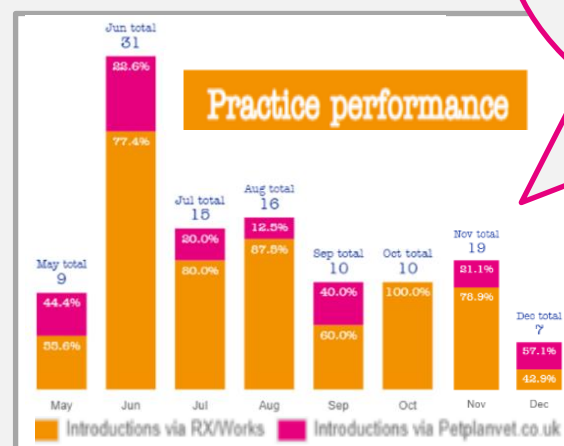


A QI Project to Improve 4-Week Free Insurance Offer

Clair Price – Practice Manager Blackwood



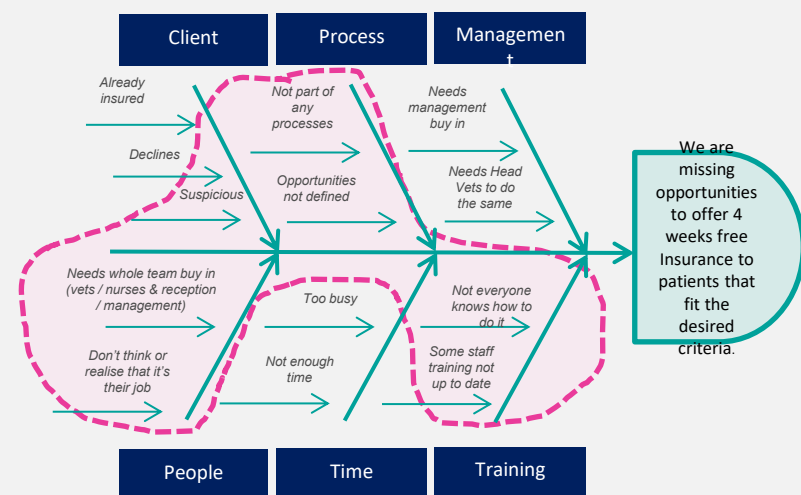
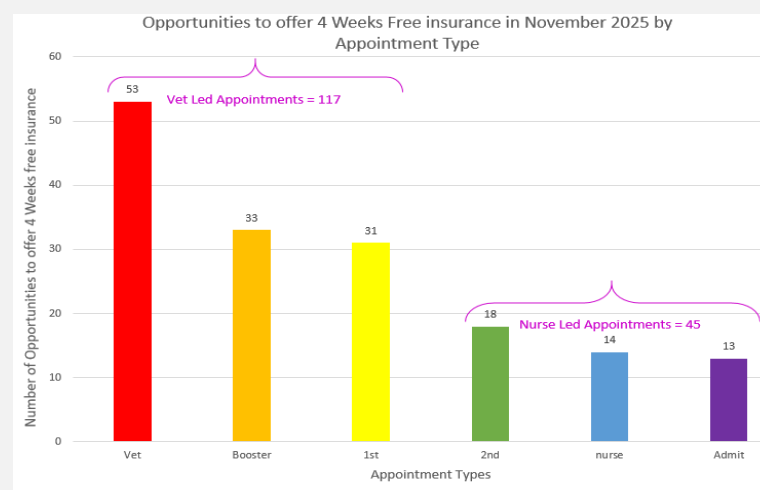
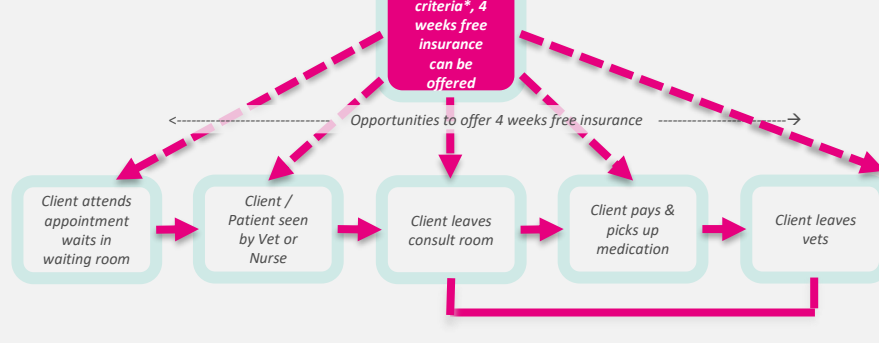
BACKGROUND



PROBLEM
Failure to offer 4 weeks free pet insurance, reduces policy uptake which limits pets access to essential treatment. This decreases practice revenue and leaves staff and clients frustrated.

I identified that we were missing opportunities to offer patients 4 weeks free insurance when they visited the practice. This is available for any for any cat, dog or rabbit that is between 6 weeks & 18 months old and has been seen by a vet or nurse that day.

DIAGNOSTICS



AIM & MEASUREMENT DEFINITION

To Increase the number of times that 4 weeks free insurance is offered to clients within a 3 month period

To increase the number of times that 4 weeks free insurance is offered to eligible patients from 25% to 75% by March 31st 2026.

SPECIFIC
MEASURABLE
ACHIEVABLE RESULTS
FOCUSSED
TIME-BOUND

Chosen measure
- Missed Opportunities (i.e. Number of opportunities to offer 4 weeks free insurance verses how many clients were offered).

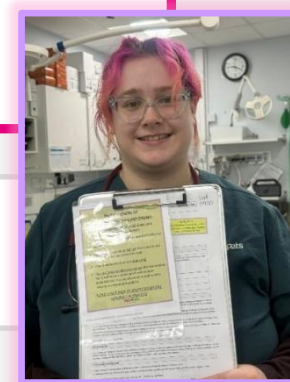
- Criteria
- All cats, dogs & rabbits
 - Have seen a vet or nurse on that day
 - Are aged between 6 weeks & 18 months
 - Have not already taken up 4 weeks free insurance more than 3 times in the past.
 - Have not had 4 weeks free insurance in the last x weeks.

Data will be given to reception team members initially.

Exclusions
Patients that do not meet the criteria.
Patients that already have insurance.
Patients critically ill.
Not looking for data on how many clients accepted, activated the offer or took out a full policy or which member of staff made the offer.

CHANGE IDEAS

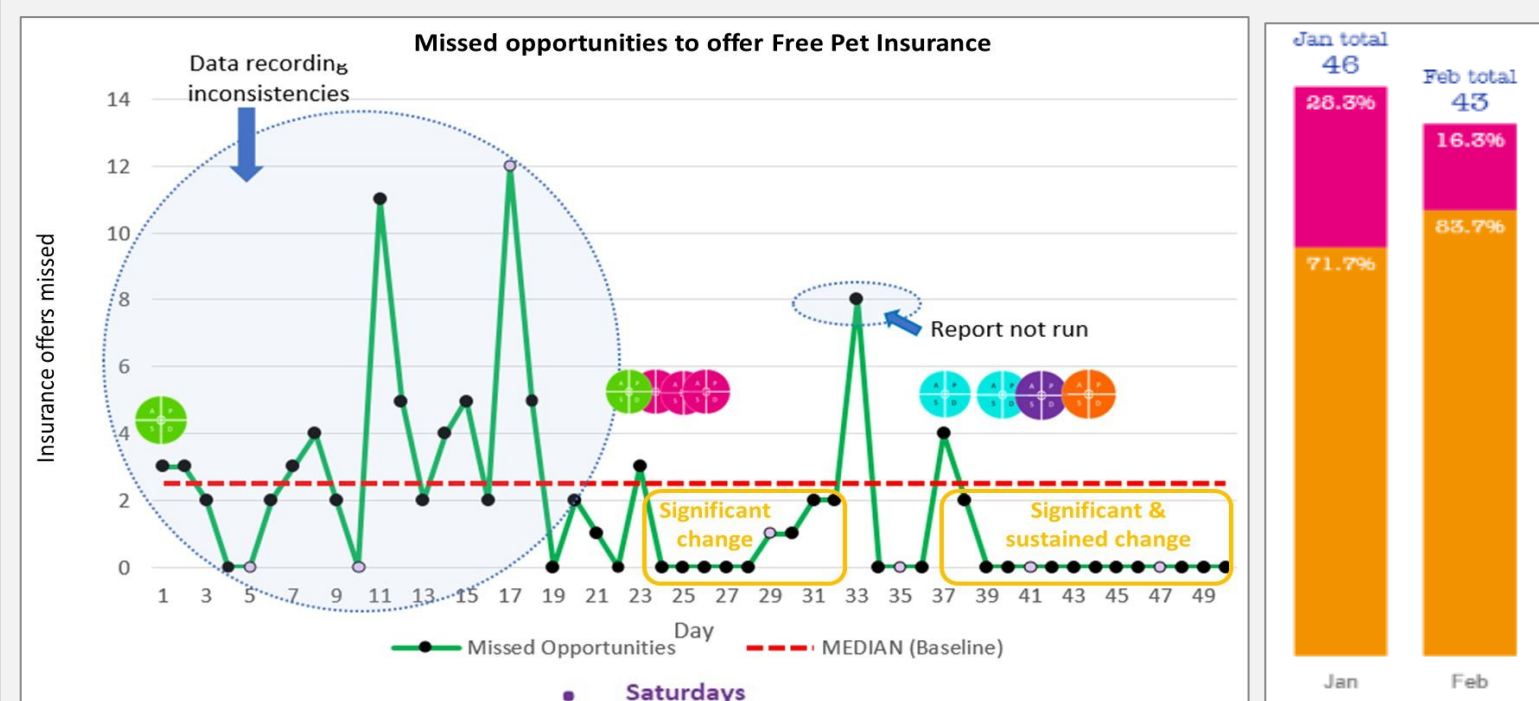
- Stickers on all vaccine cards (regardless of criteria)
- Stickers on admit forms for patients that meet criteria
- Educating staff about importance of insurance and the impact it has
- Hands on Demo showing how easy it is to sign a customer up to 4 weeks free Ins to encourage nurses and vets to do it themselves.
- Use the appointment report daily on reception to make it easy to see patients that meet the criteria.
- Mark patients in Bold on the PMS diary to inform everyone that insurance needs to be offered.
- Mop up session at end of the day – call or message clients that have been missed to offer opportunity.
- Vets & nurses discuss insurance very briefly in consults
- Vets & nurses give out insurance leaflets in consults
- Vets & nurses sign clients up directly
- Review script people are using when offering 4 weeks free and standardise.
- **ASK THE TEAM FOR IDEAS**



PDSA cycles

1.1	Run a daily report to show each of the eligible patients who can be offered 4 weeks free insurance	Feedback from Reception team was positive with good engagement. The report gave the details we hoped for, however the checklist was completed inconsistently.	The report was generated for 17 out of 20 days. Some of the data on the report was not completed and there were differences in how the data was being recorded.	Adapt & Extend
1.2	Continue to generate a daily report / checklist with confirmed eligible patients. Share with reception team and ask them to record which patients were offered 4 weeks free insurance.	Feedback from Reception team remained positive, engagement was good. The report continued to provide the details we hoped for. Consistency of data improved.	The report was generated for 6 out of 6 days. The data showed an improvement in the number of offers being made.	Adopt
2.1	Speak to one member of the nursing team about how they identify that a client maybe eligible for 4 weeks free insurance.	Attended 5 patient admit appointments and observe the process.	The nurses <u>did not</u> identify if patient was eligible for 4 weeks free insurance (even though the patients age is on the admit form they are holding). They also seemed to struggle with saying that they could be eligible for 4 weeks free insurance. To offer was not part of their process.	Adapt & Extend
2.2	Speak to one member of the nursing team about how they identify that a client maybe eligible for 4 weeks free insurance.	Attended 5 patient admit appointments and observed the process.	The nurses did not identify if the patient was eligible for 4 weeks free insurance (even though the patients age is on the admit form that they are holding). They also seemed to struggle with saying that they could be eligible for 4 weeks free insurance. To offer was not part of their process.	Adapt & Extend
2.3	Introduce an 'Insurance Introduction Card' as a way to communicate client interest from nursing team to reception team.	Issue the Card to 5 clients whose pets meet the criteria. Attend the Admit appointment and observe the process.	Insurance was offered to eligible patients. Nurses gave 'Insurance Introduction Card' to those clients who were interested. All cards were returned to reception and this resulted in 3/5 clients signing up to 4 weeks free Insurance. Nurses seemed comfortable with identifying that this patient was eligible and gave the client the card.	Adopt
3.	Introduce the Insurance Introduction card used for Nurse admits to the consult nurse.	Issue the Card to 5 clients whose pets meet the criteria. Attend the Nurse Consult Apt and observe process.	Worked really well, Nurse followed the same process as used in the nurse admit consultations.	Adopt
3.1	Share the QI Story board with the whole nursing team	Sit with each of the nursing team and go through the changes that have been implemented and ask for engagement for the new changes	Feedback was positive, most of the team had become aware of the stickers and the Laminated Introduction cards.	Adopt
4.	Create a WhatsApp message template that can be sent to missed opportunities each day.	Ask the reception team to send a WhatsApp message to any client on the days report that were a 'missed opportunity'. Message must be sent on the same day as the pets visit and should be sent using the 4 weeks free Insurance template already created.	Team Agreed to use and to make a note on the Daily opportunities report to say WhatsApp message sent. Will then say offered Y and will capture if client accepted offer or not. Will monitor usage over the coming weeks by reviewing the daily Report.	Adopt
5.	Share Stats with whole team.	Share PetPlan graph & internal graphs to whole team in a WhatsApp message to demonstrate improvement and offer thanks to everyone involved over last 2 1/2 months.	Message sent, feedback good. Team were very proud of what had been achieved in less than 3 months. Stats will be shared on a monthly basis.	Adopt

RUN CHART



CONCLUSION & LEARNING

The project increased offers of 4 Weeks Free Insurance from 25% to 79%, the team frequently reached 100% of eligible offers in a day. The run chart showed a statistically significant change from day 23 (>5 data points below the median line), with a sustained change from day 37. Petplan data showed a clear month-on-month rise confirming reliability and sustainability.

We learned that eligible opportunities were higher than external reports suggested, real-time data owned by reception created clarity, motivation, and accountability. Clear criteria and a simple process built confidence and consistency, small repeated behaviours drove meaningful improvement, engagement, communication, and a shared understanding of why the offer matters were essential to success.

REFLECTIONS

This project showed the importance of measuring everyday processes, and once the true number of missed opportunities became visible, the team became more proactive and confident in offering 4 Weeks Free Insurance. Clear criteria and a simplified focus helped everyone work more consistently.

Using the Model for Improvement was valuable, because having a clear aim, a simple measure, and small PDSA cycles made progress quick, visible, and easy to adapt. It helped the team understand what worked and build change step by step. A key learning was the challenge of creating change that continues without constant oversight, but shared ownership of data, clear routines, and visible results helped the process become reliable without depending on one person. The improvements strengthened team confidence, supported better access to care, and showed how small QI steps can create lasting change.

Acknowledgements to Mentor –

Dr Elly Russell MA VetMB CertAVP(GSAS) PhD MRCVS
Head of Quality Improvement and Veterinary Operations Vets4Pets

