

## THE M<sup>3</sup> GUIDE TO GETTING MORE FROM YOUR TELEOS SYSTEM

### **M<sup>3</sup> - Maximise opportunity, Minimise cost, Monitor performance.**

It is widely acknowledged that there has been very little growth in the veterinary industry in recent years. New clients are difficult and relatively expensive to attract, so your primary focus should be on maximising the opportunity you have within your existing client base.

Most practice owners would acknowledge that they don't use the Teleos system to its full potential. There are many ways in which you can use data stored in your system to great effect with very little effort or expenditure. All of the tools described are employed by users of the Teleos system.

Many of the topics are covered in more detail in the document 'New features and things you might have missed' which is available for download from the Teleos website UserZone. There are also numerous other bespoke SQL's to target clients and animals for various purposes.

### **Maximise opportunity**

#### **1. Ensure that your reminder regime is effective**

One of the obvious ways in which you can maximise the opportunity with your existing client base is to focus on recall performance. In times of recession you will find that some clients will forego their pets annual vaccination booster. This is not true of the majority of your clients whose spending power will be the same and you should ensure that you maximise your opportunity to provide comprehensive healthcare plans.

Are you running reminders for wormers, flea treatments, dentals and even weight checks? Clients will not just respond by visiting the practice and buying a single wormer or even having a free diet or weight check. Not only are you increasing the bonding of your clients, footfall increases your revenue.

If you are not already doing so, try running second or even third reminders. You could then follow that up with a telephone list and have a member of your team speak to clients.

For those clients that have missed their annual booster, why not run an amnesty and set the recall program for last year, or even the year before that?

Make sure that you ask each client their preferred method of communication (SMS, e-mail or post) and record this on their record card. E-mail is free and SMS texts are a fraction of the cost of postage.

#### **2. Ensure that pricing is consistent**

It is widely acknowledged that 'missed' pricing is commonplace in veterinary practice. When you have a full waiting room or ops list, pressure can mount and mistakes will be made. Line by line pricing, which relies on the clinicians' memory, will inevitably lead to mistakes. If you don't believe this, randomly select a batch of invoices and check that everything that should have been charged for has been.

Review the structure of your fees list and agree practice-wide protocols for routine treatments. Use pricing macros to set up each component of the treatment. This will ensure that whoever performs that procedure will go through exactly the same process, time after time.

Teleos also has tools that will automatically charge correct pricing based on the weight of the animal. This can be particularly useful for GA fees and neutering procedures.

#### **3. Ensure that you speak to clients about microchipping and overdue treatments**

Clinical warning icons have recently been added to patient record cards. One of these icons is automatically activated if the animal is microchipped and another if there are any overdue treatments such as vaccinations or wormers. Have a glance at these whilst you have the client in front of you.

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### **4. Increase your wormer and flea treatment sales**

Record individual wormer and flea treatment sales against each animal so that a three month reminder can be set. This is easily achieved by setting a 'Multiples' tick box on your work entry scripts. Why not then ensure that any treatments due for each animal are shown at the foot of a client bill or receipt, a very discreet marketing tool.

### **5. Bond your clients further by running a Pet Health Plan**

Teleos now has a specific facility to easily manage a Pet Health Plan (PHP). PHP's usually involve a client paying a fixed amount per month and then getting their pets annual booster, wormers and flea treatments through the year. Additional discounts can also be given against food, dentals, additional vaccinations and so on. This offers value to the client, guaranteed revenue for the practice and a very bonded client.

### **6. Make sure that you follow up your recommendations**

If, during a consultation, you advise a client that their pet requires a dental within the next six months, why not set a follow up to ensure that it is followed through by the practice. This is easily achieved either with a recall or by setting a 'callback' function in your work entry scripts. This allows an entry to be set in a diary page configured for this purpose. You can have callback diaries set for any individual or groups of staff. Tasks can be checked and monitored on a daily basis.

### **7. E-mail your practice newsletter to all your clients**

Most clients may visit you just once a year for annual boosters. At this time, they may pick up one of your printed practice newsletters from the reception desk. This might be one of four per annum and they are missing out on three quarters of your news and promotions.

Why not ensure that your staff get client e-mail addresses and then e-mail a pdf (portable document format) copy of your newsletter? Bulk e-mailing is available through the Teleos program and costs nothing!

## **Minimise cost**

### **1. Spend your marketing budget effectively**

Have a look at how you get new clients into the practice. Use the pop-up questions when registering new clients and record how the client selected you and, perhaps, which practice they previously attended. Analyse the results over a three to six month period. Look at the cost per new client by your various methods of marketing. Spend your budget in the most productive way for your practice - which may not be Yellow Pages!

### **2. Implement a stock control system**

If you are not already doing so, consider setting up a stock control system. This will help to keep your stock levels to an absolute minimum and your cash in your bank, not on your shelves. Recording batch numbers will also ensure that stock does not go out of date. As a minimum, ensure that you use the wholesalers price update files to ensure that you are selling your stock at your *replacement* cost plus markup, not your original purchase cost price.

### **3. Save money by e-mailing your invoices**

The Teleos program can produce a PDF invoice which is then attached to an e-mail. The invoice can be opened and printed off by the client without any expense on your part.

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### 4. Use staff time more efficiently

If you are not already doing so, use the VetEnvoy e-claims facility. This will significantly reduce the administration time taken to process insurance claims and mean that you get paid much quicker as well. Practices using e-Claims report that they are saving at least 50% of their administration time (which probably equates to £3-4k per annum) and getting claims settled in under two days on average.

Laboratory results can be directly imported into the patient record from in-house and external labs. Not only does this save administration time it ensures accuracy and provides a better service to clients, as the clinician is notified as soon as the results arrive.

If you run branch surgeries, look at the spare resource you might have outside of consulting hours. If you have spare time available at branches and are stretched at your main site, why not look at transferring some tasks? Booster reminders are an obvious place to start, but what about mail-shots or phone follow-ups?

To improve the overall customer experience, have a look at using someone away from reception to handle incoming calls during consultation periods. This makes better use of reception time as staff are focussed on clients attending surgery, rather than being interrupted by calls.

## Monitor performance

### 1. Make sure all clinicians are charging consistently

Amongst the numerous reports available within Teleos, have a look at the 'User Performance Reports' found in the management channel. This series of reports analyses individual fee earners and shows individual average transaction fees for routine consultations, vaccination consultations, euthanasia and surgical performance. You can also see who is promoting wormers, flea treatments, ID chips, food and lab tests during a consultation.

In addition, why not randomly print off the 'work done' report from the cashbook and check that everything that should have been charged has been?

### 2. Check your performance rates on reminders

Monitor that you are getting the expected percentage of clients responding to vaccination reminders. You should be achieving well in excess of 60% with 80% being achievable with additional reminders and follow up calls.

### 3. Get External Marketing Data

See how your business is performing compared to others with similar demographics across the UK. This will give you clear indicators as to where you need to focus more effort and give you confidence the measures that you have implemented work. Panelvet is available via VetEnvoy and FDI (Fort Dodge Indices) is also available. Both are free of charge.

### 4. Monitor your active clients

Keep a track of your 'active' clients – you should find that the number will increase by implementing the tools above.

If you have any other ideas that you would like to share with other Teleos users, please get in touch with Jon Hewitt at [jon-hewitt@teleosvet.co.uk](mailto:jon-hewitt@teleosvet.co.uk)