Vet JBPs
Joint Business Plans
Updated June 15, 2022

Salesforce

JBP Salesforce Enchancements
effective 06/06/2022

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For: Vet City Managers & Vet District Managers

ROYAL CANIN
a division of Mars Petcare

Eukanuba   ROYAL CANIN

Introduction

You've identified your clinic(s), and you know that they want to recommend our products. It's time to use that information and build your Joint Business Plan (JBP) to help them build their brand and recommend ours with confidence that we are there as a partner.

Your business plan represents your long term or short term goals and stategies for meeting those goals. Your long-term or short-term goals can be what you set, quarterly or for the year, it's your JBP.

You can add files to the JBP, add stakeholders that you are working with to track the progression of the JBP. The goal is to guide the clinic to success with Royal Canin products.

Beneficial tips

Call to Action

→ **Vet District Managers**

While there are currently no KPI's in 2022 for Vet District Managers to complete JBPs, please build the discipline with the expectation that a KPI goal will set for 2023.

- Practice with completing **2** JBPs before year end, will get you ready for 2023.

→ **Vet City Managers**

Your KPIs have been set for 2022:
- Quarter 1 - **10** JBPs
- Quarter 2 - **20** JBPs
- Quarter 3 - Leadership will roll these out
- Quarter 4 - Leadership will roll these out

✓ **June 15th Update:**

Any JBPs created prior to June 6th, **will not** have to be re-entered under the new JBP format. You will still get credit for the JBPs completed prior to June 6th.

Objectives

Following these 6 basics steps will assure your JBP is successful.

1 — <u>Plan</u>- Identify your targets for JBP planning.

4 — <u>Focus</u> - on b**uilding back trust, OLP**, and n**utrition.**

2 — <u>Build</u> - the JBP Template in Salesforce.

5 — <u>Support</u> - and detail your steps for effectively managing your JBP.

3 — <u>Set up</u> - a meeting with your Doctors, Practice Managers, and Business Managers.

6 — <u>Track</u> - Regularly monitor your progress and keep your JBP updated in Salesforce.

Plan · Build · Set up · Focus · Support · Track

Salesforce Planning

To create a Joint Business Plan (JBP)

1. Log in to Salesforce.com using the **Custom Domain**.
2. Navigate to the clinic account page that you wish to create the JBP.
3. Click the **Joint Business Plan** button.

4. Enter the **opportunity name, stage**, and **close date**.
   • *Format for Opportunity name: Year + JBP + Objective (2022 JBP Build Back Trust).*
5. Enter additional information as *required*.
6. Click **save**.

Planning Fields

Clinic Overview Questions you might ask:

1. Target Quarter - which quarter should the target be completed in?
2. High level overview and High Level Challenges
   - provide clear details on the state of the clinic business
   - provide clear details on the struggles or challenges the clinic is having or you are having with the clinic.

High Level Overview

High Level Challenges

Clinic Overview Questions you might ask:

1. What are the goals of the clinic?
2. What's the clinic's 1, 3, & 5-year plan for the business?
3. What are the needs of the clinic?
4. What does success look like for the clinic?
5. What are some things that the clinic needs to stop doing?
6. What are some things that the clinic would like to start doing?

Build Back Trust

Complete the remaining fields for your JBP.

1. **Current State - Build Back Trust**

Build Back Trust

Current State - Build Back Trust

Challenges - Build Back Trust

Results Achieved - Build Back Trust

SMART Strategy - Build Back Trust

Clinic Questions you might ask:

1. How much inventory on hand; what is their weekly/monthly/yearly spend on nutrition inventory? Reduce inventory footprint? Create new exam room from that freed space and capital?

Text Fields to be completed:

1. **Current State** -
   - what are the goals of the clinic?
   - what are the needs of the clinic?
   - what does success look like for the clinic?

2. What **Challenges**?
   - what does the clinic need to start doing?
   - what does the clinic need to stop doing?
   - what do we need to do for the clinic?
   - What roadblocks are preventing this goal to happen?
      - example - not enough staff, not enough room in clnic for on hand inventory, doesn't want to deal with technology with OLP.
      - example - Supply constraints/Ongoing order fulfillment issues. Pricing constraints, lacks knowledge on healthy diets, recommends competitors.

3. **Results Achieved**
   - example - able to get the doctor back on board with Royal Canin recommendations and stock smaller bags that the clients are requesting.

4. **SMART Strategy**
   - Outline your **SMART*** Strategy to Build Back Trust with the clinic.
      * Specific, Measureable, Attainable, Relative, and Timebound.

   30/60/90: in your answers you can state 30 days/60 days/90 days to make a "SMART" callout

OLP – Pharmacy

Complete the remaining fields for your JBP.

1. **OLP Fields -** Online Pharmacy

> OLP

Current State - OLP	Challenges - OLP

Results Achieved - OLP	SMART Strategy - OLP

Clinic Questions you might ask:

1. What is the clinic's strategy to transition clients already coming in to get diets to their OLP
2. How will the clinic offer clients new prescriptions?
3. Does the clinic want to go 100% OLP? If so, what is the time frame for this transition?

Text Fields to be completed:

1. **Current State** -
   - what are the goals of the clinic?
   - what are the needs of the clinic?
   - what does success look like for the clinic?
      - example - Currently Clinic has (20 bags, 3 diets on hand in clinic). Spend around $500/monthly on inventory, and inventory is currently in back room or lobby.

2. What **Challenges**?
   - what does the clinic need to start doing?
   - what does the clinic need to stop doing?
   - what do we need to do for the clinic?
   - What roadblocks are preventing this goal to happen?
      - example - not enough staff, not enough room in clnic for on hand inventory, doesn't want to deal with technology with OLP.
      - example - Currently the Dr likes to have product on hand for top diets he/she prescribes.

3. **Results Achieved**
   - example- Able to reduce inventory in clinic after 60 days of slowly reducing on hands inventory. Dr has room for more chairs in lobby for patient, office supplies in back area.

4. **SMART Strategy**
   - Outline your **SMART*** Strategy to Build Back Trust with the clinic.
      - * Specific, Measureable, Attainable, Relative, and Timebound.

   30/60/90: in your answers you can state 30 days/60 days/90 days to make a "SMART" callout

Nutrition

Complete the remaining fields for your JBP.

1. **Nutrition Fields**

Nutrition

Current State - Nutrition

Challenges - Nutrition

Results Achieved - Nutrition

SMART Strategy - Nutrition

Clinic Questions you might ask:

1. what's the strategy to discuss healthy pet nutriton with clients?
2. do they need staff training on healthy pet?

Text Fields to be completed:

1. **Current State** -
   - what are the goals of the clinic?
   - what are the needs of the clinic?
   - what does success look like for the clinic?
     - example - only trained on GI and Derm diets.

2. What **Challenges**?
   - what does the clinic need to start doing?
   - what does the clinic need to stop doing?
   - what do we need to do for the clinic?
   - What roadblocks are preventing this goal to happen?
     - example - not enough staff, not enough room in clnic for on hand inventory, doesn't want to deal with technology with OLP.
     - example - Limited staff so limited time to conduct training with staff available at same time due to patient to staff ratio.

3. **Results Achieved**
   - example - Since Q2, the staff at the clinic has been trained on Puppy/Kitten Healthy Pet diets; Puppy diets and Kitten diets are up X% vs Q1 (X% vs PY) (Utilize Einstein.

4. **SMART Strategy**
   - Outline your **SMART*** Strategy to Build Back Trust with the clinic.
     * Specific, Measureable, Attainable, Relative, and Timebound.

Results Achieved
   - example - Conduct Trainings every 6 weeks on Fridays during lunch.

   30/60/90: in your answers you can state 30 days/60 days/90 days to make a "SMART" callout

Tracking your Path

The Salesforce **Path** is a visualization tool, used on opportunities, to help guide you along a path to a final destination. There are 5 key options that are intended to guide you to **success** with your Joint Business Plan.

This field is used when your JBP Target has been identified and created, this is the starting point of the path.

This field is used when your JBP Target **is not** progressing according to the agreed upon plan. *The JBP should not live in the stalled path location for more than 90 days.*

This field is used when your JBP Target **is** progressing according to the agreed upon plan.

This field is used when your JBP Target has made their initial meeting and are on board with the business plan.

This field is used when the JBP Target plan has reached completion or no longer valid due to shift in focus or no longer a target. DM will enter outcome in the results achieved field with success metrics or reason for JBP incomplete. JBPs should be closed at the end of the year, and a new JBP created in the new year if you are continuing a JBP on the same topic.

Do's and Don'ts

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- Vet DMs complete a minimum of 2 JBP plans by end of 2022 to prepare for 2023

- Vet City Managers complete your allocated KPI targets

- Create SMART Plans

- Implement tools to help build your partnerships

- Keep Exploring through discovery

- Document everything in Salesforce

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- Don't wait for 2023 to create JBPs. Create small steps in 2022 to plan for a better 2023.

- Hesitate to ask your peers for help

- DO NOT Give Up

- Forget discovery to help drive trust and recommendations

- Forget to log everything in Salesforce

Questions? Reach out to your Line Manager.

June 2022