SOLUTIONS VET

Academy

Module 23 – Senior Wellness Campaign: Reminder Management and Performance Monitoring

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1. **Foreward**

The graphic display and some features in our training modules may differ from those in your software version. Solutions Vet Academy routinely updates its modules. The software, however, is continuously being upgraded.

2. **Preparing your campaign**

Throughout this document, we will be simulating preparation for a promotional campaign known as the **Senior Wellness Campaign** intended for owners of older or aging pets.

2.1 Creating a new reminder type: Senior

To prepare a promotional campaign targeting your clientele, we suggest that you create a new reminder type to facilitate the creation and processing of your reminder batches.
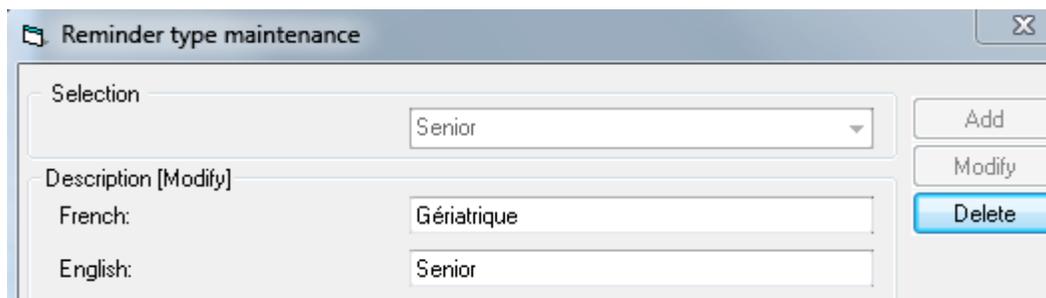
Go to "Configuration" … "Reminder types" and then "Reminder type."
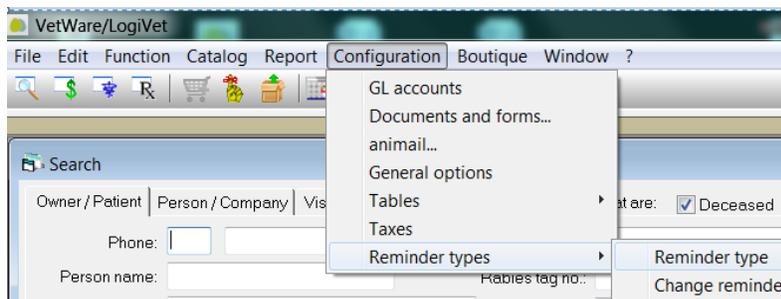
The "Reminder type maintenance" window will open.

Click on the "Add" button.

Under "Description," enter your reminder type name using, for example, "Gériatrique" in the box for the French and "Senior" in the box for the English.

Continue to define this new reminder type by completing the following fields:

Scheduled number of days (optional field): Indicate the default number of days for when the reminder should go out. This configuration takes effect when reminders of this type are added manually.

Client confirmation required: Check this field if you wish to track the progress of this reminder type. Click on "Yes" if you want to make multiple attempts to reach clients. Suggested for the campaign.

Internal use only: Check this box if the reminder type you have just created will be used for internal purposes only. Not necessary for the campaign.

Default *animail* template (optional field): Select the default *animail* template name that you will use for emails in connection with this reminder type. You can always choose a template when you are preparing to send your email reminders.

Default document to print (optional field): Select the document template name that you will use for postal mailings in connection with this reminder type. You can always choose a document when you are preparing to mail your reminders.

The client communication preference will be generated (…): When you create a new reminder type, you can automatically assign client communication preferences to it. By selecting an existing reminder type, for example, "Parasiticide," the communication preference for all your clients will be generated according to this preference. You will thus avoid sending reminders to clients who have indicated that they do not want them.

2.2 Creating campaign-related product categories and services

Proper categorization of each product and service you sell is important to measure your campaign's performance. Sales summaries and statistical reports are good tools for interpreting and analyzing results. Having specific categories for products and services will enable you to track your sales of them.

To create new categories, follow the steps below.

Go to "Catalog" and select "Product revenue categories" or "Service revenue categories."
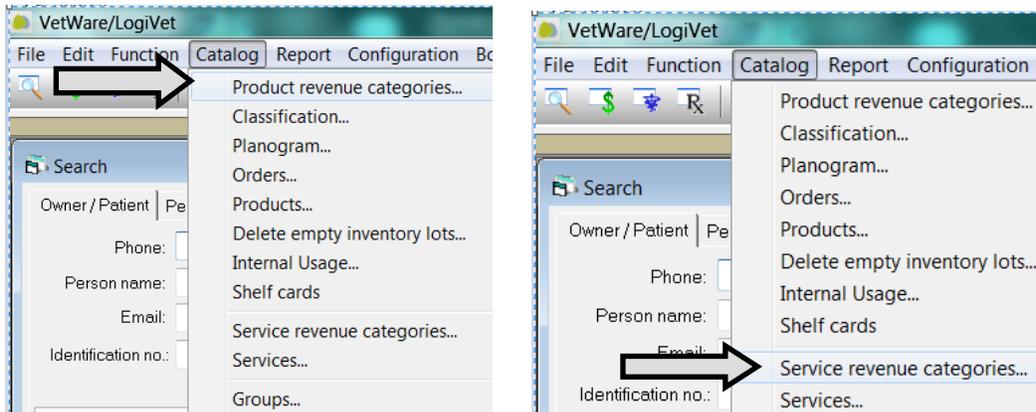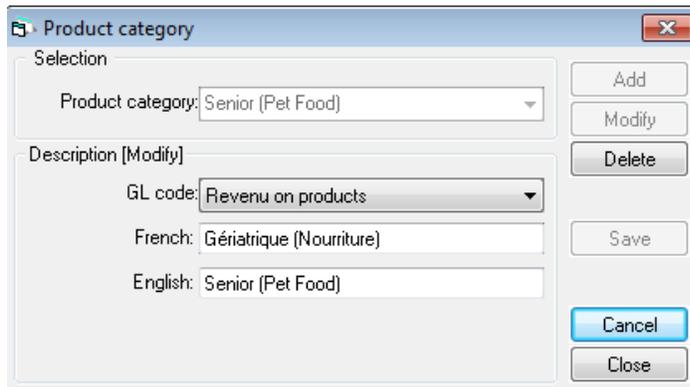

Click on "Add."

Enter information in the French and English description box, making sure you select the appropriate general ledger code ("GL Code"), and then click "Save."
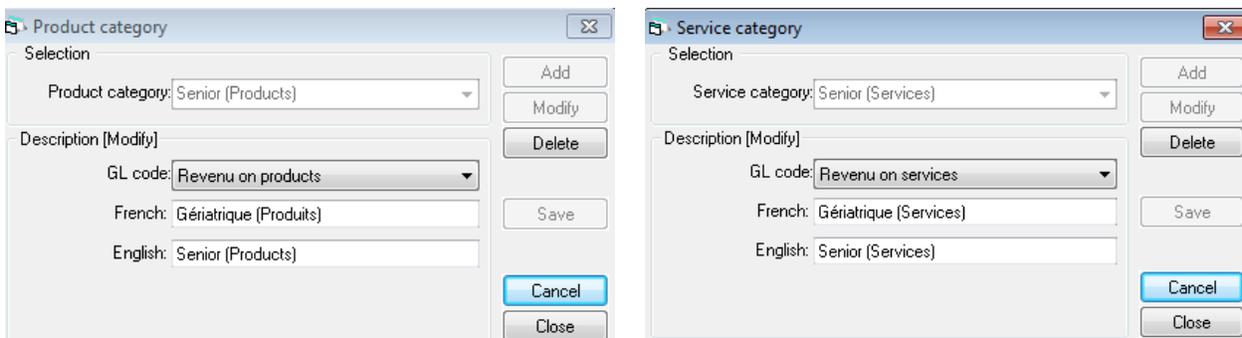
Product: In addition to the product category "Senior (Products)," you can also create one for "Senior (Pet Food)" for quick and accurate sales statistics for your Senior Wellness Campaign.

Refer to sections 2 and 3 in Module 3 on Catalog, for more details about the management of product and service categories.

2.3 Changes to campaign-related products and services

Match each of the products and services to the category associated with your promotional campaign.

Go to "Catalog"… "Products." Locate the product in question and select the desired "Revenue category."

Go to "Catalog"… "Services." Locate the service in question and select the desired "Category."
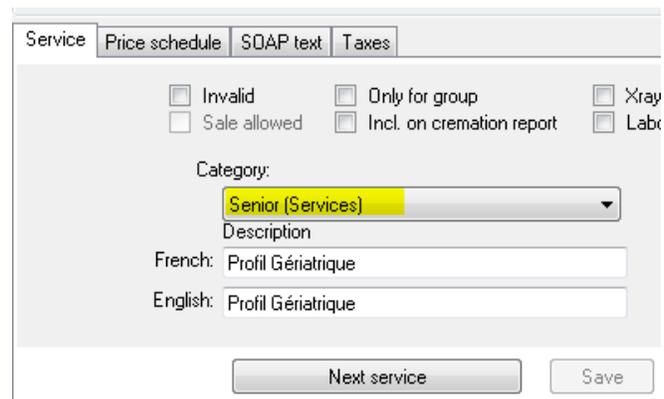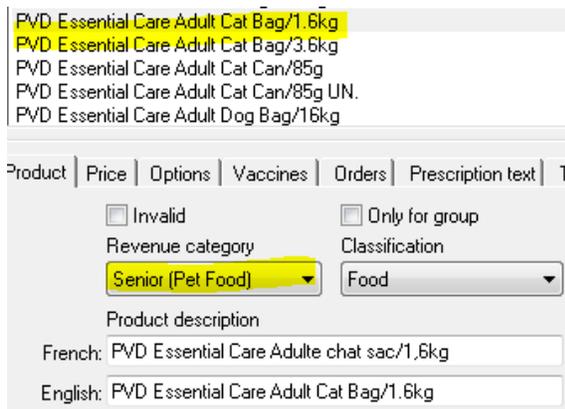
Making this category change allows you to easily track your sales performance from one year to the next and thus analyze the campaign's impact on your revenues.

When you change the revenue category for existing products and services included in your catalog, the sales history of the applicable items will be as of the date of the changes made in the relevant category.

3. Creating and managing reminder batches

There are two methods for managing reminder batches. The first method (scenario 1) involves displaying existing reminder batches, that is to say reminders that are automatically entered in your client records. These reminders are added when you sell specific services or when they have been added manually to client records. Ideally, this method should be prepared in advance. For example, you can add a senior "blood profile analysis" if you wish to send a reminder to clients who obtained this service. As yours sales for this service progress, the reminder batch will be created.

The second method (scenario 2) entails creating personalized reminder batches according to specific features and previous client purchases. Products or services sold to clients can be used to create customized reminder batches or you can select criteria such as species, age and sex.

3.1 Viewing a reminder batch already on file: Scenario 1

To display reminders already in your system:

Go to "Function" … "Reminder batches."
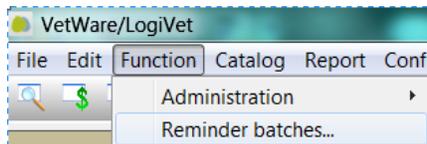
The "Reminder batch/Mail merge" window will open to display the "Management/printing of batches" default tab, with the "not sent" box checked off.
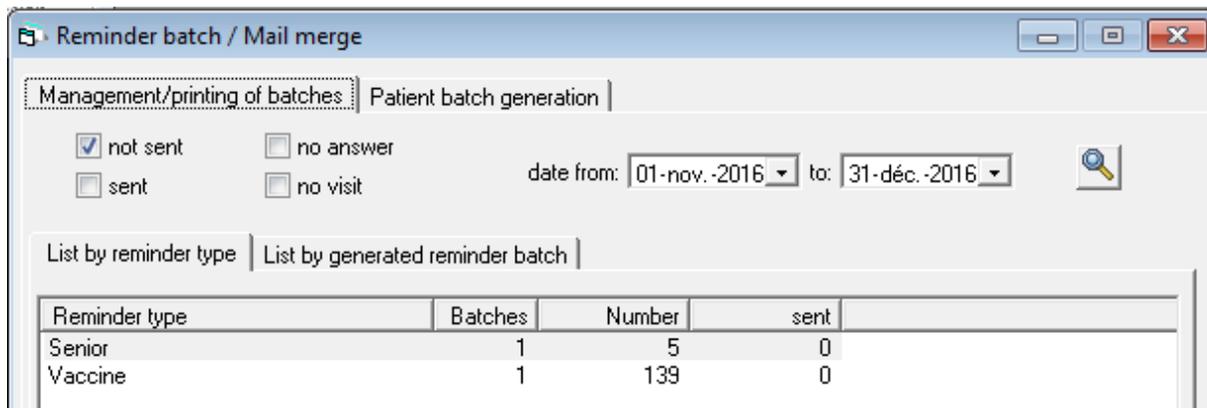
Select a date range by entering the information in the "date from:" and "to" boxes as shown in the above example for the period from November 1, 2016, to December 31, 2016. Click on the magnifying glass to launch the search.

Batches will be displayed by reminder type. In the example, we have two reminder types for this date range, namely "Senior" and "Vaccine."

3.2 Creating personalized reminder batches: Scenario 2

Reminder batches can be created based on criteria such as species, age and sex, or according to products or services sold to clients. This extraction method will enable you to reach a specifically targeted clientele within the context of the Senior Wellness Campaign.

Go to "Functions"… "Reminder batches" and then click on the "Patient batch generation" tab.

Under "Inclusions/Exclusions," you can select species and breeds as well as products and services. On the bottom, you will see a date selection prompt, i.e., "Sold between:" plus "and," to do a search of your sales during the period specified (default date range is set to display data for the two previous years). The "Include," "Exclude" and "Remove" buttons are used to confirm your search criteria in the lower box.

Other criteria are listed on the right side of the window: "Last visit," "Vaccination," "Age," "Mixed breed," "Sterile," "Sex," and "Deceased." In this way, you could create a reminder batch for all dogs and cats older than 7 years who have not been seen at the clinic for 6 months.
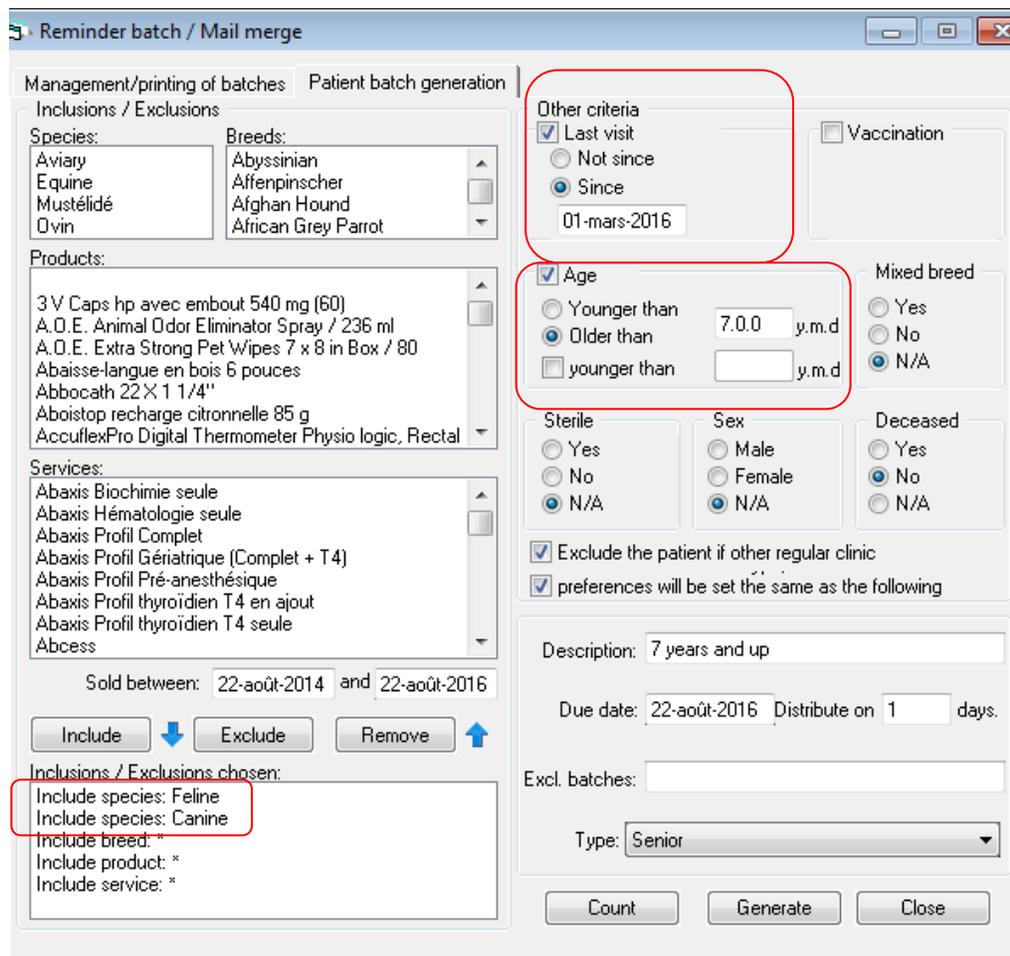
Let's do a complete run-through to reach all dog owners who purchased specific products between August 1, 2015 and August 31, 2016:

Go to "Functions"… "Reminder batches" and then click on the "Patient batch generation" tab.

Under "Species," select "Canine."

Click on the "Include" button and the species will appear in the box that says "Inclusions/Exclusions chosen."

In the "Products" section, locate the product in question and select it.

Click on the "Include" button and the product will appear in the box that says "Inclusions/Exclusions chosen."

Repeat this step for all products concerned.

Select a date range at the "Sold between" plus "and" prompt.

Please note that if you wish to select products and services, the software will select only clients who purchased both and not one or the other. However, you can select multiple products and the system will select clients who purchased at least one of these products.

It is important that when you sell a geriatric product, for example, that you select the animal for which the product is intended. If you do not select the animal at the time of the sale while using the "Client Sale…" function, the next batch of "geriatric" reminders will not show the sale because it was not tied to an animal.

On the bottom right, enter a description that will characterize the batch.

Under "Due date," the current date will be displayed as the default. Select another date if you want the reminders to go back further.

"Distribute on X days": 1 is the default value. If you enter September 1, 2016, for the date and 2 in the box for days, your batch will include reminders with a "Due date" of September 1 and 2, 2016.
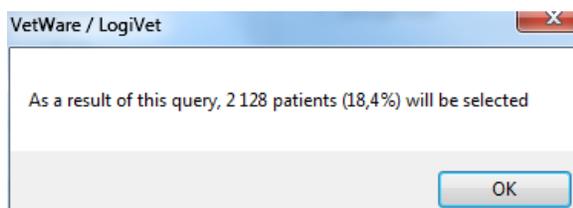

Type: Select "Senior" as the reminder type.

To do a check of the number of reminders before generating the batch, click on the "Count" button. This will display the number and percentage of pets selected.
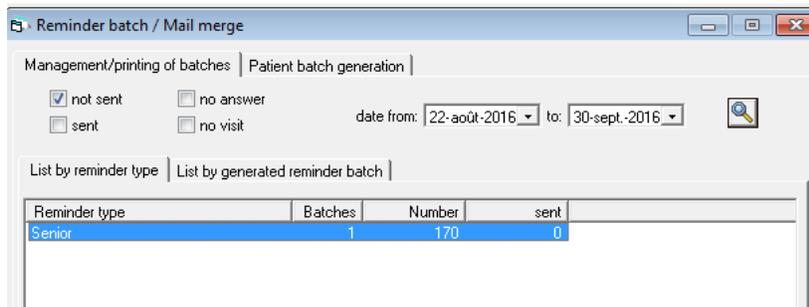
Click "OK" to close this window.

Click on "Generate."

At the bottom left, you will see a message indicating that the generation has been completed. The batch number and name will also appear.

Click on the "Management/printing of batches" tab and under "Reminder type" in the centre, you will see your batch, i.e., Senior, ready to be used.


"Excl. batches": In this box, you can enter, if necessary, the batch number or numbers to be excluded prior to generating a new one. For example, to be certain not to contact owners of older dogs seen recently, you can generate a patient batch specifically matching this criterion, batch number 16 in this particular instance, and ensure it is excluded before creating the master batch, i.e., dogs for which a reminder needs to be issued as part of the Senior Wellness Campaign.
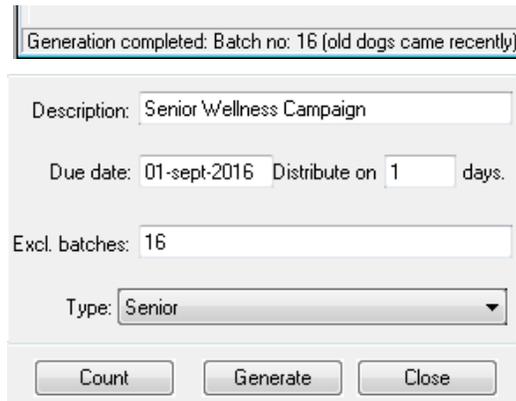
3.3 Viewing, deleting and printing a reminder list

When you double-click on a reminder batch or click on the "View" button, you can see the list of clients selected.

Hitting the "Delete" button will erase the selected batch as well as all batch reminders that were entered in the client records.
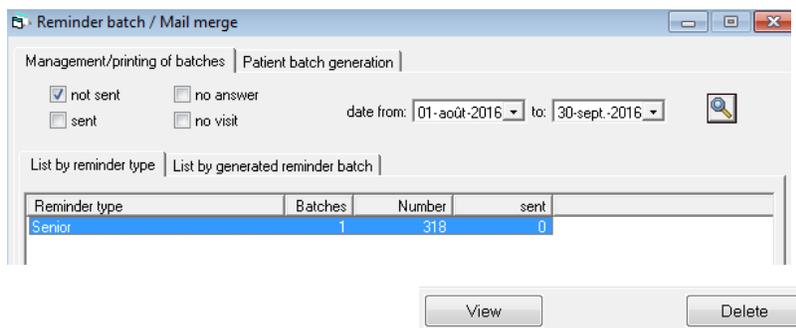
It is possible to delete reminders once you are in the reminder list, but only one at a time. Select the reminder you want to remove and hit the "Delete" button. The reminder will disappear from your current list and from the client record.

You can print a reminder list from this location. Click on the "Print" button to obtain a summary list of pet owners' telephone numbers. This list will include both French- and English-speaking clients.

If you wish to do telephone reminders, it is preferable to use the "To do list" discussed in section 4.5. of this document.

4. Choice of media for reaching target clientele

Your software offers various methods for reaching clients. Some people prefer to contact clients by telephone while others will send reminder cards or personalized letters in the mail. Veterinary clinics that have compiled a directory of email addresses may, with the client's consent, send reminders or invites electronically using the various *animail* templates.
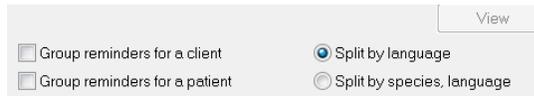
To reach and engage the greatest number of pet owners, a combination of methods is recommended. For example:

- Attempt n° 1: postcards; attempt n° 2: phone calls.
- Attempt n° 1: email reminders; attempt n° 2: phone calls.
- Attempt n° 1: emails; attempt n° 2: postcards; attempt n° 3: phone calls.

Your software allows you to indicate each client's preferred method for being contacted with different reminder types. Please refer to Module 17 on communication preferences for more information on this topic.

4.1. Grouping and splitting reminders

Before printing, emailing or exporting reminder batches into a file format, you can bundle (group) reminders and split them using any of the following methods:

Group reminders for a client: Check this box if you wish to bundle reminders for clients who have more than one pet; a single email will be sent and only one letter or postcard will be printed.

Group reminders for a patient: Check this box if you wish to bundle reminders for patients where there are multiple same-type reminders; this option ensures that a single reminder is printed per patient.

Split by language (default option): Reminders are split into two (2) groups according to language, namely one batch for French-speaking clients and one for English-speaking clients.

Split by species, language: Reminders are divided into bundles according to species and client language preference, for example, English Canine, Français Canin, English Feline, etc.

4.2. Mail reminders (mail merge)

Various types of documents can be used to reach clients, including personalized letters, reminder cards and address labels. Depending on your clinic's software configuration, all these methods can be used to create templates with the software or with Word and linked to a particular reminder type.

Refer to any of the following modules for the creation of documents:

Module 7 on management of Word documents

Module 13 on document management and creation (document editor in VetWare/LogiVet)

The method used to print mail merge documents or address labels is the same for all reminder types:

- Locate and select the reminder batch to be sent.
- Choose a group and/or split option.
- Click on the "Print" tab.
- Select the name of the desired template document.
- Select a sorting option.
- Click on the "Print" button.

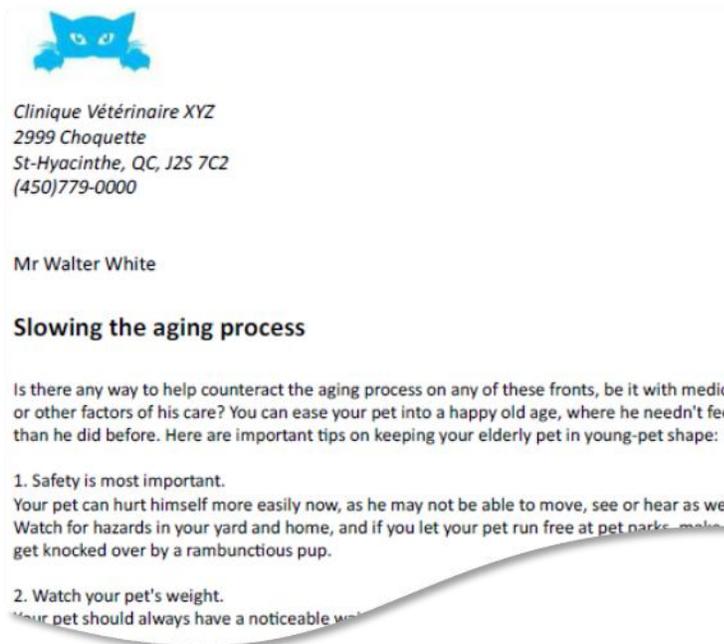Make certain that the correct printer has been selected.
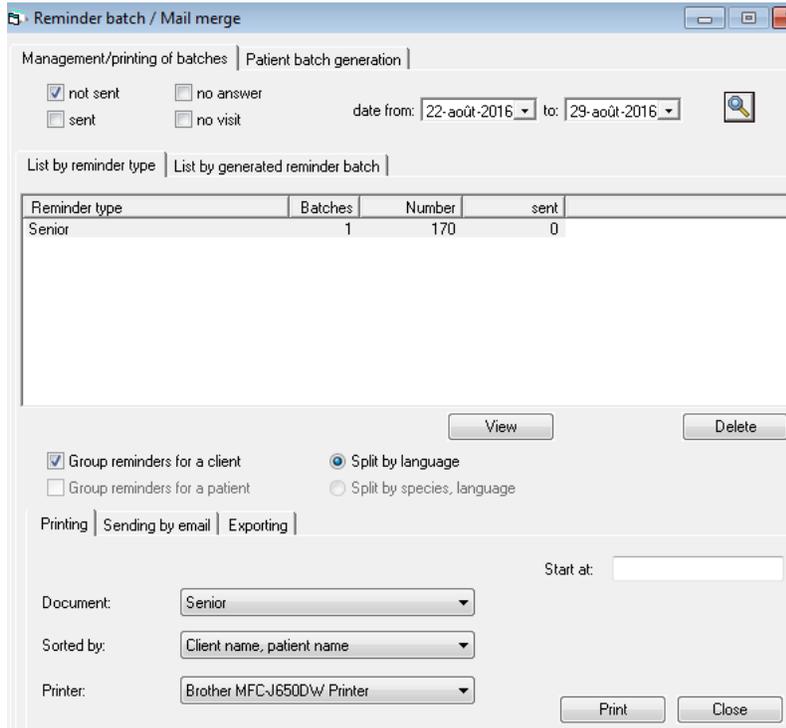
If your batch includes French- and English-speaking clients, two separate print operations will be performed.

Ready to merge and print 35 reminder(s) in English.   Ready to merge and print 80 reminder(s) in French.

Example of a printed document.

4.3 Email reminders

To send email reminders using your software, you can subscribe to the *animail* email message service. With this mass mailing service, you will have a separate email address to ensure that your emails are not identified as spam or junk. First, however, you will need to set up a basic configuration. Refer to Module 16 on A*nimail* communication for all the particulars on this topic.

In brief, you need to follow the steps below for email reminders:

- Select the reminder batch and then click on the "Sending by email" tab.
- Choose the desired "Rmd. *animail*" template.
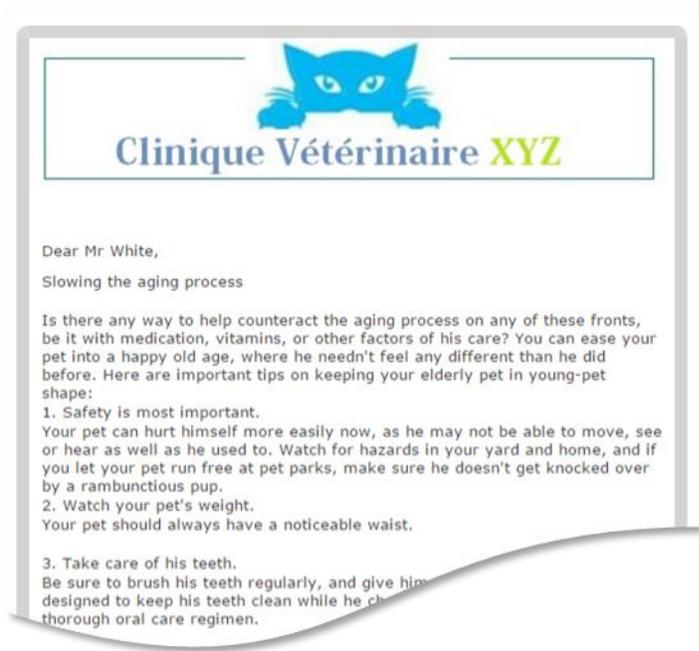- Hit the "Send" button at the bottom of the screen.
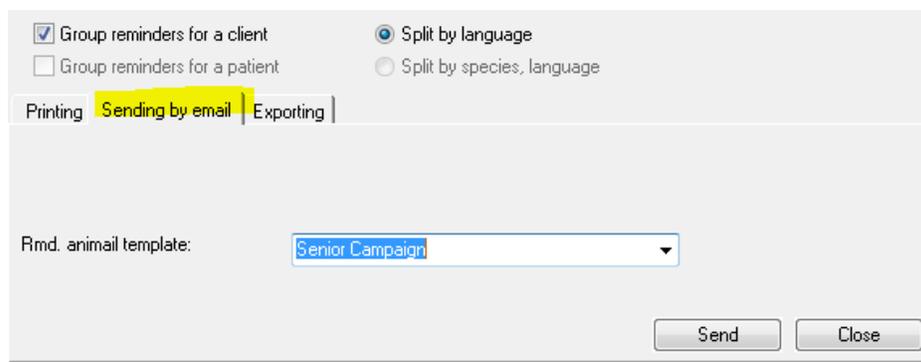
A new window will open to indicate how many reminders will be sent by email.

In the example below, 12 out of 45 reminders can be sent by email.

Click on "Yes" and a new window will appear showing that the reminders were sent.
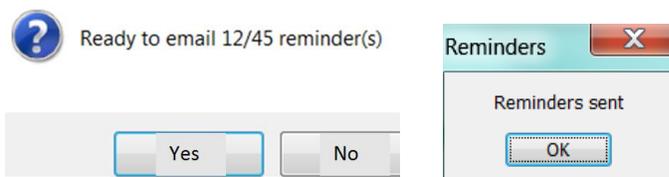
Example of an email message received by one of your targeted clients in the reminder.

The remainder of the clients in this reminder group who do not have an email address can be reached via another medium. Select remaining reminder batches and prepare a postal mailer according to the method in section 4.2. or contact these clients by telephone as per section 4.5.

4.4 Exporting a reminder batch into a file format

It is possible to do an Excel export for the contact information of individuals to whom you wish to send a reminder. This type of file, among others, is required when sending addressed postcards via "VetDirect." Go to cdmv.com, Business Services, to use this service.

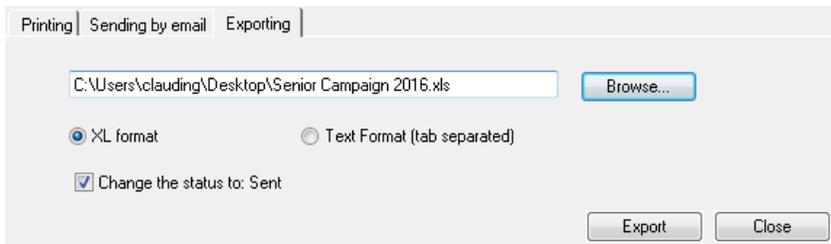Instructions on how to prepare your address file in Excel or text format (.txt):

Locate and select the reminder batch to export.
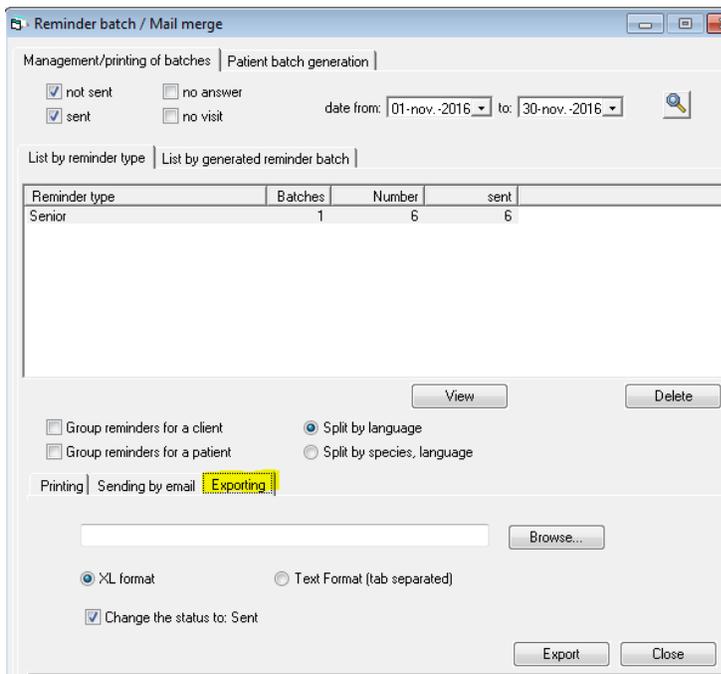
Choose a group and/or split option.

Click on the "Export" tab.

Click on the "Browse" button, name the file and save it in the folder of your choice.


Select the desired file type, i.e., "XL format" or "Text Format."

Check the box "Change the status to: Sent" or leave it empty.
When this box is checked off, the reminder status for the clients concerned will say "Sent" after the batch has been exported.

Click on the "Export" button and a message indicating that the extraction was successfully completed will appear at the bottom of the window. Your ready-to-use file will appear in the location where you earlier opted to save it.

Extraction completed with success
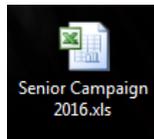
Your reminders will be listed under different tabs in the same file. In the example below, they appear under the "English" and "French" tabs.

	A	B	C	D	E	F	G	H	I	J
	Appel	Prénom	Nom	Adresse	Adresse2	Ville	Province	Postal	Courriel	Nom_Animal
	Mr	Antho	Castelli	654, King-Georges		St-Hyacinthe	QC	J2T 3S6		Pastis
	Miss	Louise	Dion	233, Ferre		St-Eustache	QC	J7P 2P4		Charly
	Miss	Germaine	Carroll	34, Giovanni		Montreal	QC	H7T 6G8		Rover

English / French

4.5 Telephone reminders

The best way to do telephone reminders is by using the "To do list" tool.
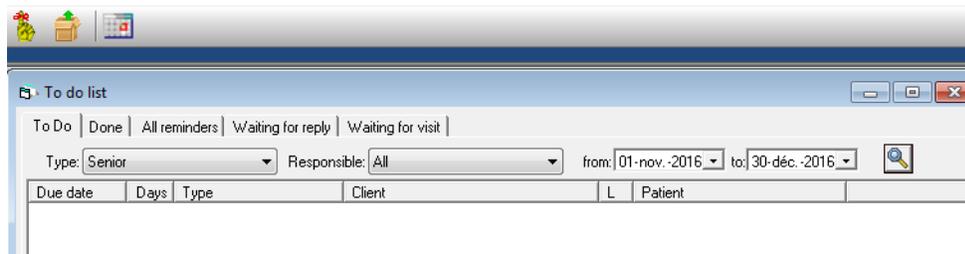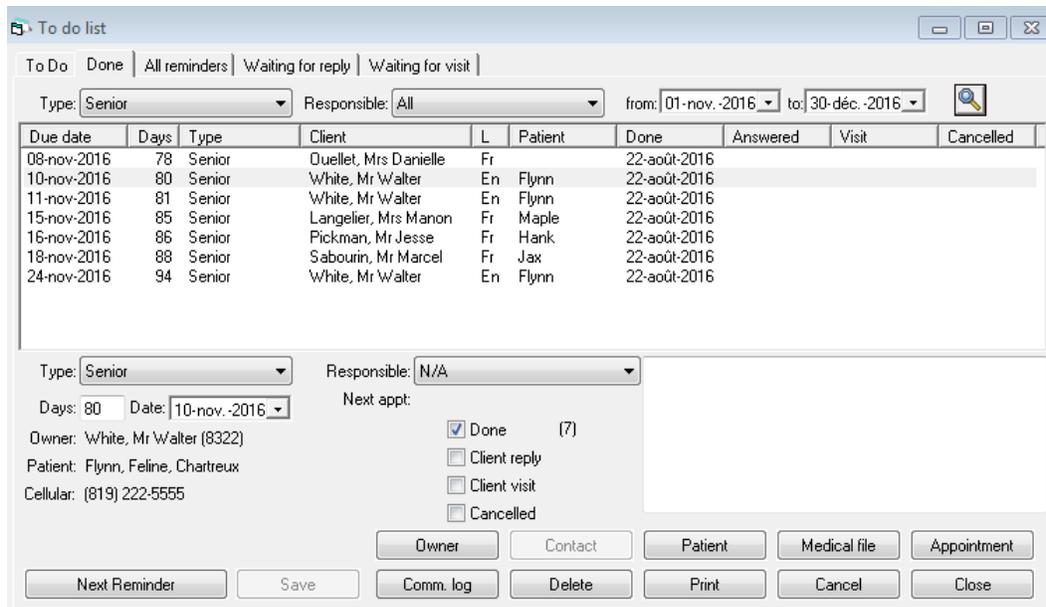

Click on the "To do list" icon:

Select "Type" and "Responsible" and specify the desired date range.

Click on the magnifying glass to do a reminder search.

You can go through all the reminders one by one and contact the pet owners by telephone.

By having the contact information displayed at the bottom, you do not need to close this window to access the folders. By checking off the "Done," "Client reply," "Client visit" and "Cancelled" boxes, you can change the reminder status according to the circumstance.

Refer to section 3.2 of Module 2 on reminders and vaccination schedule for more information on how to use the "To do list."

5. Answer to a reminder

The default setting for the "Visit creation for patient" window will display all reminders listed under the "Answer to a reminder" tab.

As patients present to the clinic, you can check the box in front of the reminder. Presence at the clinic will be taken to mean that the reminder was done and it will be entered into the client reminder history.

6. Measuring the campaign's success rate

In order to know the response rate and help you decide if a 2nd or even a 3rd reminder is required during the Senior Wellness Campaign, we recommend that you use the "Management of batches" tool.

Also, the various reports available in your software will be highly useful and provide you with performance indicators.

6.1 Calculating the response rate using the "Management of batches" function

These various options are used to select the exact status of the reminder before launching a reminder search. They are also useful for evaluating the reminder response rate both during and after the campaign.

Not sent: All unsent or unprocessed (not done) reminders will be selected.

Sent: All reminders already sent or checked off as completed will be selected.

No answer: All reminders for which a response was not received will be selected.

No visit: All reminders for which there was no visit will be selected.

After having checked off "not sent" and "sent" and having selected a date range for your Senior Wellness Campaign, launch a search with the magnifying glass.

In our example, the search yielded 324 "Senior" reminders sent.
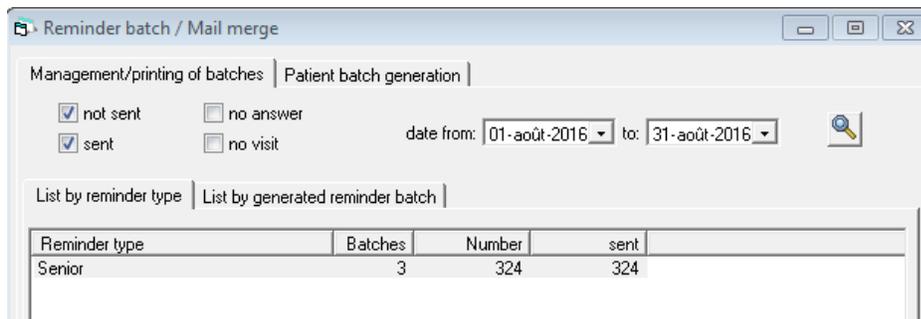
If another search is done with the same date range but selecting "no visit," the result shown is 186 reminders.
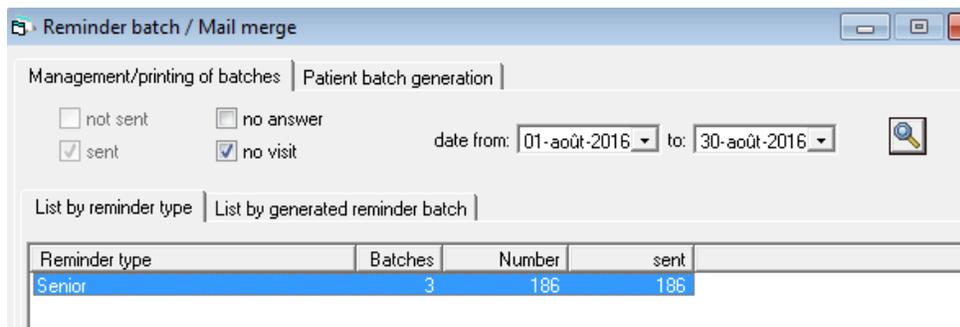

One can deduce, therefore, that to date patient visits did not materialize for 186 of the 324 reminders sent initially, meaning that approximately 57% of reminders did not conclude with a visit.

After reviewing the results, you can decide if you will make another attempt at reaching these people to encourage them to come see you.
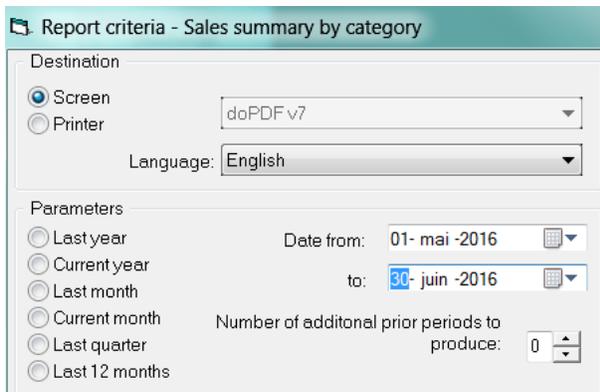
6.2 Reports: Sales statistics

As mentioned previously, various detailed summary reports can help you evaluate the sales generated during the Senior Wellness Campaign thanks to good product and service categorization.
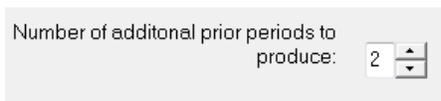
Go to "Report"… "Sales"… "Summary by category."
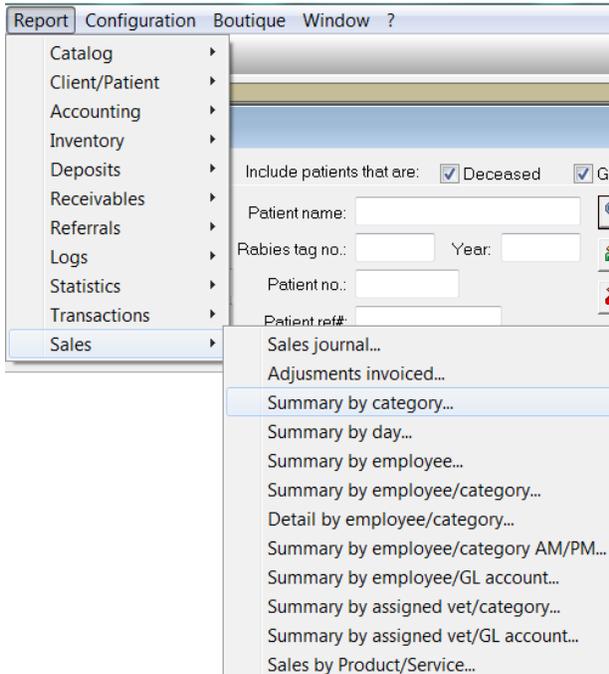
Choose a date range, namely the period for the Senior Wellness Campaign.

To compare sales from one period to the next, you can indicate the number of additional periods to produce.


In the example shown here, the number 2 means that the requested report for the same dates for the two previous years will be displayed.

In addition to printing these reports as needed, it is also possible to export them into different file formats, such as PDF, Excel, Word, etc.

Click on the small envelope icon at the top left and select the desired format. Save in the folder of your choice.
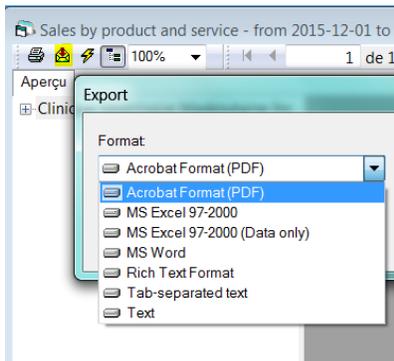
Please refer to Module 8 on reports to learn more about sales and statistics reports.

Have a successful campaign!