

Estimate Communication Checkpoints

Communicating estimates with clients can be challenging, especially when you aren't sure exactly what other members of your team have already spoken to them about.

The following document is designed to be used to standardise the way estimates are given, communicated and recorded. Completing an Estimate Communication Checkpoints document can also assist with handovers and equip your whole team with the confidence to give an estimate in a consistent and transparent way.

Complete the following sheet on a case-by-case basis.

 Pet name

 Date

 Team member(s)



GENERAL ESTIMATION COMMUNICATION

Has a specific estimate been given?	Yes / No	Notes	Name
Has a broad range been given?	Yes / No	Notes	Name
Have potential additional costs been discussed?	Yes / No	Notes	Name
Have risks or limitations been discussed?	Yes / No	Notes	Name
Has the client been invited to ask questions?	Yes / No	Notes	Name



INSURANCE

Does the owner have insurance?	Yes / No	Notes	Name
Has the insurance information been updated/added onto our system?	Yes / No	Notes	Name



EMERGENCY AND OUT OF HOURS

Has the client been talked through potential emergency costs? (- i.e. in the situation where there isn't time to call/ talk to owner as the priority is saving the animal's life etc - patient is stabilised 1st then the client is called.)	Yes / No	Notes	Name
Has the client been talked through potential out of hours costs?	Yes / No	Notes	Name
Has the client confirmed understanding?	Yes / No	Notes	Name



OTHER NOTES
