

Introducing your clients to **Easy Care plans**

A guide for practice teams

Rolling out a preventative health plan isn't just about having the posters up and the pricing sorted—it's about knowing how to talk about it. And more importantly, knowing when to talk about it.

In busy consults and day-to-day conversations, it can feel awkward to bring up something that sounds like a "plan" or a "product." But when done naturally, with confidence and good timing, Easy Care becomes a genuinely helpful suggestion—not a sales pitch.

This worksheet walks you through exactly how to do that: spotting the right moments, keeping it conversational, and making sure every team member knows the part they play. No scripts. No pressure. Just confident, everyday communication that makes life easier for your clients, your patients, and your team.

1) Start with a confident team

Before any client conversation can happen, your team needs to feel confident, comfortable, and clear on why Easy Care matters.

That means more than knowing what's included—it means understanding the bigger picture: how preventative plans improve pet wellbeing, reduce unexpected costs for owners, and make your job easier in the long run.



Action step: Hold a short team session (15–20 mins). Walk through a real-life case where preventative care helped a patient. Use the testimonial story from your toolkit to open the conversation on a relatable note.

2) Spot the right moment

Not every consult is the right time—but many are. You don't need to "sell" the plan. Just listen for clues. Preventative plans are most naturally introduced when a client is already thinking about:

- The cost of treatment or vaccinations
- Booking their next visit (e.g. for vaccines, parasite treatment)
- Worrying about future illness or repeat issues
- Asking questions about what they should be doing

In these moments, Easy Care becomes a helpful answer—not a pitch.

💡 What to listen for:

"How much will it all cost?"

"When do I need to come back?"

"I want to do the right thing, but it's hard to keep track."



Action step: Encourage your team to jot down common client questions this week. You'll likely find 4–5 that naturally invite a plan mention.

3) Frame it as support, not sales

Clients don't want to be sold to—but they do appreciate being guided. That means no hard pitch, no jargon, and no pressure.

Instead, focus on making the plan feel like a helpful tool:

"A lot of our clients now use Easy Care—it spreads out the cost and includes everything they need."

"Actually, we've got a plan that covers that, and more—it's called Easy Care, and it might be worth a look."

Keep it casual, not clinical. You're not asking them to buy something—they can do that anytime. You're just planting the seed.



Action step: Practice one sentence that feels natural to you. Write it down and keep it in your consult notes or cheat sheet.

4) Use follow-ups wisely

Even if a client doesn't sign up in the room, the idea is now in their head. That's a win.

Follow up with:

- A quick note on their discharge sheet
- A mention in their next email reminder
- A follow-up call about vaccines or repeat meds: "Just a reminder – and I also meant to say, our Easy Care plan includes all of this."

The more consistently they hear about it, the more normal it feels—and the more likely they are to act.



Action step: Add "Mention Easy Care?" as a tick-box in your consult follow-up notes.

5) Know your role

Every team member plays a part. You don't all need to explain the whole plan—just your piece.

- Receptionists might mention: "Are you on our plan? It saves a lot over the year."
- Vets might highlight: "You'd be covered for that under Easy Care."
- Support staff might help track interest or hand out leaflets.

It's not about having the perfect script—it's about creating a consistent, joined-up message across the practice.



Action step: Choose one or two team champions who enjoy talking to clients. Let them lead by example.

Final thought – just start talking about it

You don't need a perfect pitch. You just need to start the conversation.

Most clients won't sign up the first time—but nearly all will appreciate the recommendation. The more it's talked about, the more it becomes part of everyday care.