

PREVENTIVE CARE STRATEGIES AND SUCCESS

Success Stories &
Practical Insights
for Implementing
or Expanding
Preventive Care
Services

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Fillable Form



MAKING ROOM FOR PREVENTIVE CARE

In a world that's been largely reactive since the COVID-19 pandemic started, practice owners and veterinarians may be wondering how to prioritize or re-emphasize preventive (i.e., wellness) care. Amid adapting to curbside and virtual visits, staff shortages, and emotional burnout, previous preventive care strategies may seem outdated, time-consuming, or impractical. But, despite ongoing challenges, making room for preventive care is essential to ensuring longer, healthier pet lives and improved workplace efficiency. Shelter-in-place and work-from-home schedules have strengthened bonds between owners and pets, and led to a newfound desire to do more and do better with pet care. The clients are here—now, how do you satisfy the rising need?





The following profiles are real-life examples of veterinary professionals who—despite pandemic changes—have successfully expanded their preventive care offerings to include comprehensive diagnostic testing.

They explain how you can power up your practice here and now, with the tools you already have, to bring preventive care to the front lines once again.

IMPLEMENTING AN EXPANDED PREVENTIVE CARE PROGRAM

“[Preventive care] has to start with the doctors. The doctors have to have the right mindset ... You have to have somebody that's a champion that's leading the team that has to believe in this. But, it's one thing for a doctor or multiple doctors to believe. It's another thing to then get the team on board. That really has to be from good education from the doctors.”

— Noel Lucas, DVM

Thanks to well-established preventive care protocols, you could say that Blue Oasis Pet Hospital lived up to its name during the COVID-19 pandemic. While other practices were reeling, this Fear Free® and AAHA-Accredited hospital in Mount Juliet, Tennessee, maintained a steady, calm environment, and a strong commitment to preventive care.

Preventive care champion Noel Lucas, veterinarian, founder, and owner of Blue Oasis since 2013, expanded her hospital's preventive care model to young dogs and cats in 2019. Drawing inspiration and evidence from the IDEXX data on significant findings in preventive care diagnostic tests,¹ Dr. Lucas' team began by introducing the concept of preventive care screening for juvenile and young adult pets at early appointments, as they carefully honed their client education, dialogue, and workflow, to make routine blood work an expected and accepted part of the annual examination for all pet populations — including young adult cats.

“It was really helpful to have [expanded preventive care] starting right at the beginning of the pandemic. It really gave us good footing—we were able to do more with each patient—and it really did help.”

— Noel Lucas, DVM

TEAM EFFORT

Lucas attributes much of their preventive care success to the team's unification and empowerment. With an emphasis on open communication, information sharing, and team education, the entire support staff at Blue Oasis Pet Hospital are able to speak confidently about preventive care and seamlessly integrate sample collection and submission into their normal exam room workflow, using Fear Free® principles, and enhancing client perception and buy-in.

TIPS FOR SUCCESS

- Standardized recommendations for annual wellness panels, beginning at spay/neuter
- Team education on early biomarkers
- Team discussion of abnormal results, to improve understanding and experience real-life examples
- Client education using sound preventive care data
- Client-friendly pricing to improve compliance and team member comfort when recommending wellness panels
- In-room sample collection to enhance the client-veterinary bond, build trust, and save time
- Flexibility to run tests in-house or send out to an external lab to suit practice demands (e.g., high patient volume) on any given day

“This is the reality—we are all very busy. We're overwhelmed. If [preventive care] is something that you want to offer, then you have to really look at your efficiency and flow ... and give yourself permission to fail. Go easy on yourself, because we all know when we try to implement something big, sometimes you have to take it in small chunks.”

— Noel Lucas, DVM

ONE STEP AT A TIME

While you may feel that you do not have the time or headspace to promote or expand preventive care right now, Lucas encourages fellow veterinary professionals to break this worthwhile goal into achievable components, such as:

- Extending appointment times during the initial rollout
- Helping technicians build confidence collecting blood or urine samples
- Requesting on-site, in-house technology training for all team members
- Role-playing communication strategies for standard conversations (e.g., recommending blood work, wellness plans)
- Setting small team goals initially, to help boost motivation and morale (e.g., targeting one life stage, or one species, or running a set number of wellness panels in one week or one month)
- Building on successes with gradually larger goals

¹Data on file at IDEXX Laboratories, Inc. Westbrook, Maine, US

LEVERAGING DIAGNOSTICS AND TECHNOLOGY

“With wellness screens and preventive care, you have to include infectious disease screening and early biomarkers. It's not enough to have basic blood work anymore, because that doesn't catch things until a much later stage. And, when it comes to prevention and wellness, we're talking about catching things before they can actually be seen on an exam.”

— Steve Manyak, DVM

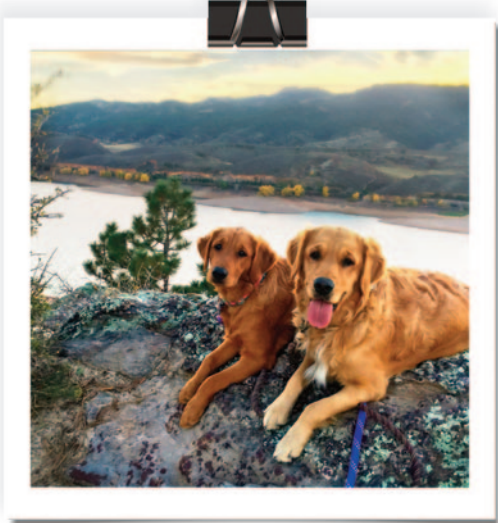
CUSTOMIZED TESTING, COMPREHENSIVE CARE

At Pine Animal Hospital in Long Beach, California, wellness screening is more than a CBC and a chemistry. Prior to the pandemic, owner and veterinarian Steve Manyak partnered with his reference laboratory to design tailored panels for young, adult, and senior pets, to accurately identify early biomarkers for conditions including renal insufficiency and feline heart disease. This comprehensive approach allows Manyak and his associates to diagnose hidden disease, improve patient outcomes, and educate clients about preventive care right from the start—solidifying lifelong compliance.

“In terms of technology and communication ... there are so many different avenues that are open to us today that help us have a stronger bond with our client, which also increases the bond of the client and the patient to the practice.”

— Steve Manyak, DVM





FORCED ADAPTATIONS LEAD TO NEW WORKFLOWS

As a progressive, tech-forward practice, Pine Animal Hospital's pandemic response was as simple as "the flip of a switch." With a well-established and versatile client communication system—including email and text—Pine Animal Hospital's digital communication strategies aligned not only with socially distant care, but also their rising millennial clientele. Many will keep two changes going forward—online history forms and drop-off appointments—both invaluable time savers for the veterinary team.

TIPS FOR SUCCESS

- Customized wellness panels for each life stage featuring biomarker detection
- Online history questionnaires that free up technicians for other tasks, and reduce wait times
- Photo documentation of exam findings, especially for curbside care
- Emailing and texting of lab results, which provides the client with something tangible and decreases the callback list
- Drop-off appointments to prevent backlog and reduce client frustration
- Continual assessment of services from the client's perspective, looking for improvement opportunities

HARNESS THE TECH YOU ALREADY HAVE

Manyak advises other veterinarians to not fear, but to embrace technology and to take risks to discover new ways to improve workflows. Effective use of basic technology can give back lost time by automating or expediting many preventive care tasks.

TIPS FOR SUCCESS



Email

In addition to reminders, use email for test result reviews, resource sharing, follow-up inquiries, and monitoring.



Online forms

Use templates for history, medications, and other diagnostic evaluation forms, such as pain or quality of life scales.



Practice

management software
Chances are, you're not using all your PIMS features. Check into online tutorials, and find time-saving automations that meet your needs.



Text messaging

Don't waste time with phone tag—many clients are more likely to respond to text messages than a traditional call.



Social media

Use your practice's social channels to reach current and potential clients with preventive care messaging before they schedule an appointment, and as an ongoing educational hub. Reference labs and pharmaceutical companies are great resources for shareable client-friendly content.



Virtual visits

Free up the schedule by using video conferencing for non-urgent concerns, consultations, and follow-ups.



Pictures

Let clients see what you see by sharing pictures of points of concern. Drop pictures into the pet's electronic chart for future reference and comparison.



Reference lab portals or dashboards

Graphs or charts can illustrate pet trends over time, helping clients understand disease progression. Shareable client-friendly summaries are a time-saving way to provide further information.

RECOMMENDATIONS AND CLIENT RE-EDUCATION

“There are too many decisions to make in a traditional annual wellness appointment—which vaccines, heartworm prevention, and flea and tick prevention are we going to do? So we have had to really hone in on our recommendations.”

— Kari Wittmer, DVM

KEEPING THINGS SIMPLE FOR SUCCESS
Kari Wittmer, DVM, of Andover Animal Hospital in Andover, Minnesota, admits that while the shutdowns and sheltering orders created their fair share of challenges, they also led to the fine-tuning of her practice’s patient protocols and communication strategies.

Wittmer, along with her team of veterinarians, agreed on a standard protocol for wellness lab work for dogs and cats, to prevent clients being overwhelmed, improve technician efficiency, and streamline care recommendations across the board. Additional bundled services, such as wellness plans, give clients access to top-level preventive care services without overwhelming decision-making or financial strain. Knowing an influx of wellness screening would put pressure on an already overstretched staff, Wittmer suggested email—rather than time-consuming phone calls—to relay normal lab results.

“If you provide great service and show that you not only care about the pet when they’re sick, but you care about the pet when they’re healthy, clients are going to want to come to you when their pet is healthy, as well. [With preventive care] you’re building bonds with those patients during the good times, too.” — Kari Wittmer, DVM

When the preventive care message was eroded by state-wide restrictions on non-essential services, Wittmer got to work re-educating her clientele. Whether curbside or in person, Wittmer ensures her clients have results “in hand” whenever possible by emailing lab results, digital X-rays, trend graphs, and other visual resources. This tangible product enhances not only understanding, but also appreciation and perceived value—without increasing appointment times.

TIPS FOR SUCCESS

- Standardized preventive care recommendations delivered with clear, direct language
- Bundled preventive care packages
- Simplifying client options to increase compliance
- Offering a price-break for healthy pet blood work
- Sharing results and findings wherever possible, including lab reports, X-rays, and other imaging, to enhance client understanding and value for normal and abnormal results
- Focusing on providing strong services, and not relying on pharmacy, to maintain the bottom line, ensure stability, and promote growth through times of change
- Establishing annual blood work as a standard reminder service, not an extra

REWRITING THE RECOMMENDATION SCRIPT

Wittmer’s firm commitment to preventive care is evident in her team’s recommendation strategy, which is built on clear, direct, and specific language, noting that every word counts.

Skip passive, noncommittal language	Try clear and direct phrasing
Would you like to ...	 Your pet needs ...
We could run some blood work	 Blood work will give us key information, including insights into Buddy’s kidney and liver health.
Here are some options	 This is the panel your pet’s veterinarian recommends.
Buddy isn’t sick, but ...	 Pets are experts at hiding illnesses. Healthy pet lab work lets us establish a baseline that we can use as a comparison when Buddy isn’t feeling well.
Blood work is always a good idea	 Blood work is necessary because ...
The wellness plans include many services	 The wellness plan includes everything the veterinarian wants for your pet.



“Our message is, we would rather take care of healthy pets, not sick pets. And the best way to keep pets healthy is to focus on some of the basic core principles—preventive care.”

— Jeff Fagan, Practice Manager

“Our newest staff member asked me, ‘At what age do you start doing blood work?’ I said, ‘When they walk through the door.’ I said, ‘I will never be mad at anybody for recommending blood work’ ... and most of the recommendations are coming from the staff. They’re not coming from me. They just hear how passionate we are about preventive care.”

— Raquel Fagan, DVM

BUILDING A CULTURE OF EMPOWERMENT

“I have five full-time technicians. And, we’re essentially a single-doctor practice ... not many single doctor practices have that many technicians. So, I let them be technicians. They do everything technical. They are all so efficient at knowing what I’m going to want, and I think that’s because I let them do their job ... I give them respect.”

— Raquel Fagan, DVM

T GROWTH IN A TIME OF CHAOS

The lucky pet owners who discovered central Florida’s Shamrock Animal Hospital during the early pandemic found a relatively normal-functioning veterinary practice. While owners Jeff and Raquel Fagan, DVM, took appropriate precautions, they kept the doors open for in-person appointments as well as curbside services. The Fagans initially scaled back their preventive care, but acquired an abundance of new clients seeking traditional face-to-face visits. Those clients have since returned for the comprehensive and compassionate veterinary care, including convenient wellness plans that remove financial barriers to top-shelf preventive care.

TECHNICIAN EMPOWERMENT

The thoughtfully managed workflow at Shamrock Animal Hospital allows maximum scheduling, with three rooms running at once. Dr. Fagan’s commitment to veterinary technician education and utilization builds confidence, competency, and mutual trust in her tight-knit team, allowing her to spend more time with pets and clients.

TIPS FOR SUCCESS

- Multi-tiered wellness packages that include annual screening tests and blood work
- Monthly payments, so owners can easily comply with recommended services
- An emphasis on preventive care and pet owner education that instills expectation—clients anticipate and embrace annual testing as what is best for their pet
- Consider the merits of both in-house diagnostics and reference labs when determining what method is most efficient and beneficial for your practice or a given test
- A fully equipped in-house laboratory that provides rapid results for non-well and pre-surgical patients, preventing diagnosis delay or repeated visits
- Entrusting technicians with sample collection, processing, and client communication for healthy pets
- Well-described standard operating procedures, to ensure technicians can anticipate upcoming needs, and prevent lag time
- Increased online and in-app communication, to avoid staff members being tied to a phone or desk

BUILDING A STRONGER TEAM

Shamrock Animal Hospital's "culture of empowerment" is grounded in education, trust, and appropriate task delegation. This supportive culture in turn improves workflow, morale, and job satisfaction.

TEAM LESSONS



Communication — Encourage technicians to lead preventive care conversations with clients.



Preparation — Consistent protocols help new and current team members know what to expect for routine appointments.



Delegation — Entrust technicians to perform role-appropriate tasks and skills.



Diagnostics training — Increase efficiency by ensuring that every team member can confidently run all diagnostic equipment.



Educational opportunities — Share unusual cases with the team, lead in-house skill-building labs, post or share links to interesting articles or papers, offer CE incentives, and create in-clinic mentorship opportunities, to encourage junior team members and cultivate future leaders.

SUPPORTING CLINICAL DECISIONS WITH DIAGNOSTICS AND ARTIFICIAL INTELLIGENCE

“Prioritizing preventive care may feel like a little bit of work right now, but long-term it will help in terms of finding disease earlier, improving our confidence in the treatments that we're recommending, and knowing that we are providing for our patients the care they deserve.”

— Maggie Canning, DVM

As a practicing veterinarian and the lead product manager of clinical decision support at IDEXX, Maggie Canning, DVM, merges data analysis with practical applications. Through embedded clinical support software, Canning's work helps veterinarians and their teams build confidence and improve efficiency in decision-making through results interpretation, case management, and test recommendations. While artificial intelligence in diagnostics can concern some, Canning stresses that intuitive software is meant to aid in—not replace—human clinical judgment and diagnosis, by detecting subtle changes over time.

ROUTINE SCREENING ENHANCES DIAGNOSTIC ACCURACY

“Feeding ‘the machine’ with really high valued and accurate data will lead to a more broad and robust story about what’s going on with any given patient, which allows for more effective detection of subtle changes. ‘Machines’ can bubble up to us the little bitty changes that happen over time. And so, making those decisions to recommend a blood panel preventively, is going to pay off for the patient in the long run.”

— Maggie Canning, DVM

With machine learning, “normal” routine blood work creates more than a baseline. Every input adds to the patient’s cumulative data, creating a broader and deeper picture of internal function, leading to an earlier-than-ever diagnosis or medical intervention.

COMMUNICATING THE VALUE WITH DATA

“Being able to show that [diagnostic] picture to my clients—whether it’s curbside or in the exam room—with something as simple as a graph that trends over time, can make the transition from data technology and artificial intelligence to how this will help make wellness decisions for their pet much more understandable.”

— Maggie Canning, DVM

Canning believes advanced diagnostic technology can enhance the pet owner’s perceived value of screening pets while they are young and apparently healthy, improving compliance

and, ultimately, the pet’s quality of life. While providing measurable data to identify or explain a pet’s clinical condition is nothing new, charting subtle—previously undetectable—changes in client-friendly formats, such as graphs or charts, brings large amounts of complex data into an accessible—and resonant—understanding for every pet owner.

SHARING RESULTS, BUILDING RELATIONSHIPS

While uncovering hidden illness is one of the quickest ways to bond a client to your practice, Canning points out that taking the time to review test results creates an opportunity for veterinarians to share their knowledge, instill confidence in the veterinary/client relationship, and promote a preventive-care mindset. Basic screening tests, such as vector-borne disease testing and fecals, offer limited conversation, while comprehensive testing can spark an ongoing dialogue.



WHAT'S PREVENTING YOUR TEAM FROM ACHIEVING FULL PREVENTIVE CARE POTENTIAL?

Whether you're looking to implement a new preventive care program, revamp your pre-pandemic approach, or expand your services, the first step is a thorough review of what's currently working—and what's holding you back. Identifying and addressing current snags in your workflow can open up more time for preventive care, without overburdening your team.

Complete the following statements to learn where your team could be struggling.

- ❶ **Communication** — In our practice, preventive care conversations start during the:
- Appointment scheduling process
 - Check-in
 - Physical exam

If you're waiting until the veterinarian is in the room to discuss preventive care, you aren't maximizing your potential. Clients should first encounter your messaging when they schedule the appointment, again at check-in, and from the technician as they take the patient history.

- ❷ **Confidence** — When approaching the subject of annual blood work, team members are:
- Confident and direct
 - Reluctant and nervous to discuss cost or purpose

Constructing a culture that emphasizes preventive care can help the whole team gain confidence. Give the staff firsthand experience by encouraging them to perform preventive diagnostic testing on their own pets, and consider lower price points for healthy-pet blood work to boost client compliance and team confidence.

- ❸ **Consistent messaging** — Our team can always/cannot anticipate the veterinarian's preventive care recommendations based on the pet's age.

Consistent messaging presents a professional image and builds trust, while inconsistent recommendations can lead to confusion, frustration, longer appointments, repeated patient sampling, and misquoted costs.

- ❹ **Workflows** — Standard preventive care appointments are:
- Smoothly run from start to finish, with minimal lag time
 - Disorganized, with a lot of back and forth to and from the exam room

Efficient preventive care visits should be time savers, because of their predictable or standardized flow. If your team is struggling to collect samples, order tests, or communicate with clients, you may need to firm up your SOPs, delegate tasks, or provide additional team training.

- ❺ **Support** — True or false? We use our diagnostic partner[s]' client-friendly resources to enhance our preventive care.

From big data studies and leading-edge diagnostic equipment, to clinical support, client-friendly summaries, charts, and handouts, your diagnostic partner[s] should not only provide equipment, but also function as a team member. Is your reference lab working for you? Does your team know what's available?

Do you have the supplies you need?

- 6 **Test results** — The veterinarian/technician/assistant/CSR reports normal test results to clients by phone/email/text.

Implement workflows that help you relay important lab results to clients in the most efficient, but personal, way possible.

- Capture email addresses from clients and send normal healthy-pet test results with a templated email.
- Send emails directly through your practice management software or via messaging in your hospital app.
- Delegate normal results reporting to veterinary technicians, assistants, or CSRs.
- When appropriate, veterinarians may consider discussing mild changes by email to reduce phone calls.

- 7 **Client education** — We always/seldom/never provide the client with test results, X-rays, or informational materials specific to their pet's diagnosis. We always/seldom/never discuss the reasons we recommend preventive care services, and their impact on lifelong health.

Clients will be more likely to see the value of preventive care if they understand how it can help their pet live a longer, healthier life.

- Use real-life data to support the pet's clinical status, or to back up the story of a similar patient to bring home the power of preventive care.
- When appropriate, supply clients with tangible results (e.g., X-ray images, test results) to reinforce the importance of diagnostic testing.

- 8 **Recommendations** — Select the truer statement:

- We make comprehensive preventive care easy by making clear pet-specific recommendations and/or offering tailored care plans or bundled services.
- Our preventive care recommendations require a lot of explanation and decision-making for the client, because they can pick and choose what they want.

Narrowing down care options prevents analysis-paralysis, or service postponement because of cost or lack of clarity. Bundled services or wellness plans can remove cost barriers, and help pets get the care they deserve.





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