



# The Continual Business Growth of Fear Free Certified Practices

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## List of Abbreviations

|            |                           |
|------------|---------------------------|
| <b>EMR</b> | Emotional Medical Record  |
| <b>FAS</b> | Fear, Anxiety, and Stress |
| <b>PVQ</b> | Pre-Visit Questionnaire   |
| <b>ROI</b> | Return On Investment      |
| <b>RPP</b> | Revenue Per Patient       |
| <b>YoY</b> | Year Over Year            |

# Introduction

In the practice of veterinary medicine, we—the veterinary healthcare team, educators, consultants, and vendors—are always working to improve the health and welfare of our patients. Fear Free is one of the areas practices have focused on in the last few years, and this paper is meant to outline some of the trends seen. We know that, even though we are “all about the pets,” there are the clients, the team, and the business that must also receive our attention. Any new service or product is scrutinized for the impact on all of these groups. The practices involved in this particular study have supplied their data because they too are interested in following the correlations between implementing Fear Free techniques and changing business metrics.

There will always be a number of operational changes and strategic moves to improve business metrics, and Fear Free is one of them. The implementation of Fear Free education has a positive impact on pets, and the correlations are showing that it makes good business sense, as well.

# Fear Free: Impacting Pets, People & Practices

Fear Free is an innovative education company serving veterinary professionals, pet professionals, the shelter community, and pet owners to help prevent and alleviate fear, anxiety, and stress (FAS) in pets and provide in-home enrichment. By looking after both the physical and emotional wellbeing of pets, Fear Free is uniquely positioned to improve pets' lives and strengthen the human-animal bond.

Founded on the science of behavior and backed by leading experts in the areas of veterinary behavior, anesthesia, internal medicine, and other specialties, Fear Free is committed to providing best-in-class programs, courses, and resources to the veterinary and pet communities.

In our profession, we strive to provide excellent patient care and client service, help our team to advance in the profession, and ensure sustainable business activities. Since its inception, and continuing to this very day, Fear Free has been improving all of those targets. Why? Because Fear Free is integral to the most common reason people get involved in the veterinary profession: to prevent or relieve animal pain and suffering. According to Fear Free founder and CEO Dr. Marty Becker, there are two powerful forces propelling Fear Free in every aspect of veterinary practices: pets need the people in charge of their physical and emotional wellbeing to embrace Fear Free fully, and pet owners want veterinarians and others who care for their pets to ensure they're both happy and healthy.

With Fear Free, patients win, the team wins, and pet owners win. But don't take just anyone's word for it. Natalie Gruchow, CVPM, SHRM-CP, is the practice manager at the Animal Health Clinic in Fargo, ND, and she sees the impact Fear Free has had at her practice firsthand. Patients are coming back more often and with less fear for follow-up care. Pet owners no longer dread the trip to the vet, and the team no longer suffers from compassion fatigue due to the stress and anxiety of trying to provide medical care to patients in the throes of FAS. Natalie will admit that implementing Fear Free did not happen overnight; it was more of a cultural transformation. Committing to Fear Free values soon became a job requirement, and Natalie has noticed that top candidates are seeking Fear Free practices, which makes her recruiting job easier.

Fear Free may have taken years to develop, but it quickly became an overnight success because it spoke to the very heart of the veterinary profession. There is a ripple effect in the fact that Fear Free does not only impact the patient; it also impacts the pet owner, the healthcare team, and the business. Fear Free is now becoming a part of the strategic plan for many veterinary practices. As Natalie noticed, business operations, recruiting, and retention involve Fear Free values, and financial data shows the positive effects of Fear Free. It is wonderful to see when investment in one program benefits so many areas, like operations, human resource management, and finance.

The story of Fear Free does not end when a person or a practice becomes certified—it's just beginning. The positive effects spread from that first patient to every patient that walks through the hospital front door. It spreads from that first certified team member to an entire practice. All it takes is that first step. Starting that journey provides professionals with the tools and techniques needed to deliver the best possible care for pets as well as an ever-growing community of like-minded professionals. With more and more pet owners actively looking for Fear Free veterinary and pet care, those professionals and practices are well-positioned to benefit both emotionally and financially.

Fear Free's story started back in 2016, and each year, veterinary professionals, pet professionals, shelter professionals, and pet owners around the world adopt its values and add more chapters to the story. Kathryn Primm, DVM, CVPM of Applebrook Animal Hospital in Ooltewah, TN, puts it in perspective best: "Fear Free is the way it always should have been. I was the first person on the planet to be certified, and I was still too late!" When did your Fear Free story start?

# Worldwide & Cross-Professional Reach

Today, more than 55,000 professionals have become Fear Free Certified and more than 84,000 professionals have registered for the various Fear Free veterinary and pet professional programs. They can be found across the United States, Canada, and more than 50 other countries. Fear Free Certified Practices are 140 strong and growing. In total, more than 125,000 veterinary professionals, pet professionals, shelter professionals, and pet owners have registered to benefit from Fear Free's education, tools, and resources.<sup>1</sup>

Fear Free has made such a difference in the welfare of pets that it is now part of the curriculum at more than 20 veterinary schools. Alastair Cribb, DVM, PhD, Dean of Cummings School of Veterinary Medicine and Henry and Lois Foster Professor said: "Fear Free became a priority in veterinary education because it helps keep our students and our patients safe and helps us graduate better veterinarians." Since fear and stress is minimized in both pet and veterinary student, the student can focus on providing medicine and delivering better outcomes.

But the benefit does not stop there. Fear Free increases job satisfaction and makes work fun, according to Bryan Slinker, DVM, PhD, Professor and Dean Emeritus Washington State University College of Veterinary Medicine. "Job satisfaction, rooted in knowing one is delivering the best medicine and care for all involved with the life of the pet, is critical," he said.

The phrase "bedside manner" is often applied when discussing the job performance of a veterinarian. Achieving a great, comfortable bedside manner includes the stress-free handling of the patient. Fear Free provides information about the best de-stressing practices in easy-to-access modules. Not only will graduating students continue to see the benefits of Fear Free techniques in their professional careers, but they can also extend the impact to the team they work with.

"Sustaining the behavioral and emotional wellbeing of pets through decreasing their fear, stress, and anxiety should, in turn, do the same for the veterinarian and the entire veterinary team," Eleanor M. Green, DVM, DACVIM, DABVP, Former Dean of Veterinary Medicine, Texas A&M University, and Senior Advisor and Consultant to the Animal Policy Group said. "Veterinary students and graduate veterinarians should find greater fulfillment as they witness and experience the positive benefits of Fear Free. They will likely find more joy in practicing veterinary medicine when their patients, clients, and veterinary team are cared for with a Fear Free approach. They will also be more successful as veterinary professionals. Fear Free gives tangible meaning to the Veterinarian's Oath."

Teaching a skill in veterinary school that not only benefits the bedside manner with pets but also benefits the workplace relationships with the veterinary healthcare team is a win-win for all involved. People enter the veterinary profession with the desire to prevent or relieve animal pain and suffering. Fear Free helps the veterinary professional achieve that while providing additional benefits to all the humans involved with the care of the patient at the same time.

There are many reasons why veterinary schools have implemented Fear Free in the curriculum, be it ease of availability, low cost, ability to customize to the curricular structure, etc. However, there are times when strategic plans and return on investment (ROI) numbers are not as important. "Fear Free just makes sense," James W. Lloyd, DVM, PhD, Senior Consultant Animal Health Economics, LLC and Dean Emeritus College of Veterinary Medicine at the University of Florida said. "It aligns perfectly with our passion for enhancing both the wellbeing of animals and the benefits that accrue to a stress-free human-animal bond. What's more, there are enormous benefits associated with this approach to practice...benefits to the quality of medicine, the welfare of the animals, the satisfaction of clients, and the wellness of the entire healthcare team."

# Fear Free Ecosystem

To successfully affect the emotional wellbeing of pets, the entire ecosystem of a pet needs to have access to Fear Free resources and education. The following infographic shows the growth of the Fear Free ecosystem (Fig. 1).

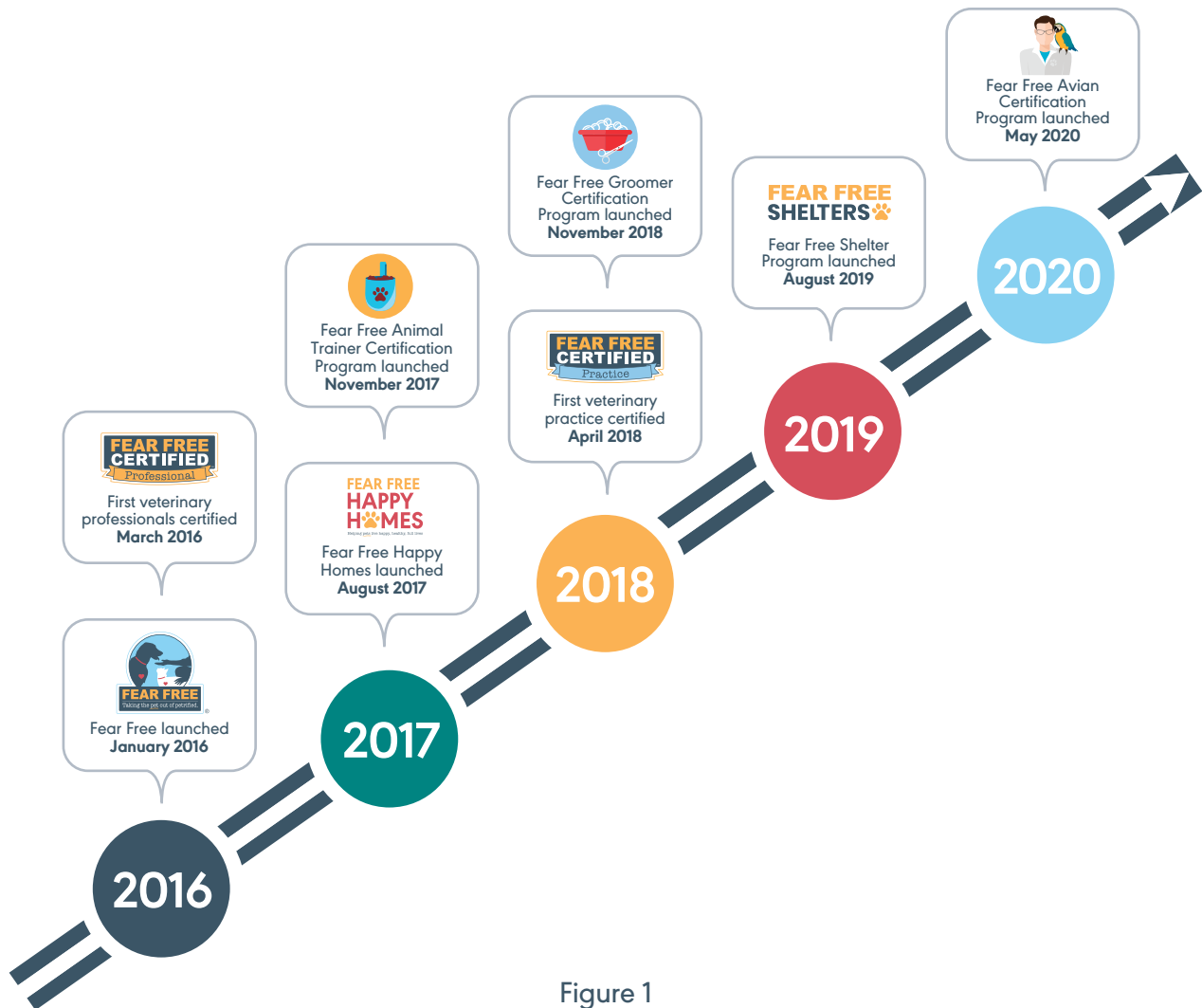


Figure 1



# Methodology

Just like the previous year, Fear Free partnered with VetSuccess, a data and analytics company specializing in the delivery of data-driven practice management solutions, including monthly practice performance reports, dashboards, and automated marketing solutions, to run the data analysis and assist with the development of this study.

Transaction data was extracted from the practice management software of 25 veterinary practices in the US and Canada to conduct this analysis. All Fear Free Certified Practices were encouraged to participate.

The Practice Certification program was launched in April 2018. In order to achieve an appropriate time period (2 years) for a meaningful study, the inflection point (day 0) to define the “before” period was determined to be nine months before a practice applied for Practice Certification. The reason being that, in order for a practice to become certified successfully, it is necessary to have implemented and practiced Fear Free for at least nine months prior to application. The “before” period is thus 12 months prior to day 0, the year one (Y1) period is 12 months after day 0, and the year two (Y2) period is 12 months after that.

It is important to note that the data from this study does not build on last year’s results (see “The Positive Impact of Fear Free Certification in Veterinary Practices”). Rather, each year’s study needs to be analyzed independently, as the addition of new practices (as well as the removal of some due to inability to access their data) creates new data points for Y1 in the study. (Last year’s study had a “before” and “after” period; this year's study has a before, a Y1 period, and a Y2 period).

The benchmark analysis was limited to 22 practices, as three of the practices did not have enough tenure as a certified practice to use their 2019 data.

# Demographics of Survey Participants

Fear Free techniques can be used for many species since key concepts and tools, such as the Emotional Medical Record (EMR) and FAS Scale, are the same or very similar. The survey respondents primarily treat canine and feline patients (Fig. 2).

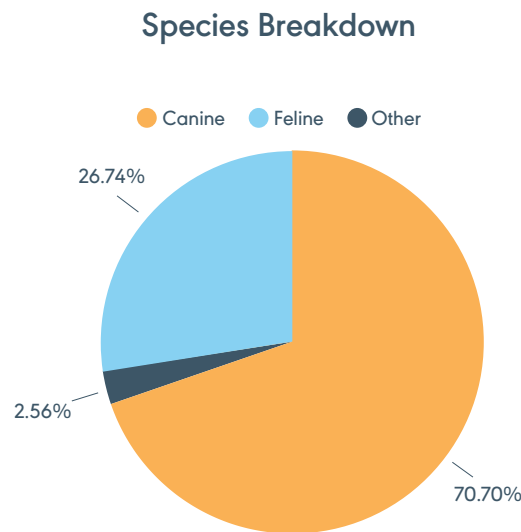


Figure 2

The location of the practice as compared to a rural or urban area is noted in Figure 3.

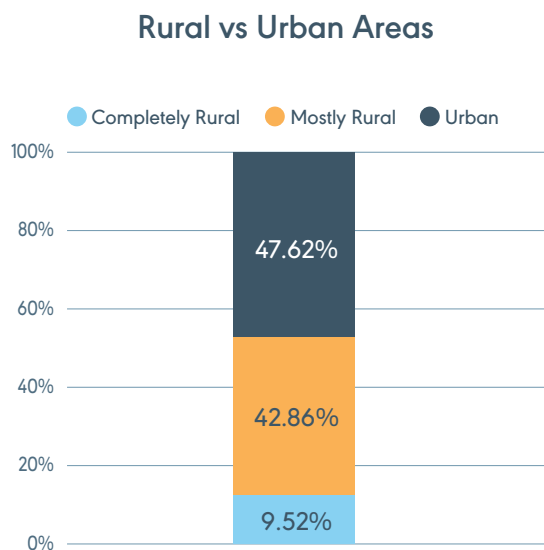


Figure 3

This breakdown is different when compared to the first study due to a change in the practices participating in the study. Namely, two urban practices did not participate, and the seven new practices were a mix of urban and mostly rural, which explains the decrease in urban (62.5% to 47.62%) and the increase in mostly rural practices (25% to 42.86%) in this set of participating practices.

However, the key point is that Fear Free is not a trend embraced only by urbanites seeking the next fad. Fear Free is an initiative embraced by all veterinary professionals seeking to improve the lives of their patients, clients, and teams. Fear Free works just as great in rural Minnesota as it does in New York City because FAS knows no boundaries, be it rural/urban or species of pet.

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*I applaud Fear Free for continuing to measure financial and operational outcomes. As usual, good medicine is good business. The evidence shows Fear Free doesn't cost, it pays.*  
– Fritz Wood, Founder of H. F. Wood Consulting

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# The Effects of Fear Free: Breaking Down the Data

The first study provided data proving that Fear Free did improve key metrics both by a quantitative analysis of before and after implementation periods as well as a comparative look against industry benchmarks. However, due to the relative infancy of the Fear Free program, there was not any way to predict long-term financial impacts. This second study provides the means to trend key data points on an annual basis, which not only gives currently certified practices the ability to benchmark themselves against other certified practices but also enables newly certified practices the means to compare their first-year data with those who have already gone through the process.

The Fear Free community hopes to have an open dialogue whereby a newly certified practice can call more “seasoned” certified practices for advice on how to hit financial improvements documented in these ongoing annual reports.

## Patient Visits & Revenue Per Patient

For a practice implementing Fear Free techniques, the expectation of increasing patient numbers is real, especially regarding feline patients. For the extensive processes of obtaining certification and implementing different procedures, the payoff is an increase in the overall number of patients at the end of Y1 and Y2 and strong retention of feline patients even at the end of Y2 (Fig. 4).

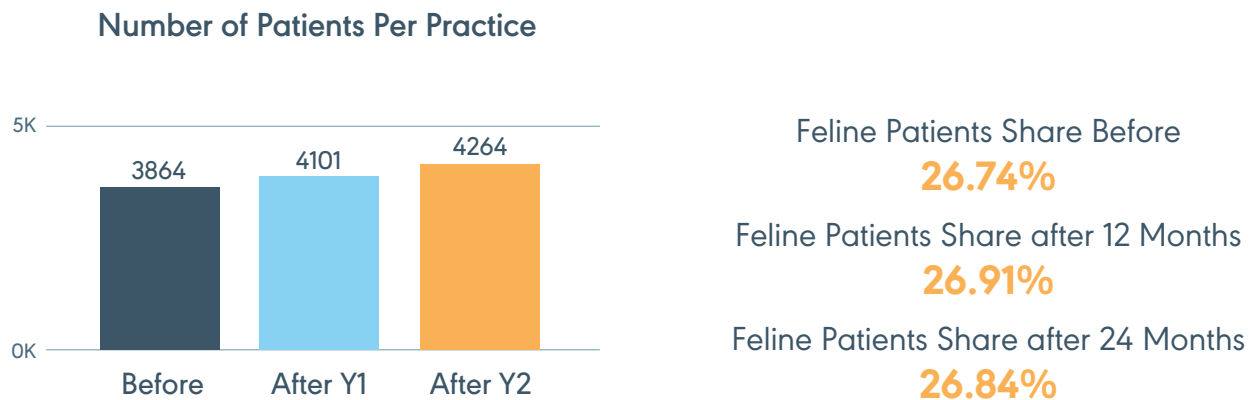


Figure 4

Additionally, feline invoice value and feline revenue per patient, as well as total revenue per patient, continue to increase after Y1 and Y2, harkening back to the growth in the number of patients per practice after implementing Fear Free. Denise Tumblin, CPA, President of WTA Veterinary Consultants and founder of the Well-Managed Practice® Benchmarks Study, said: “Practices have a strong opportunity to develop feline-focused marketing and promotion of their feline services to continue to educate their clients and their community about the benefits of Fear Free for kitties to encourage more feline visits and continue to grow the practice.”

The results show that Fear Free does not deter growth but enhances it. Clients value the Fear Free effort, and along with the increasing number of patients per practice comes an increase in the number of exams per patient and the percentage of patients with exam visits (Fig. 5).

### Total Visits vs Exam Visits

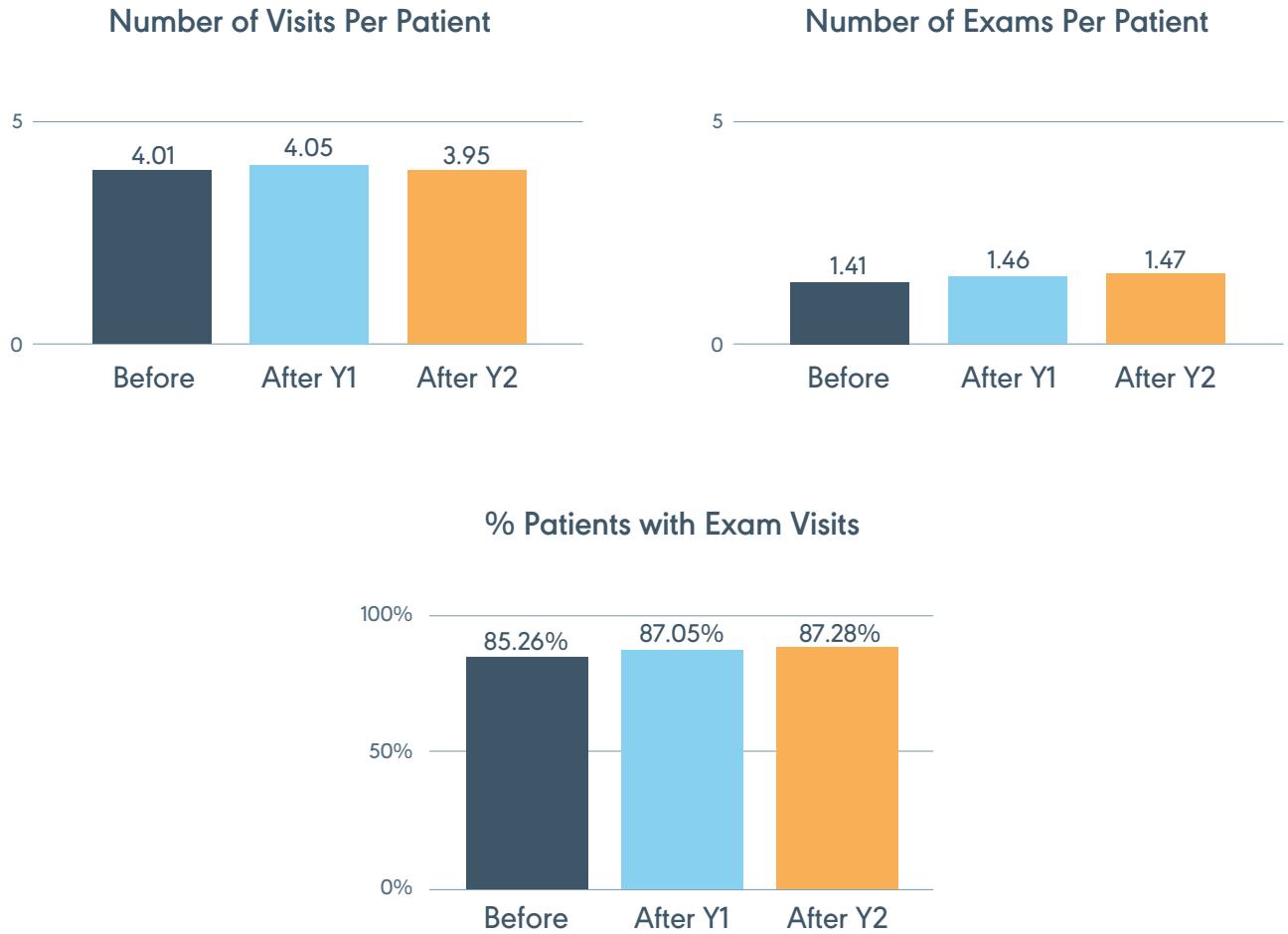


Figure 5

Of particular interest is the feline patients who have historically demonstrated low numbers for patient visits. (For example, the VHMA Insiders' Insights for 2018 and 2019 reported only a few months with positive growth in feline patient visits.<sup>2</sup>) For the Fear Free Certified Practice, feline patients show an increase in progress exams each year following the implementation of Fear Free (Fig. 6). The better way to improve feline visits is not by inundating a client with reminders or enticing clients with discounts but rather reducing FAS in the cat.

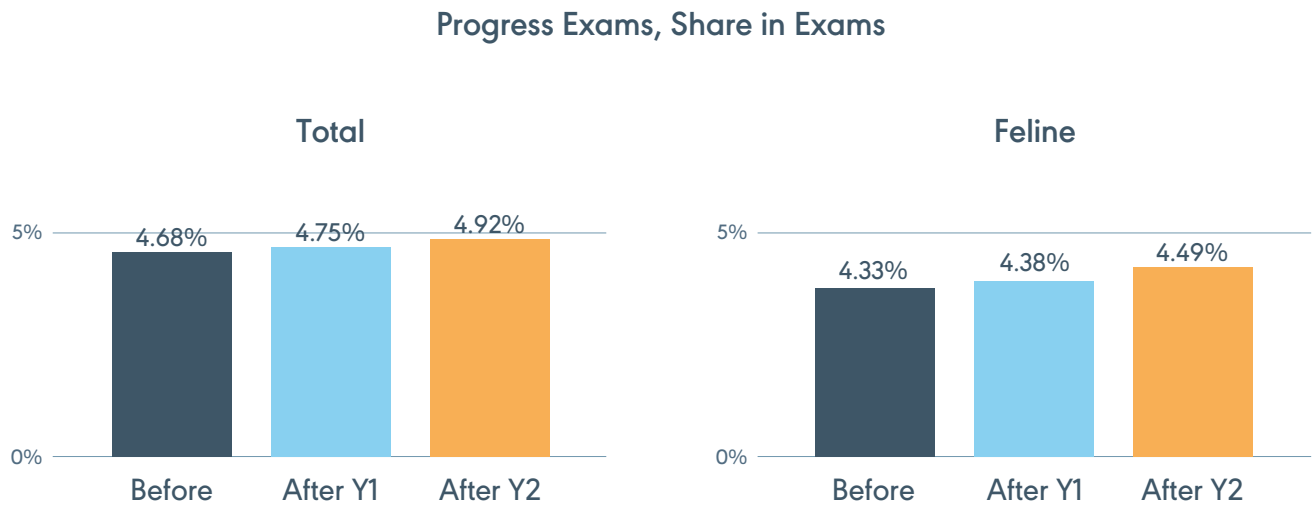


Figure 6

Perhaps even more encouraging is the fact that Fear Free Certified Practices continue to outperform benchmark practices in patient growth and patient visit numbers (Fig. 7 and 8).

Patients YoY Change

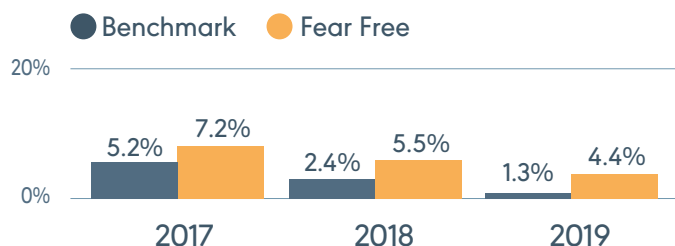


Figure 7

Patient Visits YoY Change

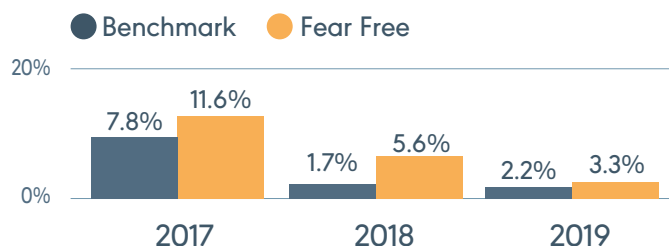


Figure 8

Even though recent years have shown slower or declining patient growth and visits, Fear Free Certified Practices had a less severe decline in the growth of patients and patient visits during the same time period. A slightly higher increase in year-over-year (YoY) patients and patient visits compared to benchmarks can provide some evidence to suggest that pet owners are more inclined to visit a Fear Free Certified Practice. Practices can take advantage of this increase in trust in the team and desire to bring the pet back by scheduling the next appointment before the client walks out the door.

“Forward booking appointments is key in changing the visit trajectory back to an upward trend,” according to Denise Tumblin, CPA. “Forward booking is good for the patient because the necessary care is more likely to happen. Forward booking is also a huge convenience for the client, as they don’t have to remember to schedule the appointment because it’s done before they leave the practice. And, finally, forward booking is good for the practice. Doctors and team members want their patients to receive all of the care they need, and it helps the bottom line. Truly a win-win for all.”

### Pet Owner Value & Compliance

If a client is wrestling with a pet suffering from FAS, the only thing on that client’s mind is getting that pet out of the exam room and on his/her way home. Nail trims? Blood draw for tests? No way. But when the trip to the vet does not include FAS in the pet, the client is less stressed and able to focus on discussing what the pet needs to stay healthy. Trim the nails? Run some bloodwork? Sure, just work that Fear Free “magic” so the pet remains calm. The data in Figure 9 shows that the first year of Fear Free is not a quirk or an anomaly as Y2 keeps going with continued improvement. The veterinary healthcare team is not simply smearing peanut butter on the wall; they are creating an environment where the client can relax and have an in-depth discussion about vaccines, bloodwork, surgery, and more.



Figure 9



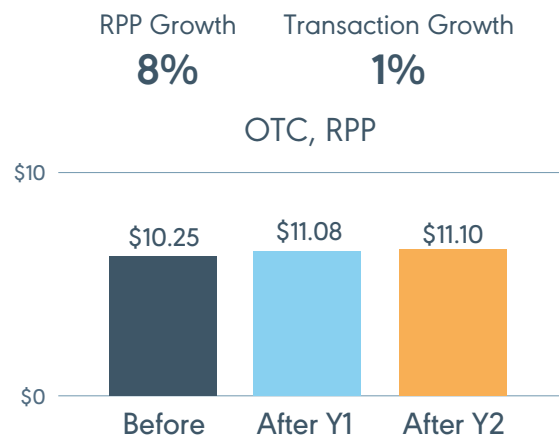
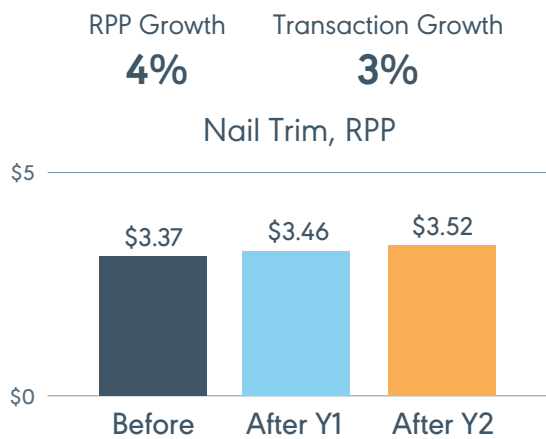
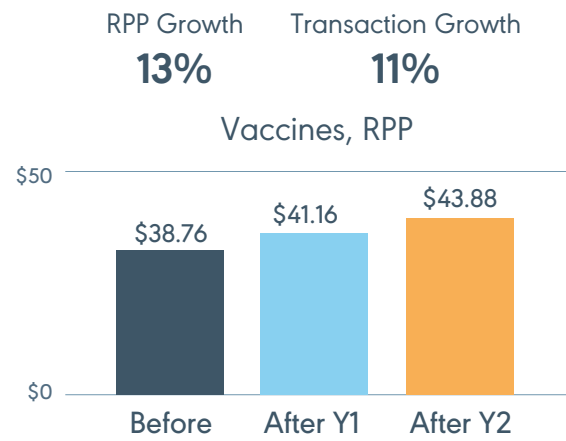
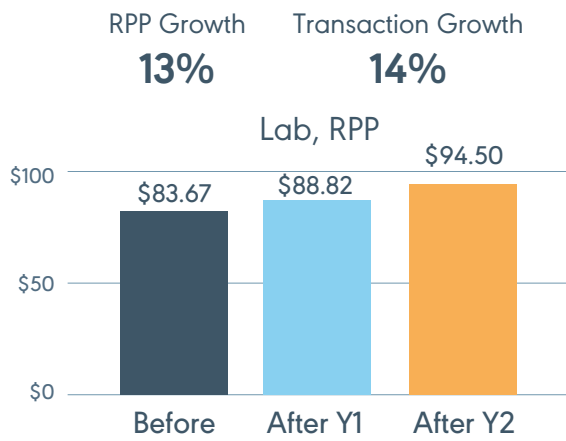


Figure 9

Any practice contemplating starting Fear Free should analyze where they currently are in regards to providing these services and then calculate the anticipated growth after Y1 and Y2 to provide the management team with targets. For example, lab transactions per patient (Transaction Growth) increased by 14% after Y2. As more and more practices become certified and add their data for before Y1, after Y1, and after Y2, a sharper picture of financial changes will emerge.

## Veterinary Revenue

Practicing Fear Free techniques will not cut into profits nor will it reduce revenue. Quite the opposite is true. By enhancing the interaction between the team and the pet, the client is now able to get involved in discussing the pet's health and medical needs. A 3-4% increase in practice revenue and invoice value (Fig. 10 and 11) shows that Fear Free Certified Practices are not losing revenue, any price increases for the year are maintained, and revenue may even increase beyond the basic price increase.

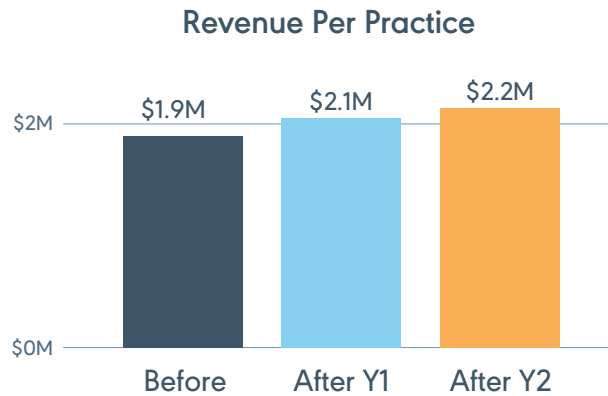


Figure 10

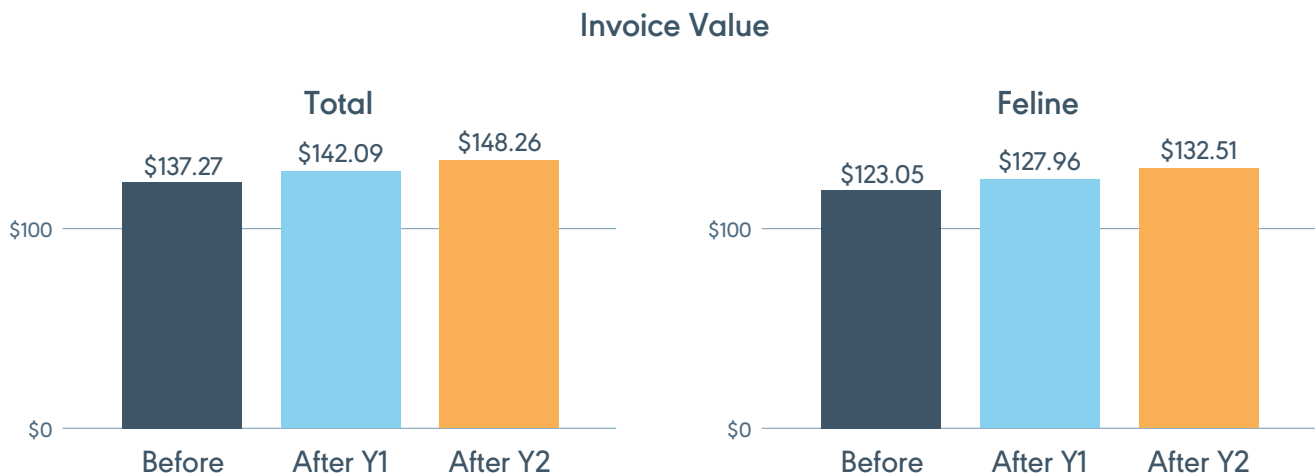
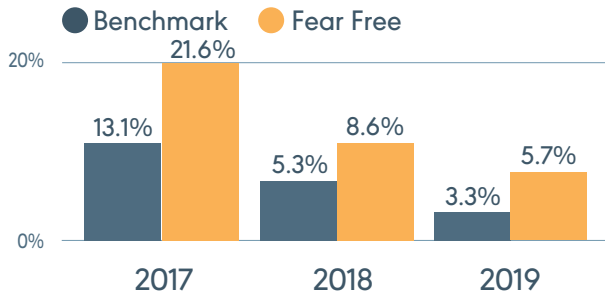


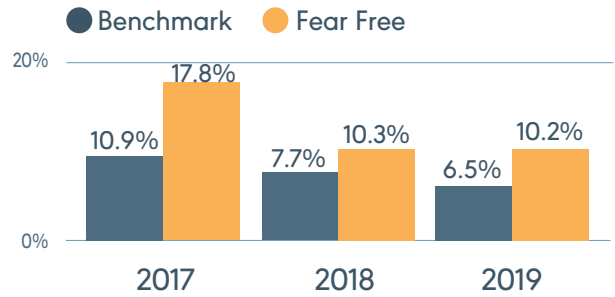
Figure 11

Compared to benchmark practices (Fig. 12), Fear Free Certified Practices outperform in every category. Calm, relaxed pets allow better dialogue between the veterinary healthcare team and the clients. Better dialogue allows for education and discussion, which may lead to compliance with recommendations.

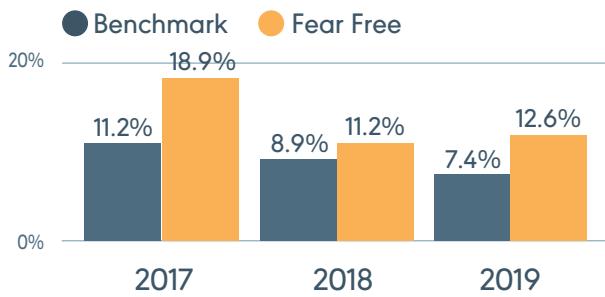
Revenue Drug & Medication YoY Change



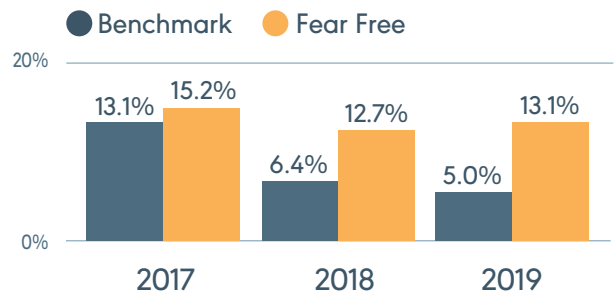
Revenue Exams YoY Change



Revenue Lab YoY Change



Revenue Vaccines YoY Change



Revenue YoY Change

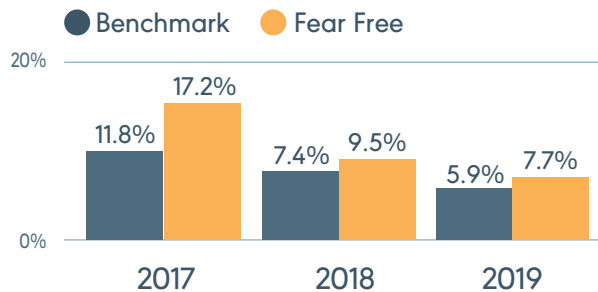


Figure 12

While it is important to track revenue as a percentage of income, tracking YoY change is vitally important when implementing a culture-changing program such as Fear Free. It is not enough to know that lab or vaccine percentage of revenue hits benchmarks (such as those in AAHA's Financial and Productivity Pulsepoints) but rather to also know how much of a change has occurred since implementing Fear Free. As noted in Figure 12, Fear Free Certified Practices notice a greater positive change YoY than benchmark practices.

For a practice suffering from a low or stagnant percentage of revenue, exploring the impact of Fear Free is worthwhile, given these results of higher YoY revenue changes experienced by Fear Free Certified Practices. Perhaps the practice could improve the percentage of revenue for a service such as lab if the exam room environment improved (with less FAS), allowing clients to discuss and comply with medical recommendations. Perhaps puppies and kittens would complete their initial vaccine series if the clients did not feel like they were in a battle to get the pet to the vet.

All too often, the lack of client compliance is blamed on the fees that are charged, the lack of appointment times, or the ignorance of clients. Maybe clients just don't want to say they hate wrestling the pet or watching the pet get muzzled or scruffed. Recall the Bayer study where 58.2% of cat owners and 37.5% of dog owners said their "pet hates going to the vet." Were those owners struggling to put their finger on why they themselves hate going to the vet? Maybe the reality can be found in the other survey response: "just thinking about it is stressful."<sup>3</sup> Perhaps clients give the veterinary healthcare team an excuse the client feels is "acceptable" (such as money or time) because they can't explain their gut feeling that something just isn't right and the visit is too stressful for them and their pet.

Fear Free may be able to eliminate some of those client responses that the "pet hates going to the vet" or "just thinking about it is stressful." The 2020 Fear Free study shows it can be well worth the effort to implement a change.

# Summation/Closing Key Points

For the second year in a row, the data is showing that Fear Free initiatives make a difference in the lives of pets as well as the success of the veterinary practice. In addition to the financial study conducted by VetSuccess, a survey of Fear Free Certified Professionals was completed in 2019. Of the 1,496 respondents (an increase from the 960 respondents in the 2018 survey)<sup>4</sup>:

- **98%** agree that patient care has improved since implementing Fear Free (up from 96% in 2018)
- **91%** say that the practice enjoys a more positive image (up from 90% in 2018)
- **82%** have noticed an increase in gross revenue (up from 80% in 2018)
- **86%** have noticed an increase in client visits (up from 82% in 2018)
- **91%** have reported an increase in workplace safety (equal percentage to 2018)
- **96%** would recommend Fear Free to a fellow professional (equal percentage from 2018)

If your practice has not started Fear Free, take some time to compare your practice data with those of the Fear Free practices in this report. “Let your clients blow your treats budget sky high! Incremental Fear Free costs are easily accommodated via a slightly higher exam fee,” said Fritz Wood, Founder of H. F. Wood Consulting. Perhaps there are some metrics that could use a boost, and Fear Free may just be “what the doctor ordered” to help ailing patient care or client service metrics.

For those who have started implementing Fear Free, consider the following action steps:

- Monitor your metrics and track what is changing
- Re-focus Fear Free efforts
- Develop feline-focused marketing and client education
- Forward book appointments whenever possible

Implementing Fear Free techniques is not a “one-and-done” type of effort. It builds on itself, evolving as the team learns more skills, the pets respond and become more comfortable, and the clients notice and value the change. Those practices that have been successful with implementation have found that the tools provided by Fear Free are a tremendous help. Tools such as the Pre-Visit Questionnaire (PVQ) and the EMR help the team stay aware and consistent in the techniques that work for each individual pet. Fear Free does indeed make a positive difference when applied regularly and consistently.



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*Reducing fear will improve both the welfare and life of your pet.*  
– Temple Grandin, PhD



# References

<sup>1</sup>Retrieved from fearfreepets.com. September 30, 2020.

<sup>2</sup>"VHMA's Insiders' Insight Benchmark Reports." Veterinary Hospital Managers Association. 2018-2019.

<sup>3</sup>John O. Volk, BS; Karen E. Felsted, MS, DVM; James G. Thomas, PhD; Colin W. Siren, BA. "Executive Summary of the Bayer Veterinary Care Usage Study." Journal of the American Veterinary Medical Association 238, no. 10 (May 2011): 1275-1282.

<sup>4</sup>Fear Free, LLC. "Fear Free Certified Professionals Survey 2019." Questionnaire. December 4, 2019.

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We would like to thank VetSuccess for gathering and providing the data for this study.