

# Pet Health Insurance: Sample Team Member Task List

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*This task list provides examples of how specific team members could address pet insurance at your practice. This list could be repurposed for other topics covered in the webinar, such as third party financing and wellness plans.*

## Leadership – Practice Owner & Manager

- ✓ Identify one or two pet insurance companies you feel comfortable recommending.
- ✓ Put a pet insurance discussion on the agenda for the next team meeting.
- ✓ Share key messages and supporting facts with your team. For instance:
  - Explain how pet insurance helps pet owners manage the costs of care
  - Describe how it can be beneficial to pets as well as your practice
  - Introduce the 1 or 2 companies you chose to recommend and why
  - Fact #1: Clients with ASPCA Pet Health Insurance spend about 3.5 times as much on veterinary care than pet owners in general.\*
  - Fact #2: Insured clients have 41% higher stop-treatment levels.\*\*
  - Fact #3: 74% of ASPCA Pet Health Insurance customers visit their veterinarian more than once a year.+

## Practice Manager

- ✓ Provide insights or stories to help team members understand how many pet owners find out about pet insurance the “hard way.” For instance, you can use this story from the El Cid Animal Clinic in Florida:

*When two dogs were brought in with the same symptoms, their pet parents had different experiences. One had pet insurance and easily said yes to treatments without looking over the costs. The other pet parent did not have insurance and could not afford the recommended services.*

*The medical team devised an alternate plan but had to omit diagnostic tests, which left unanswered questions and imposed constraints on treatment. Sadly, many pet parents don’t realize the importance of pet insurance until an emergency happens.*

- ✓ Share stories of how pet insurance helped clients in your practice take care of their pets. You can also post these stories on social media with the client’s permission.
- ✓ Order brochures to give clients about pet insurance, and post insurance links (or company provided banners) to make it easy for your clients to get an insurance quote directly from your website.
- ✓ Set up a procedure to note whether or not clients have pet insurance and what company they are using in patient records.



\*2016 ASPCA Pet Health Insurance claims data and Bureau of Labor Statistics (Ted: The Economic Daily, April 4, 2017). \*\* NCVEI, January 2009. +Based on ASPCA Pet Health Insurance survey, August 2014. The ASPCA® is not an insurer and is not engaged in the business of insurance. Products are underwritten by the United States Fire Insurance Company, produced and administered by C&F Insurance Agency, Inc. (NPN # 3974227), a Crum & Forster company. Through a licensing agreement, the ASPCA receives a royalty fee that is in exchange for use of the ASPCA’s marks and is not a charitable contribution. C&F and Crum & Forster are registered trademarks of United States Fire Insurance Company.

## Practice Manager Continued

- ✓ Schedule training on pet insurance so team members can feel confident talking to clients about it. You can use this link [[www.aspcapetinsurance.com/veterinarians/request-a-lunch-and-learn/](http://www.aspcapetinsurance.com/veterinarians/request-a-lunch-and-learn/)] or contact the pet insurance company and ask about free educational resources.
- ✓ Assign responsibility for client conversations about pet insurance to appropriate team members. For example, have receptionists ask clients if they have pet insurance when they check in.
- ✓ Gather feedback on how conversations with clients about pet insurance are going. Share success stories with the entire team and troubleshoot if needed.
- ✓ Collect stories about pets that were helped at your practice because they had insurance. Share them at team meetings to help keep interest high and consider posting them on social media with the client's permission.

## Veterinarians

- ✓ Suggest pet insurance to all new clients especially those with newly adopted pets, puppies, or kittens. Offer them a brochure or handout to stimulate their interest.
- ✓ Recommend wellness coverage to clients who seem hesitant to take advantage of those services for their pets.

## Technicians/Assistants

- ✓ Suggest pet insurance to all new clients especially those with newly adopted pets, puppies, or kittens. Offer them a brochure or handout to stimulate their interest.
- ✓ Refer clients to pet insurance information in your new puppy/kitten or welcome kits.
- ✓ Be prepared to answer client questions about pet insurance by reading through the brochures and setting up a staff training session with your preferred pet insurance providers.

## Receptionist

- ✓ Always ask clients if they have pet insurance when they check in.
- ✓ Give clients brochures or handouts and let them know they can ask questions or go to the practice's website for more information.
- ✓ Provide them with a business card with the link to the practice website—or offer to e-mail or text them the link.



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