

# 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.**



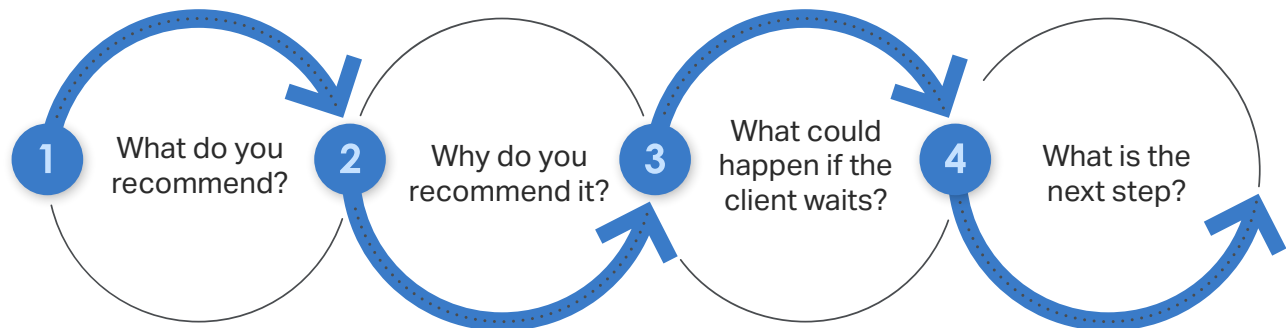
## USE CLEAR LANGUAGE:

"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:



## Example:

"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)

