

Easy Care team readiness checklist

A checklist for team managers

Introducing Easy Care to your team

A quick checklist to go over the accompanying team worksheet and ensure that everyone feels confident and ready to chat about Easy Care with clients.

1. Get everyone on board

- ☐ Have a short team chat about what Easy Care includes and why it helps
- ☐ Make sure everyone feels clear and comfortable explaining it

2. Spot the right moments

- ☐ Talk about when it feels natural to mention Easy Care – like during cost chats or vaccine visits
- ☐ Share a few real client questions that open the door to the conversation

3. Keep it natural

- ☐ Everyone has a simple, easy way to bring up Easy Care that feels natural and easy to them
- ☐ Focus on helping, not selling

4. Follow up gently

- ☐ Mention Easy Care in reminders, follow-up notes or quick reception chats
- ☐ Keep the tone friendly and helpful

5. Work as a team

- ☐ Ensure everyone knows their role
- ☐ Pick one or two team champions to keep Easy Care front of mind