

# From First Reminder to Final Refill: Building Client Compliance at Every Stage of Care



## A SPOTLIGHT ON CLIENT COMPLIANCE

Veterinary teams make clinical recommendations every day: diagnostic screenings, nutrition changes, dental procedures, parasite prevention, chronic medication plans, rechecks, refills, and long-term monitoring. But a recommendation only improves a pet's health when the pet owner understands it, accepts it, and follows through.

Treatment compliance is more than an exam-room conversation. And with increasingly price-sensitive clients, acceptance of recommendations is a concern during every stage of care.



**37%**

Of US pet owners visited the veterinarian and declined care <sup>1</sup>

**70%**

Of US pet owners cite financial reasons as the driver of declined care <sup>1</sup>

**Diagnostics**

Are the most declined veterinary services <sup>2</sup>

In many practices, compliance is treated as something that happens during the appointment. The 'yes' or 'no' the veterinarian receives after recommending care. But in reality, pet owner compliance starts much earlier.

**Before**

It begins before the appointment with proactive education and expectation-setting.

**During**

It continues during the visit with clear communication, financial transparency, and team alignment.

**After**

It is reinforced after the appointment through reminders, follow-up, refill support, and ongoing communication.

Modern veterinary teams need a compliance workflow, not just a compliance conversation.



This guide breaks the compliance journey into three stages: before care, during the exam, and after the visit.

The goal is simple: help more pets receive the care they need, provide pet owners with ways to afford care, and reduce manual touchpoints for busy veterinary teams.



## *PART 1:*

# Compliance Starts Before the Appointment

Pre-visit communication offers an opportunity to set client expectations. This educational touchpoint can be the difference between a client saying 'yes' to a cardiac screening or being open to a nutritional conversation, or saying 'no'.

When a client hears about bloodwork, nutrition changes, dental care, or additional diagnostics for the first time in the exam room, the recommendation can feel unexpected. Unexpected recommendations are easier to delay. They may feel optional, expensive, or disconnected from the original reason for the visit.

Proactive communication also gives pet owners a chance to do their own research, enroll in pet insurance if needed, and come to the appointment prepared for the discussions you want to have.

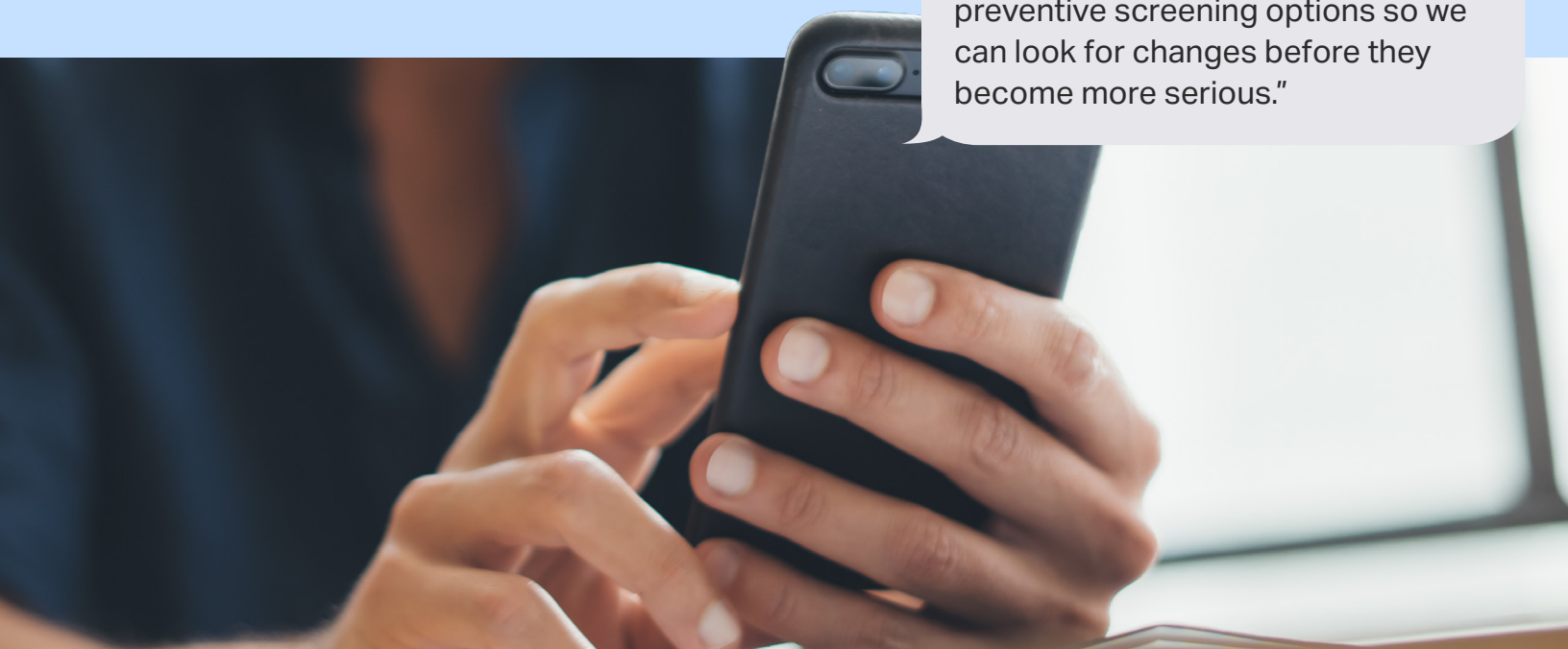
## Use these tips to prepare clients to accept at-visit recommendations:

### **Use appointment reminders to educate and prepare pet owners.**

Instead of sending "Bella has an appointment tomorrow at 10:00 AM." Try:

This type of reminder does more than reduce no-shows. It prepares the client for the clinical conversation.

"Bella has her senior wellness visit tomorrow at 10:00 AM. At this visit, we'll review her mobility, weight, nutrition, dental health, and preventive screening options so we can look for changes before they become more serious."





### **Improve the specificity of appointment reminders.**

Generic reminders are easy to ignore. Patient-specific reminders feel more relevant.

Puppy or kitten visit:

"Tomorrow we'll review vaccines, parasite prevention, nutrition, socialization, and any questions you have about home care. Please remember to bring a stool sample!"

Adult wellness visit:

"We'll review vaccines, parasite prevention, weight, dental health, and any lifestyle changes that may affect your pet's care plan. Before your visit, give your pet a thorough pat down so we can discuss any lumps and bumps. We've got a new screening tool that can quickly evaluate them."

Chronic care visit:

"We'll review how the current treatment plan is working, whether refills are needed, and whether follow-up testing is due before continuing medication."

Senior pet visit:

"We'll review mobility, comfort, nutrition, dental health, and screening tests that help us detect changes earlier. For senior pets, we recommend a cardiac screening blood test. We can discuss more at your appointment."



These messages help the pet owner understand that the appointment is not just a transaction. It is part of a larger care plan.



### **Use pre-visit digital forms to uncover obstacles and opportunities.**

Consider adding questions such as:

- ★ What food, treats, supplements, and table foods does your pet currently receive?
- ★ Are you having trouble giving any medications at home?
- ★ Are there any cost concerns you would like us to be aware of before we review recommendations?
- ★ Are you interested in learning about wellness plans, membership options, or payment options?
- ★ What is your biggest concern for today's visit?

Pre-visit forms also make the appointment more efficient. The veterinarian and technician can spend less time uncovering basic information and more time addressing the highest-value parts of the visit.





### **Start nutrition conversations before the appointment.**

Making nutrition part of a medical care conversation is crucial to changing at-home behaviors.

**Examples:** "Please send or bring a photo of your pet's food bag, treats, supplements, and feeding instructions to your appointment."



"For pets with kidney disease, nutrition is part of the medical plan. We'll review your cat's appetite, current diet, and transition options during the visit."

The goal is not to overwhelm the client before the visit. The goal is to signal that nutrition is clinical, not optional.



### **Educate and enroll in pet insurance early.**

Especially for budget-conscious pet owners, make sure they understand the full benefits of insurance coverage. These benefits can have a significant impact on the cost of care for those with senior pets.





## PART 2:

# During the Appointment, Make the Recommendation Clear and Easier to Accept

The exam room is where the recommendation becomes real. This is where the team connects the pet's clinical findings to a specific next step. It is also where the client may start weighing cost, fear, uncertainty, logistics, and competing priorities.

Compliance improves when the veterinary team makes the recommendation clear, explains the "why," checks for understanding, and provides the client with a realistic path forward aligned with their goals and budget.

**Clients are more likely to act when the recommendation is specific.**

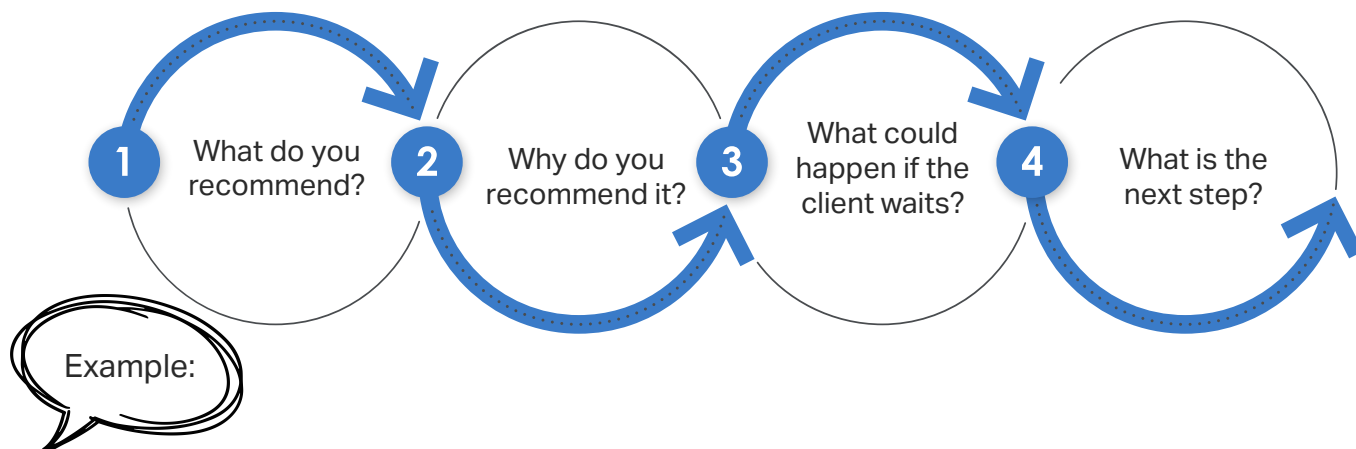
Use clear language:

"I recommend we schedule Luna's dental cleaning within the next 30 days. She has visible tartar and gum inflammation, cats are masters at hiding pain, and even though she's eating normally, she'll feel a lot better after a cleaning. We have a few different tiers for dental cleanings to make sure we can align Luna's procedure to fit within your budget."

The goal is not to pressure the client. The goal is to remove ambiguity, explain why the procedure is needed, and reassure them that you have a spectrum of care options.

### Use a simple four-part recommendation structure

A practical structure for clinical recommendations is:



"I recommend senior bloodwork for Max today. At his age, bloodwork helps us check organ function, thyroid health, and early disease markers that we cannot see on a physical exam alone. If we wait until he is visibly sick, we may have fewer options. We can collect the sample during today's visit and review the results with you when they come back."

This type of recommendation gives the client enough information to understand the value without burying them in medical detail.



## Use “chunk and check” communication

Veterinary appointments often involve a lot of information. Clients may hear a diagnosis, medication instructions, a cost estimate, a recheck plan, and a nutrition recommendation in the same visit.

Breaking the conversation into smaller pieces helps. After each section, ask: “What questions can I help answer?” Pay close attention to the pet owner's body language and make sure you’re meeting them where they are at.

If their intake paperwork indicated they were operating under a strict budget, make sure you’re sensitive to that during the conversation and offer options they can afford.



## Align the whole team around the recommendation

Compliance is rarely driven by one person. It is influenced by everyone the client interacts with. Inconsistent recommendations across the care team can erode trust and make clinical recommendations feel optional.

A consistent team workflow might look like this:

- ★ Automated intake forms and proactive messages are sent to the pet owner.
- ★ The technician reviews the pre-appointment communications, confirms the history, identifies barriers, reinforces the need for preventive care, and communicates with the veterinarian to make sure they’re reinforcing the recommendations the veterinarian will make.
- ★ The veterinarian makes the diagnosis and primary recommendation.
- ★ The technician reviews home care instructions and demonstrates medication administration. These instructions are also sent via text message after the appointment.
- ★ The CSR at checkout schedules the recheck and confirms the next step.
- ★ The client receives a post-visit text message summarizing the plan and providing a communication channel for questions.

When every team member reinforces the same message, the recommendation feels more important and less optional.



## Talk about cost early and clearly

Cost is one of the most common barriers to compliance. Avoiding the topic does not make it easier for the client. It often makes the final recommendation feel more stressful.

A useful approach is to normalize the conversation:

"There are a few ways we can approach this. I'll explain the ideal plan, then we can discuss what makes sense for today and what we should schedule next."

This allows the team to preserve the medical recommendation while still being practical.

## Use care memberships as a compliance tool

Care memberships can help clinics reduce financial friction around preventive and ongoing care.

A Care Membership conversation might sound like this:

"Based on what we discussed today, Bailey would benefit from regular preventive care, screening, and ongoing dental monitoring. We offer Care Memberships that can help spread care costs across the year and make future visits more predictable. Would you like us to show you what that could look like for Bailey?"

At checkout:

"Before we finalize today's visit, I want to mention that Bailey may be a good fit for our Care Membership. It can help make future care easier to plan for, especially since she is entering her senior years."

## Otto Care, A Different Kind of Membership Plan

Otto's flexible membership plans allow you to develop a customized Membership Plan that fits the way you practice. Learn how Otto Care is helping veterinary clinics drive:

**55%**

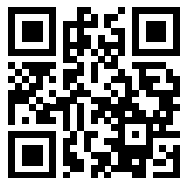
More visits annually  
from Care Members

**2.17x**

More revenue from  
Care members

**47%**

Higher ATC from  
Care members



Learn more at  
[otto.vet/otto-care](https://otto.vet/otto-care)

## PART 3:

# After the Appointment, Reinforce the Plan

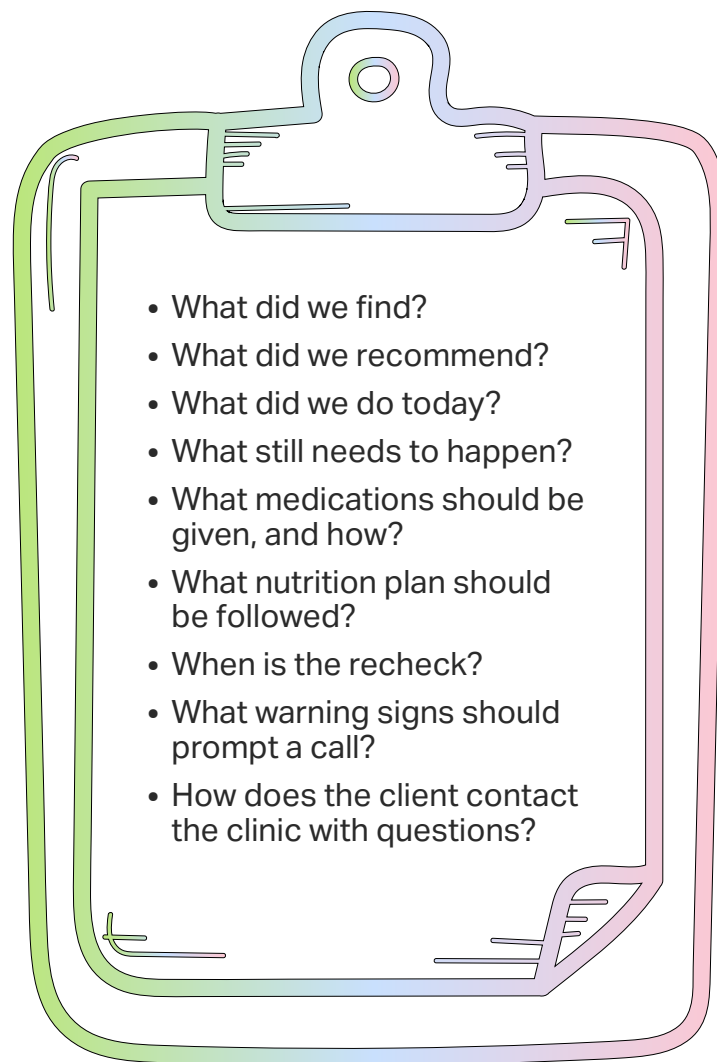
A client may agree with the recommendation in the exam room and still fail to follow through at home.

They may forget the instructions. They may become confused about medication timing. They may struggle to get the pet to eat the new diet. They may run out of medication. They may lose the estimate. They may intend to schedule the recheck, but never call.

Post-appointment communication closes the gap between agreement and action.

### Send a clear post-appointment summary

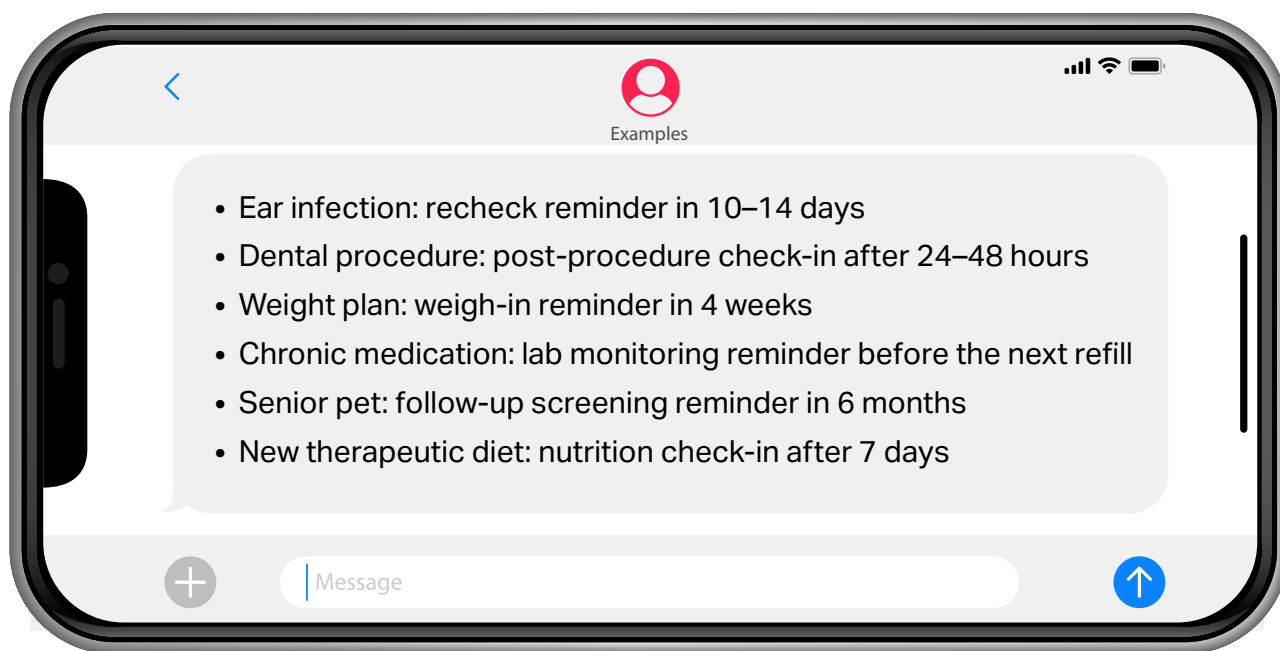
Every medical visit should end with a written summary that answers the client's practical questions:





## Talk about cost early and clearly

Many compliance failures happen because no one on the veterinary care team owns the next step. Automation helps reduce those gaps. Examples:



## OTTO FLOW CAN HELP

Flow makes it easy to automate communication at every step of the care journey, before, during, and after the veterinary visit. Bi-directional PIMS communication ensures that communications are visible to the entire care team. From refill requests to two-way texting and self-serve appointment booking, Flow connects the dots between every critical communication touchpoint to keep clients engaged and compliant.



Learn more at  
[otto.vet/otto-flow](https://otto.vet/otto-flow)



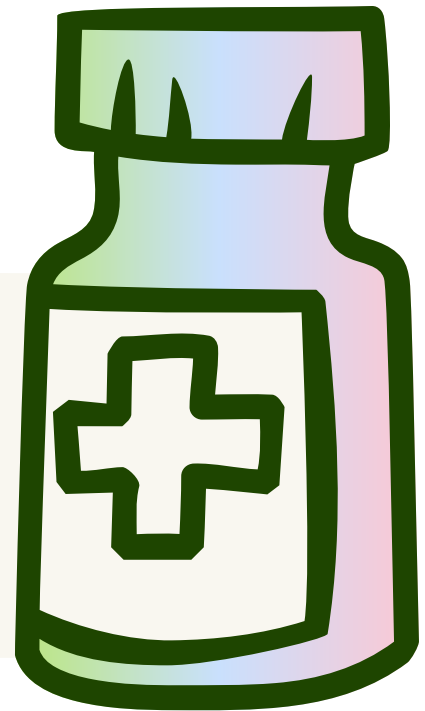
## Make refill requests easy

Medication compliance often breaks down when the client runs out of medication, does not understand refill requirements, cannot easily reach the clinic, or starts price-shopping with online retailers.

This is especially common for chronic conditions such as allergies, arthritis, seizure disorders, endocrine disease, cardiac disease, and kidney disease.

Improve refill compliance and keep refills in your clinic by:

- ★ Sending reminders before the medication runs out.
- ★ Explaining whether lab work is required before the next refill.
- ★ Giving clients a simple refill request path.
- ★ Using two-way messaging for questions.
- ★ Tracking refill-related tasks so they do not get lost.



A refill message might say:

"Bella's medication may be running low soon. If you need a refill, you can request it here. Because this medication requires monitoring, Bella will need lab work before the next long-term refill is approved."

This kind of message does two things: it makes the refill easier and explains the medical reason behind the requirement.



## Support nutrition compliance after the visit

Nutrition recommendations are rarely resolved in a single conversation.

A client may leave the clinic with a therapeutic diet recommendation and then face practical problems at home: the pet refuses the food, another family member feeds treats, the transition is too fast, or the client is unsure how much to feed.

Post-visit communication can help.



### Use Automated Texts as a Compliance Tool

After 3 days:

"How is Cooper doing with the diet transition? If he is refusing the new food, reply here, and our team can help adjust the transition plan."

After 2 weeks:

"Reminder: Cooper's nutrition plan is designed to support his weight loss goal. Please continue to measure meals and limit extra treats. Contact us if you are having trouble with appetite, stool changes, or begging."

After 4–6 weeks:

"Cooper is due for a weigh-in so we can check progress and adjust his plan if needed."

This type of communication makes the client feel supported instead of judged.

## USE OTTO FLOW'S TWO-WAY MESSAGING AND NUTRITION AUTOMATIONS TO KEEP CLIENTS ENGAGED

Many clients do not call when they are confused. They stop the medication, abandon the diet, skip the recheck, or wait until the problem gets worse.

Two-way messaging gives clients a lower-friction way to ask for help. Otto also has pre-built automations to keep clients engaged with nutrition plans.



## **PART 4:**

# **Build Compliance Into Practice Operations**

Compliance improves when it becomes part of the practice's operating system.

That means the practice manager should not only ask, "Are doctors making recommendations?" The better question is, "Do our workflows make follow-through easy?"

### **Create recommendation pathways**

For common care categories, define what should happen before, during, and after the appointment.

Examples:

#### **Senior wellness pathway**

- ✦ Before the visit: send a senior wellness reminder explaining screening, mobility, dental health, and nutrition.
- ✦ During the visit: recommend appropriate diagnostics and review life-stage changes.
- ✦ After the visit: send summary, lab explanation, and follow-up reminder.

#### **Dental pathway**

- ✦ Before the visit: preview that dental health will be assessed.
- ✦ During the visit: grade dental disease, explain risks, provide estimate, and recommend timing.
- ✦ After the visit: send estimate, scheduling link, and educational follow-up.

#### **Chronic medication pathway**

- ✦ Before the visit: ask about medication response and missed doses.
- ✦ During the visit: review effectiveness, side effects, and monitoring needs.
- ✦ After the visit: automate refill reminders and lab monitoring prompts.

#### **Nutrition pathway**

- ✦ Before the visit: collect food, treat, and supplement information.
- ✦ During the visit: give a specific feeding plan.
- ✦ After the visit: send written instructions and progress check-ins. Make it easy to digitally opt in to automated nutrition plans with food auto shipping.





## Track compliance metrics

Practice managers should identify a small number of metrics that show whether recommendations are turning into action.



These metrics help the team identify where the workflow is breaking down.

For example, if dental recommendations are high but scheduling is low, the issue may be the estimate conversation, fear around anesthesia, lack of follow-up, or no easy scheduling path. If refill requests are delayed, the issue may be unclear monitoring requirements or poor task routing. If nutrition plans are not followed, the issue may be insufficient post-visit support.





# Common Compliance Scripts for Veterinary Teams

## Pre-visit senior screening message

"Because Bella is entering her senior years, we'll review more than vaccines at her upcoming visit. We'll also assess her weight, dental health, mobility, nutrition, and whether screening bloodwork is recommended. These screenings help us look for changes earlier, often before pets show obvious symptoms."

## Preventive care recommendation

"I recommend this screening because it gives us information we cannot get from the physical exam alone. If everything looks normal, we have a healthy baseline. If something is changing, we can respond earlier."

## Nutrition recommendation

"Nutrition is part of the medical plan, not just a lifestyle choice. Based on what we're seeing today, I recommend switching to this diet and following a measured feeding plan. We'll check in after the transition starts so we can help if your pet resists the change."

## Recheck recommendation

"The recheck is important because we need to confirm the infection has fully resolved. Pets can look better before the problem is completely gone, and stopping too early can allow it to return."

## Refill and monitoring message

"We can help with the refill. Because this medication requires monitoring, we'll need updated lab work before approving the next long-term refill. This helps us make sure the medication is still safe for your pet."

## Care Membership conversation

"Bailey is a good candidate for ongoing preventive care, screening, and regular visits. Our Care Memberships can help make that care more predictable across the year. I can show you what a plan would look like based on Bailey's needs."

# Otto Flow Keeps Clients Compliant and Veterinary Workflows Smooth

Otto Flow helps veterinary teams keep clients engaged before, during, and after the visit with automated communication tools that support compliance and reduce manual work.

- Send smarter appointment reminders that prepare clients for recommended care
- Use digital forms to uncover questions, barriers, and refill needs before the visit
- Reinforce care plans with post-visit summaries and follow-up messages
- Automate recheck reminders, refill prompts, nutrition check-ins, and ongoing care touchpoints
- Give clients an easier way to ask questions through two-way texting
- Simplify diagnostic, insurance, and nutrition workflows with pre-built campaigns.
- Make scheduling the next step simple with self-serve appointment booking
- Keep communication visible across the team with bi-directional PIMS connectivity

With Otto Flow, practices can build compliance into everyday workflows, helping more clients follow through while keeping busy veterinary teams focused on care.

Learn more or book  
a demo at [otto.vet](https://otto.vet)

