

# ALLYDVM RETENTION CALENDAR

04.28.21

## WHAT IS THE ALLYDVM THE RETENTION CALENDAR?

The Retention Calendar is your ally in **retaining current clients** and **generating additional appointments** for your hospital. It also helps your clinic **improve the quality of client data by collecting inaccurate or missing information** (emails, cell phone numbers, and mailing addresses).

By resolving Retention Calendar alerts, **Greater Annapolis Veterinary Hospital** generated an additional **133 appointments and \$41,000 over a 3-month period.**

During the same period, **Abel Keppy Animal Hospital resolved 46% of alerts**, collecting over 100 pieces of missing contact information and updated records for pets with missing reminders.

**Broadview Animal Clinic**

**Retention Calendar** Manage and track your client retention activities

**Date Picker and Statistics**

February 2021

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13

	Yesterday	This Week	This Month
	5%		2/44
	14%		10/72
	3%		1/33
	0%		0/69
	0%		0/5
	6%		13/223

**Tuesday, February 9, 2021**

Print Refresh Filter Search

2/35 0/77 0/29 0/78 0/5

TIME	CLIENT	PATIENT	CONFIRMED	ALERTS	RESOURCE	TYPES
8:00 AM	Burnell, Amy (20150)	Lexi				Dental
8:00 AM	HEPPNER, MANDY (40577)	Alfred	30 Jan 13:38			Vaccinations
8:00 AM	Soares, Annelise (53012)	Uni	07 Feb 16:34			Examination

## WHAT ARE RETENTION CALENDAR ALERTS?

= Paw Print alert for additional pet(s) in the same household that is overdue or coming due (within 30 days) for reminders and they have not scheduled in the past 2 days or the next 7 weeks).

= Missing Reminder alerts for any active pet with less than 2 medical reminders in the PIMs

= Alert for missing or invalid email, mobile phone or mailing address in the PIMs

**When resolving Mailing Address Alerts, remember addresses can be quite sensitive, since USPS has standard formats for mailing. Generally, USPS prefers abbreviations such as Ave. instead of Avenue, and St. instead of Street.**

If Covetrus is your Online Pharmacy Vendor, remember to use clientnamedeclined@donotmail.com if a client declines to provide an email address. To get full credit for resolving the alert, don't forget to check **"Missing or Invalid Email alerts disabled"**. This applies to Covetrus online pharmacy users only.

# RETENTION CALENDAR BEST PRACTICES

## 5 EASY STEPS TO RETAIN CURRENT CLIENTS AND GENERATE ADDITIONAL REVENUE:

### 1) Make it simple for your CSRs to resolve alerts daily

#### Option 1: Work directly from the Retention Calendar ( *BEST WAY TO RESOLVE ALERTS!* )

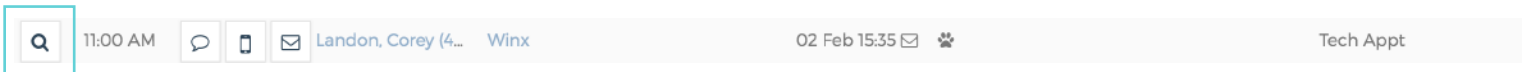
- Each morning, open the Retention Calendar on a secondary monitor (if available)  
\*NOTE: Please reach out to your DL or MRO if you require a secondary monitor
- CSRs should review alerts as clients arrive for their appointments or check-in via text/phone call
- Check-in is a great time to ask clients for missing contact information so they can receive important updates from your hospital
- Remember all client information should be entered directly into the PIMs

#### Option 2: Have limited desk space? Print the Retention Calendar

- Each morning, open the Retention Calendar and click the "Print" button
- Once missing information is gathered, don't forget to update in the PIMs
- Paw Print and Bell alert details will be unavailable on the printed version (You must hover over/click on these alerts in the Retention Calendar to see which pet(s) are past due or missing reminders)

### 2) Use the Magnifying Glass to view ALL alerts for a client

- This will save you time by viewing all alerts and specific details at once



### 3) All alerts are important; however, Paw Prints alerts retain clients AND generate additional revenue

#### HOW TO RESOLVE PAW PRINT ALERTS

- ✓ Book Appointment for Pet(s) in PIMs or OBT
- ✓ Remove reminder for Pet(s) in PIMs (stop code)
- ✓ Suspend reminder for Pet(s) in PIMs
- ✓ Update reminder so pet(s) no longer past due or due in the next 30 days in PIMS
- ✗ Mark Pet(s) or Client as inactive in PIMs
- ✗ Discuss past due pet, client declines
- ✗ Select "All Retention Calendar Alerts Disabled" box in AllyDVM
- ✗ Select "All Alerts Disabled" box in AllyDVM

#### PAW PRINT KEY

- ✓ Resolved; added to numerator ("DONE")
- ✗ Not Resolved; remains in denominator ("TO DO")
- ✗ Invalid; removes from Retention Calendar, deducted from denominator

Paw Print Alerts % =  
Paw Print Alerts DONE  
Paw Print Alerts TO DO

- The easiest Paw Print alerts to resolve and convert into an appointment are vaccines
- Remember - don't get discouraged by clients not booking. Not every Paw Print will result in an appointment. The goal is to convert 10-15% into appointments.

### 4) Lean on your other team members to resolve Paw Print alerts

- Some hospitals print the Retention Calendar for upcoming patients in the morning and make note of which pets are overdue
- Doctors and technicians use this list when talking to the clients

### 5) Ask for Help!

- We offer sessions every week. [CLICK HERE](#) to register. It's not just for Hospital Managers; invite your team
- Don't get discouraged it takes time to achieve 10-15% alert resolution.
- Feeling stuck? Email [marketing@nva.com](mailto:marketing@nva.com)

# MONITOR RETENTION CALENDAR PROGRESS

## REMEMBER TO MONITOR THE USE OF THE RETENTION CALENDAR IN YOUR CLINIC

As a hospital manager, you should review the AllyDVM Retention Calendar Stats report weekly to determine how many alerts are being addressed by your CSRs

**To run the Retention Calendar Stats report, follow the below steps: (RECOMMENDED)**

- Reports > Core Reports > Retention Calendar Stats > Select Last 7 Days

**You also have the option of running the report for past 30 days by selecting:**

- Reports > Core Reports > Retention Calendar Stats > Select Last 30 Days

## ALLYDVM RETENTION CALENDAR BENCHMARKS:

New users (using AllyDVM less than 6 mos.) should resolve 10% of all alerts

Established users (using AllyDVM for more than 6 mos.) should resolve at least 15% of alerts and strive for 30%+

**Stevens Point Animal Hospital** NVA - K ARNETT

**Quick Charts:** Last 7 Days Last 30 Days Last Year

**Quick Comparisons:** Last 7 Days vs Previous Period Last 30 Days vs Previous Period This Year vs Last Year

**From:** 01/26/2021 **To:** 02/01/2021

☐ Compare to another period

**Run Report**

Report Summary				
ALERT TYPE	TO DO	DONE	PERCENTAGE DONE	MISSED OPPORTUNITIES COST ⓘ
Pets Past Due	17	2	12%	\$2,308
Pets Missing Reminders	22	9	41%	\$2,987
Missing or Invalid Email	16	3	19%	
Missing Cell Phone Number	7	3	43%	
Invalid Mailing Address	0	0	0%	

= PETS PAST DUE)

## REMINDER!

By not addressing the AllyDVM Paw Print (pets past due) and pets missing reminders alerts daily, your hospital will leave revenue on the table! This is the low hanging fruit opportunity for your practice!