NEW CLIENT APPLICATION PROVEN PROCESS

Purpose: To build a bond with new clients based on our shared goals
Objectives: To make clients feel welcome and to do a thorough job in meeting their expectations
Time frame: Training is implemented upon hire
Oversight Responsibility: client care team, client experience coordinator
Performance Responsibility: practice manager, client experience coordinator

Step 1: Practice manager approves, declines or wants more info and notes any special details in a body of email forwarded to client experience coordinator (CEC) and new client scheduling manager (NCSM) or lead client care specialist on shift.
Step 2: Lead client care specialist on shift enters *all* new clients and their pets in the new client tracker google sheet including any notes written in the body of the forwarded email. If the pet has Instagram, the account must be followed and a "hello and welcome to Healing Paws!" direct message sent.
Step 3: Preferably lead CCS enters the client and pets into eVet, but, if time does not permit, these applications may be forwarded to a fellow CCS as they must be entered in the same business day.

- All new clients (whether approved or declined) must be entered as clients, placing the new client app in the documents section of the client. This document must be titled "approved new client application" or "declined new client application"
- Approved clients must also have the pet/s entered and the pet information copied into the notes section of the pet. If FAS is noted please put "potential FAS" in the pet alert and ask the nurse team to review the record to see if our new client FAS package is warranted.
- Declined clients do not need their pets entered into the system. Clients who are declined need a client alert created NEW CLIENT APP DECLINED DATE.

Step 4: If the new client was *approved*, the lead CCS or NCSM sends the welcome email from evet -the pet for which an appt was requested must be assigned to this email! In this email, two choices for appointment date and time must be entered and any notes pertaining to services requested (example: Owner requested a nail trim in application (We would add a note in the email: Please note we no longer offer grooming services but we'll be happy to refer you to a groomer for Finley's pedicure) before sending. You may hold these appts in eVet but ONLY FOR 24 HOURS. Therefore, you must record these choices on the new client tracker and the date you put them on hold as you must release these appts from hold if not deposited and reserved within 24 hrs of that email going out.
Step 5: For all declined clients, the lead CCS emails the client through eVet using the template "Decline New Client"
Step 6: When approved clients reach out to choose their appointment, they are welcomed, asked if they have any questions, the appt is reserved and the exam deposit is taken. The appointment they have chosen is reserved and the other appointment on hold for them is opened up for other clients.
Step 7: On your new client tracker, you need to check daily for approved clients who have not responded to their welcome email. If the client has not been in touch within one business day of sending out the email, please call the client to welcome them, ask if they received their email, reserve their appt and take their deposit. If they do not answer, leave a message and see if they can be reached out via Vet2Pet or text (when we have texting systems). If they do not answer the second call made in 24 hrs, do not continue to contact the client and move them to the "no response" tab of the new client tracker.
Step 8: Welcome card is sent to the new client.
SPECIAL SITUATIONS: Occasionally an application will require more information before the decision to approve or decline is made. In these situations, the CEC will call the client and address those questions. Then they will make the decision, following either the decline process above or taking the deposit and reserving the appointment while on the phone but still sending the welcome email (just not with appt choices).

Check !	Contacting The Client and Reserving the Appointment Action	Who Does It?

	RECEIVING NEW CLIENT APPLICATIONS Daily check email for jot form applications. Review application - forward to client care team and client experienced coordinator. In body of email, mark as “approved” or “declined” -if any special things noticed advise on how to move forward, if “declined” give team an idea of why so that they can communicate that gracefully to client	Practice Manager
	TRACKER AND INITIAL WELCOME CONTACT 1) When practice manager forwards the app to you-enter the client and each pet in the new client tracker. Mark as “approved” or as “declined or TBD” Enter any notes the practice manager wrote in the email forward in the “notes” section of the tracker. Enter the 2 appts you placed on hold and the date you placed them on hold. 2) If app approved, send the welcome email from evet -the pet must be assigned to this email! 3) If app declined, send the “decline new client” email from evet.	New Client Scheduling Manager or Lead CCS
	CLIENTS WHO ARE TBD AS WE NEED MORE INFO: Check notes in body of forwarded app email and see what the questions may be. Contact any clients whose application *needs more info or who are declined* - decide based on the call whether to approve or decline and update tracker. If client is worried about cost, send them our costs at a glance graphic and make a note for lead client care specialist to reach out to them again the next day to see if they/we want to move forward.	Client Experience Coordinator
	RESERVING THE APPT If client has not responded to email within 12 hours after email sent (but within 12 hrs) call owner to collect deposit and reserve the appointment. Update the tracker and move the client to the “complete” tab. If client does not answer call, they have only a total of 24 hrs until you release the hold on the appointments and move the client to the no response tab of the tracker.	New Client Scheduling Manager or Lead CCS

Check!	Entering Clients and Pets Action	Who Does It?
	ENTERING CLIENTS INTO eVET **Approved clients:** Using the instructions above,enter the client information details upload app into client documents section as “approved new client application”. Be sure to add last vet clinic information in the client info section. If the owner says “no” to social media, mark CLIENT alert “no social media”. If they say yes, be sure to mark SMS enabled. Be sure to enter the appropriate client’s first name in the phone description area. **Declined Clients**: Enter the client information and check off “do not email” box. Do not enter any pet information. Upload app into client documents section as “declined new client application”. **ENTERING PETS INTO eVET** 1)Enter pet details into evet including picture (easiest done as a shift/windows/s snipping tool to get the picture not to be turned sideways), microchip, and prior records if owner included them, be sure to enter reminders, and to separately upload lab work, see above for FAS notes, if owner did not include records, please call for them. Note: After the pet is entered and records have been uploaded, whiteboard Illona to enter the reminders.	Client Care Specialist Client Care Specialist
	PETS WHO HAVE INSTAGRAM When entering pets who have instagram accounts, client care specialist should whiteboard the CEC that the pet has an IG account and tell them the handle. CCS should also put in the pet alert “Instagram Pet”. CEC then should follow the account and send a “hello and welcome to Healing Paws!” direct message.	Client Care Specialist Entering Record AND Client Experience Coordinator
	WELCOME CARD CCS should write a welcome card to the new client. CEC has a template for writing the card.	Client Care Specialist

Check !	Welcome Kit Action	Who Does It?
	CREATING THE WELCOME KIT Prep a branded bag with pet's name & last name w/ a leash or cat toy and any pertinent brochures/handouts. Place in New Client Welcome bin.	Client Care Specialist Who Enters Records
	GIVING OUT THE WELCOME KIT When the nurse goes to get the pet, the liaison should also go see the client and take them their welcome kit	Liason

Check !	Future Action	Who Does It?
	Call client to welcome to the practice and go over their questions/concerns and what we plan to accomplish	To be decided in the future