address?”

“By providing us with an email address, our clinic can notify you about your pet’s upcoming appointment, vaccination reminders, etc. Could you please provide us with your email address?”

Keep the tone positive vs. negative:

“What is the best number to reach you?” vs. “We don’t have your cell number...”

Information Verification:

“To verify your contact information for future reminders about your pet, is (email, cell number, home address) correct?”

“I’d like to verify the information we have is correct. Is (number on file) the best number to reach you via text?”

TALKING POINTS FOR OTHER PETS OVERDUE

“It looks like (pets name) is also due for (services), did you want to book an appointment?”

“How is (overdue pets name) doing? It looks like (pets name) is due for services. Would you like me to book that appointment for you?”