

VMX
2025
VETERINARY MEETING & EXPO

Festival of the HeARTS



Presented By:

NAVCH
YOUR VETERINARY COMMUNITY

JANUARY 25-29

ORLANDO, FLORIDA

NAVCOM.COM

Conflict of Interest Disclosure:

This session is sponsored by IDEXX

Tools to streamline client communication

Eric D. Garcia

About Eric D. Garcia

Management Team at Large Practice in Tampa, FL with Feline Exclusive Sister Practice

Former VP of Veterinary Exclusive Web Marketing Firm

IT & Digital Strategist | Founder of **Simply Done Tech Solutions,**



About Eric D. Garcia

5

VMX Speaker of the Year for
Practice Management



International Speaker: USA,
Canada, Netherlands, Turkey,
Thailand, Philippines, Austria,
Singapore, Brazil, Peru, Croatia,
South Africa, Chile

Published Author:

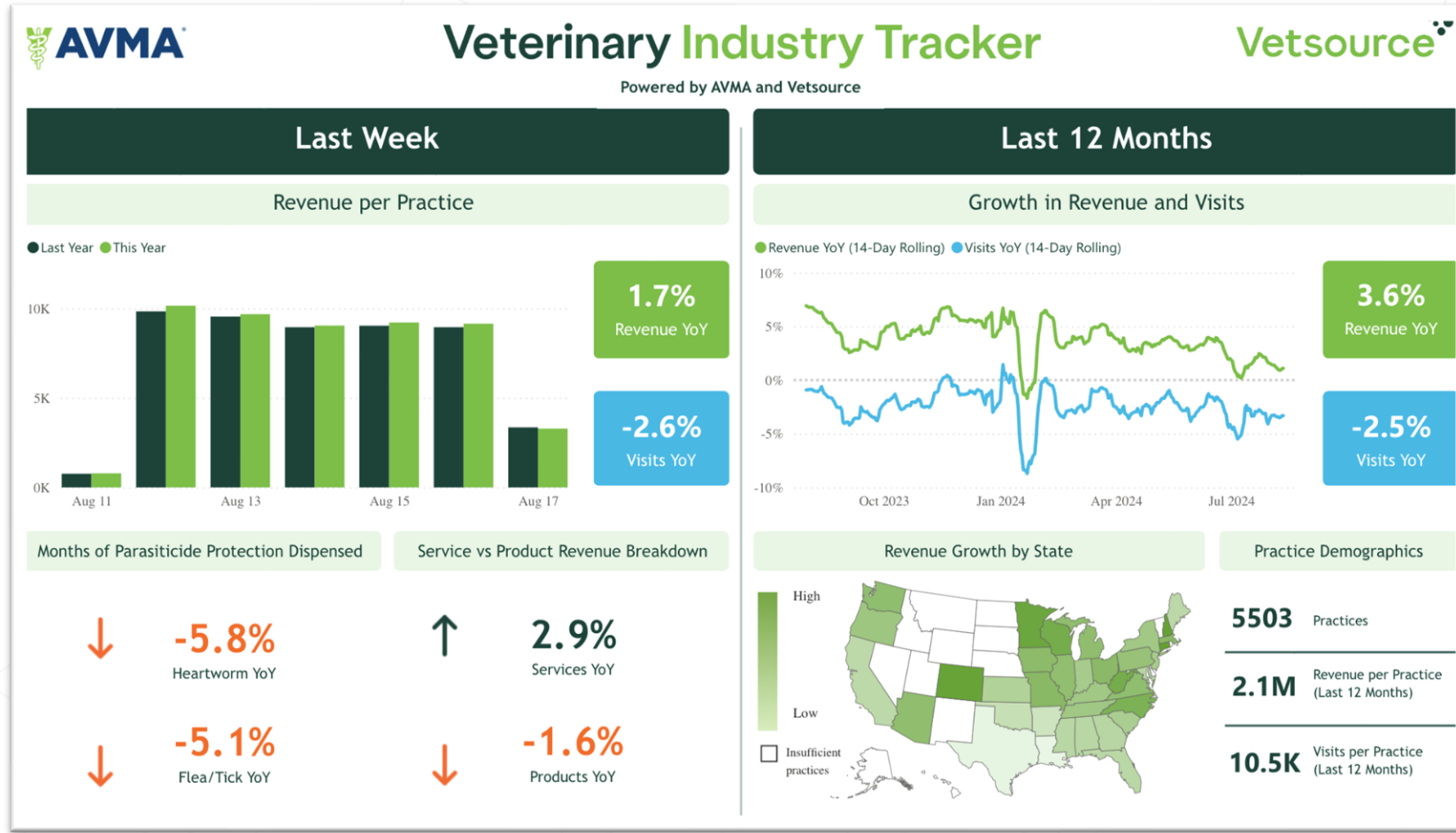
- Former Marketing Columnist for Today's Veterinary Business
- 15+ Chapters in the the 5-Minute Veterinary Practice Management Consult, AAHA Trends Magazine, Brief Media, Veterinary Practice News, DVM360, and more

ERIC D. GARCIA
@EricGarciaFL

State of the Industry

As of X | National

7



X%
Revenue YoY
(12 months)

X%
Visits YoY
(12 months)

On the positive side, our intentions look favorable. Two-thirds polled expressed interest in adopting a shelter pet. Small dogs are the most attractive, followed by medium dogs, cats, and large dogs. Gen Zs and Millennials expressed above-average intentions.

On the negative side, **nearly half** say the cost of ownership is a challenge to ownership. **84%** say the cost of veterinary care is the most expensive part. When coupled with a recent Brakke report, the picture is concerning. We've reported that the number of pet visits in clinics is flat to slightly declining. Other major reports confirm our findings. Veterinarians are using price to drive up revenues.



Jeff
Santosuosso

Resource: [prnewswire](#)

Resource: [hillspet.pdf](#)

Concerns about the cost of pet ownership are the top barrier to adoption

84%



of respondents said veterinary care is the most expensive part of owning a pet

<\$75K



Owning a pet is less accessible for people who earn less than \$75,000 per year.



For Most Practices, Demand Returns To Pre-pandemic Levels

https://www.avma.org/news/most-practices-demand-returns-pre-pandemic-levels#.ZCBI_FCHICI.linkedin

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MEMORANDUM

TO: VMG Members

FROM: Terry O'Neil, CPA, CVA
Beth Scott, CPA
Logan Cobb
KSM Datalink Team

DATE: 10/14/24

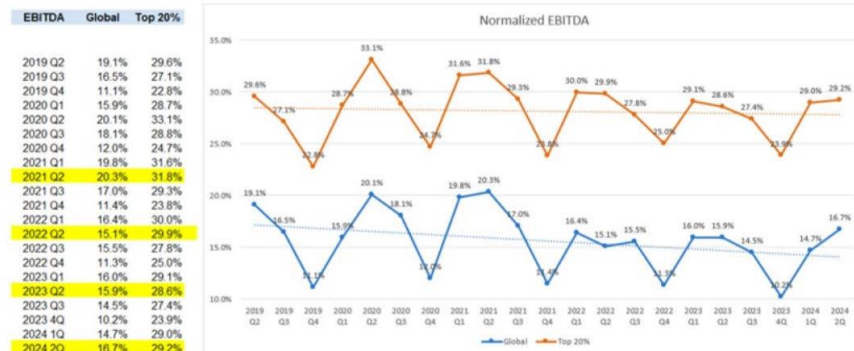
RE: Summary of Q 2024 VMG DATALINK Observations

During 2Q 2024, revenue growth was 6% globally vs. 10% for same period last year. Global invoices increased by 1.3%, which is a slight increase over same period 2023. Globally, the average invoice growth the last two years is 2.7%, which is less than half of the growth of 2022, while the top 20% most-profitable veterinary hospitals have seen invoice count growth of only 0.9%.

The last few years have been unprecedented, challenging, and tested all of us, and we believe the coming months will be equally if not more challenging. The challenges to families are well documented and will more than likely have an impact on disposable income available to pay for pet care needs. We anticipate that consumers will continue to have limited disposable income to spend on veterinary services due to the restart of student loan repayments, slowing wage growth, and job eliminations. Our message to the veterinary industry in 2024 will continue to be "back to the basics," with a focus on customer satisfaction, efficiencies, and staff wellbeing. Now is the time for hospital owners to embrace opportunities to use technology to enhance the customer experience and to find efficiencies.

For the past four years, hospitals have been able to increase prices aggressively without much pushback due to demand. Many hospitals tell us the price increases are starting to affect client acceptance of DVM recommendations. The effect inflation had on the economy may be starting to impact the veterinary industry, which makes efficiencies and customer/employee satisfaction extremely important in the near future. When reviewing pricing adjustments, be sure to consider inflation. Below is a chart for reference purposes. We believe pricing elasticity is starting to catch up with pet owners, which might be the possible cause in the leveling off of client visits (if not related to capacity issues).

Feedback from hospitals indicate success in recruiting new DVMs and staff. We continue to endorse options such as profit sharing, equity appreciation, retention bonuses, and student loan assistance programs to compete with corporate consolidators. Associate DVMs continue to share with us that the No. 1 thing they are seeking when considering a new opportunity is mentoring and a positive workplace culture. Please be sure to establish a robust and detailed plan that can be shared while interviewing to demonstrate the hospital's commitment to mentoring. We advise that you market mentoring programs in job ads as well as any special bonus programs that are attractive to potential job

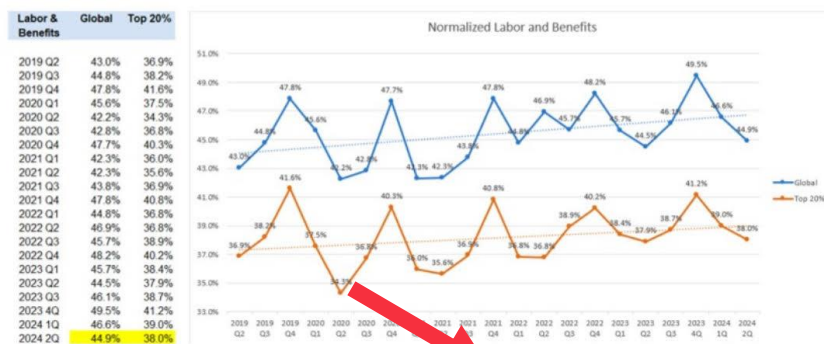


EBITDA - Owner compensation normalized to 20% of owner production, and the lessor of the management wages paid, or 3% of revenue
Rent normalized to equal 6% of revenue

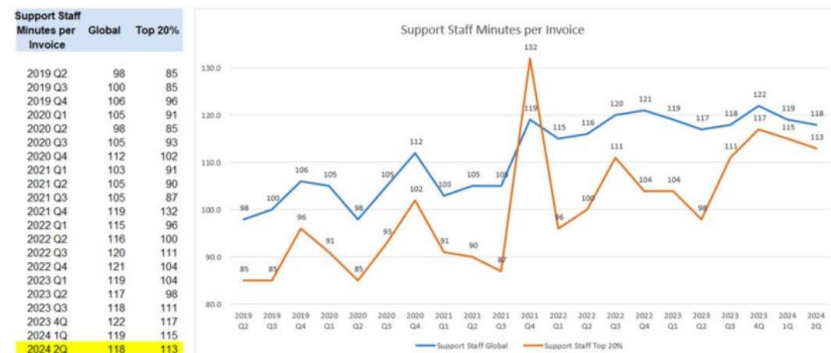
A few lessons learned over the past couple of years and some thoughts regarding the future (some repeated messages but are still relevant):

1. Stay healthy and make sure you take care of yourself and the staff.
2. Things are never as good as they may appear, but they are not as bad as they appear either.
3. We cannot overreact or underreact to performance. One quarter/year or year does not define a business's success, but it must be monitored to identify what the root cause is and what may be done to improve.
4. Please stay humble and continue to mentor and care for yourself, your staff, and your patients.
5. Technology options have to be embraced (i.e., AI), and hospitals should consider how they can positively impact the hospital and be used to improve operations both internally and externally. Change is good!
6. Many hospitals are starting to see open appointment slots. Now may be the time to consider launching a new campaign to attract new clients as well as reviewing past-due reminders and re-engaging any pets that may have lapsed. Our suggestion is to schedule any new appointments during slower times if incentives are attached to a promotion.
7. Review and compare DVM productivity and related revenue percentages amongst associate DVMs to ensure hospital Standards of Care (SOC) are aligned.
8. The veterinary hospital of the future is now. Embrace what we have learned and make a commitment to continue to try new ways of delivering veterinary care.
9. Institute a "back to the basics" program, including but not limited to:
 - a. Employee training, culture, and job satisfaction
 - b. Management of reminder systems
 - c. Telephone answering skills
 - d. Advertising and social media strategic plan
 - e. Continuous effort to improve employee satisfaction
 - f. Continuous staff training and improvement
 - g. Continuous efforts to improve customer satisfaction

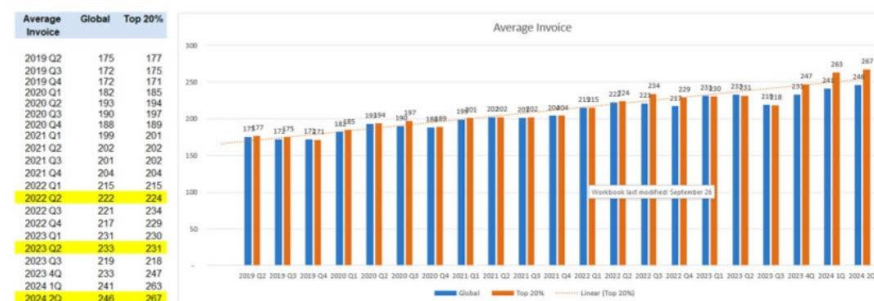
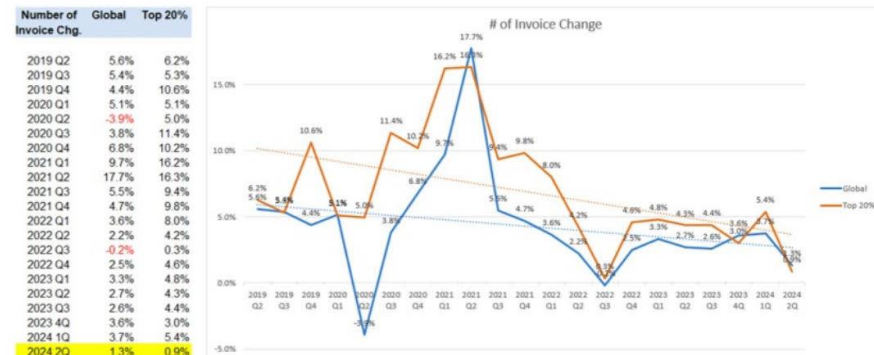
We have enjoyed participating in many of your VMG group meetings and look forward to many more upcoming meeting presentations.



Support staff minutes per invoice 2Q increased very slightly. The 20% most-profitable hospitals were 4.2% more efficient on the amount of time non-DVM staff spent per invoice. Consider efficiency opportunities such as billing and budgeting templates, scribes (AI) to assist DVMs, online scheduling, securing third-party storage of pet owner credit card information, and DVM leverage, to name just a few. Each hospital needs to continually assess opportunities and the patient flow to assure the correct leverage is provided to DVMs based on the number of patients DVMs see per hour. As we continue to learn more about "post-COVID times," we have come to the conclusion that associate DVMs are only going to see the number of patients they want to. It is important to understand the patient volume per DVM and how to staff accordingly.



Leverage has not changed for a decade. Continuing to staff the same will likely yield the same results. Many opportunities exist to improve efficiencies that may impact either staffing levels needed and or DVM patient volume. However, the DVMs must be aligned with increasing leverage, which means the expectation for the DVMs to increase the number of patients seen per day.



Invoices per full-time DVM have settled back to pre-pandemic levels. With a majority of associate DVMs earning a pro-salary, one theory is that due to price increases at the hospital, DVMs may or may not be willing to see the same # of patients per day. DVMs are seeing the same number of patients compared to pre-COVID days. What does a business owner do? Increasing the workload and asking for more production is not the answer. Embracing leverage and utilizing technology needs to be considered.

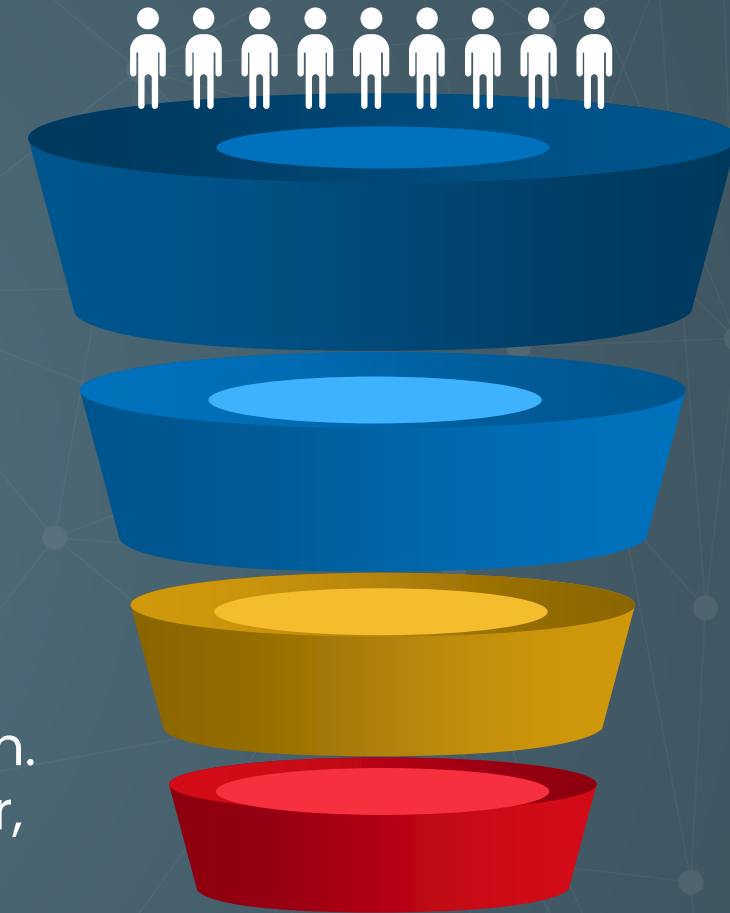
Retention Now Beats Acquisition

12

Acquisition costs spiked in 2020. The **competition for ad placement** both in search engines and social media got so fierce that it drove bidding costs to prohibitively high levels.

Now the magic word is "**retention**". Most merchants and online businesses are refocusing their efforts to optimize their **conversion funnel** towards generating **customer loyalty**. Moreover, brands are finding really imaginative ways to reward their most loyal buyers.

The **subscription model** is one big example of this phenomenon. Instead of having a one-and-done transaction with a customer, an increasing number of businesses and industries are shifting towards a new sales model. They now seek to add value in the form of subscriptions that transform their users into subscribers.



LOYALTY

ERIC D. GARCIA

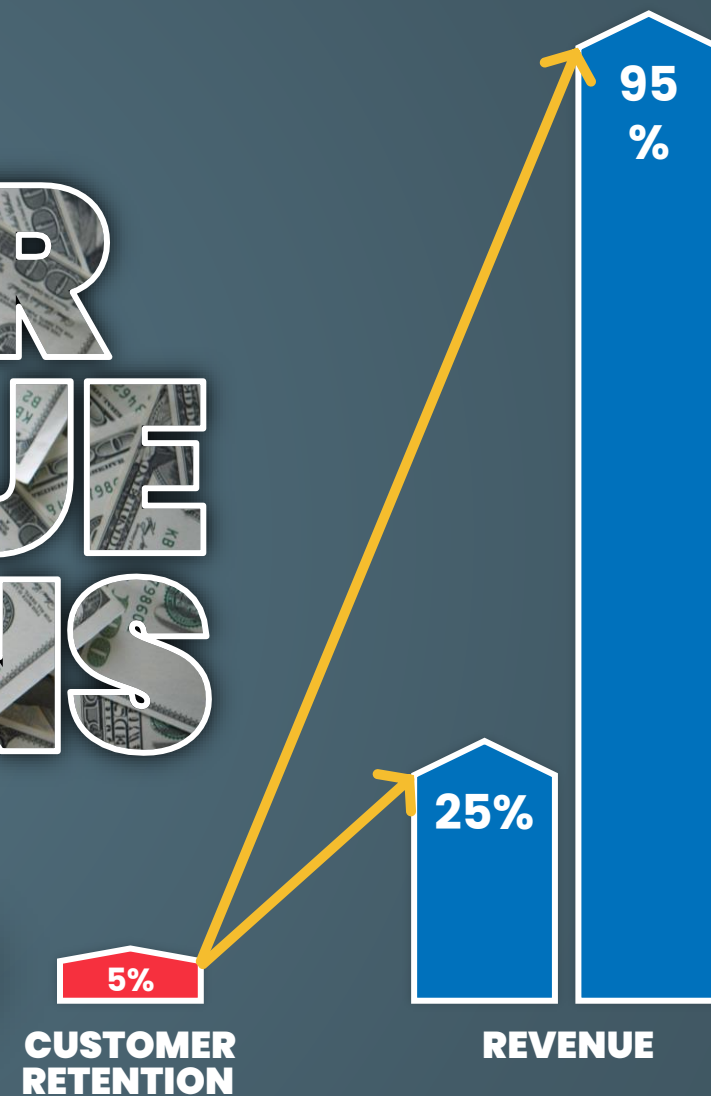
@EricGarciaFL

**SMALL
INCREASES**



**BIGGER
REVENUE
RETURNS**

Bain & Company &
Harvard Business School report that
"increasing **customer retention** rates by **5%**
increases profits
by **25% to 95%.**"



https://media.bain.com/Images/BB_Prescription_cutting_costs.pdf

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Netflix did not kill Blockbuster.
Convenience did.

Uber

Uber did not kill the taxi business.
Limited access and fare control did.



Apple did not kill the music industry.
Being forced to buy full length albums did.



Amazon did not kill other retailers.
Poor customer service and experience did.



Airbnb isn't killing the hotel industry.
Limited availability and pricing options are.

Netflix is a registered trademark of Netflix, Inc.

Uber is a trademark or registered trademark of Uber Technologies Inc.

Apple is a trademark of Apple Inc., registered in the United States and other countries.

Amazon and the Amazon logo are trademarks of Amazon.com, Inc. or its affiliates.

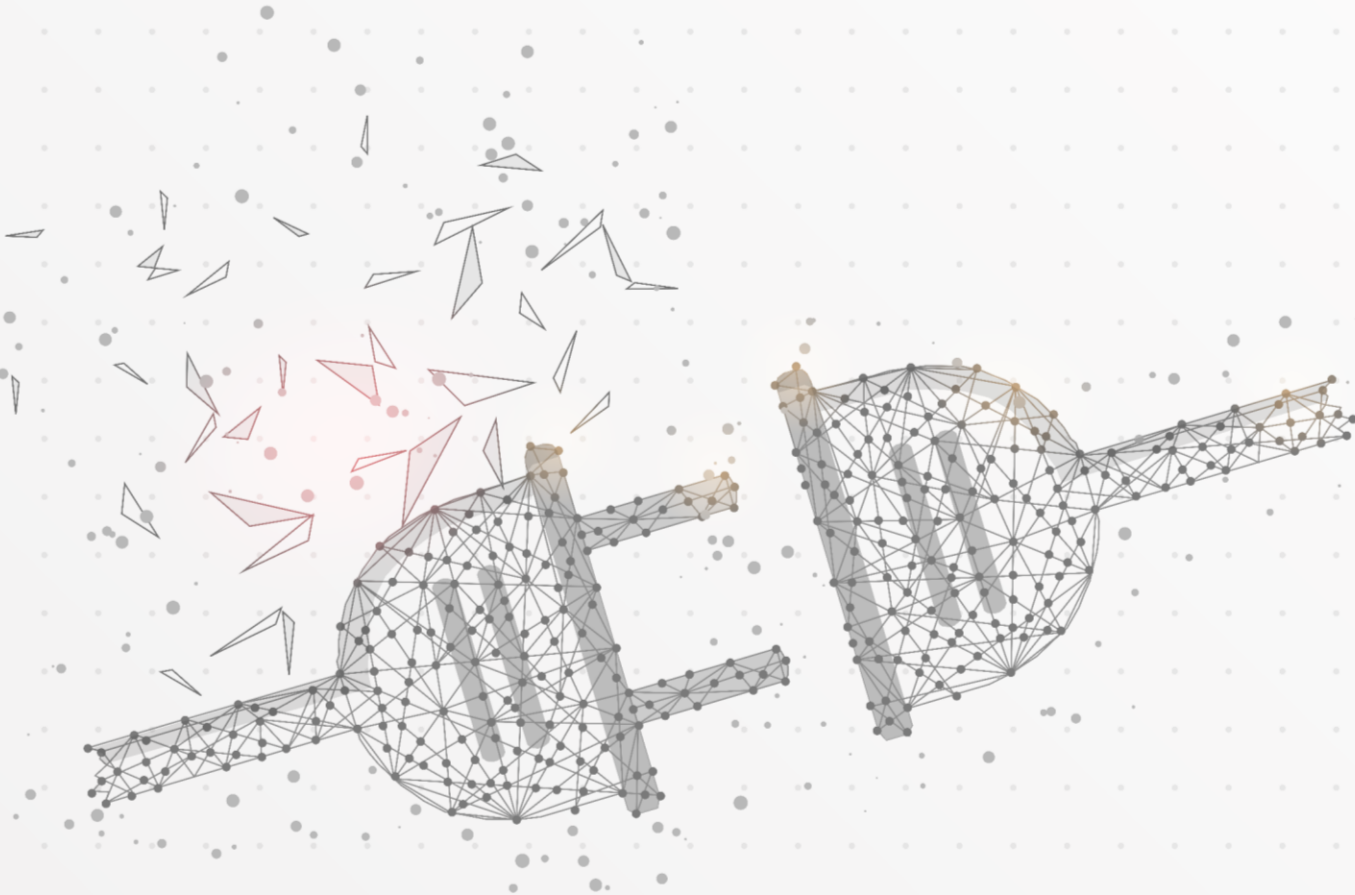
Airbnb is a trademark or registered trademark of Airbnb, Inc.

Source: Elliott T. Digital disruption is about customer centricity. timoelliott.com. <https://timoelliott.com/blog/2017/06/digital-disruption-is-about-customer-centricity.html>. Published June 28, 2017. Accessed February 25, 2020.

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"Technology by itself
is not the disruptor.
**Not being
customer-centric
is the
biggest threat
to any
business."** *Alberto
Brea*



“Do not deprive pet owners of the same conveniences and experiences we demand in our daily lives.”

Improve Efficiency



Define the operating experience: **It's not just about digital**

17

Amazon (a digital-first company) with **Walmart** (a more-traditional legacy business).

amazon

Amazon had **\$232.9 billion** in net sales and **647,500 full- and part-time workers**. Its sales per employee were **\$359,671**

Walmart 

In contrast, Walmart had **\$495.8 billion** in net sales and **2.3 million** associates. Its sales per employee were **\$215,548**

Amazon enjoyed **67% higher performance** per employee.

Data from 2018, "HBR's 10 Must Reads on Leading Digital Transformation"

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Myth:

Digital is about
technology

Reality:
It's about **the**
customer

"HBR's 10 Must Reads on Leading Digital Transformation"

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IDEXX

Finding the Time



Empowering Veterinary Teams to Get the Most Out of Every Day

An IDEXX Publication
February 2023

Written by
Sherouk Fetaih, MBA, MSc
Jason Johnson, DVM, MS, DACT


Study

idexx.com/findingtime





	ENGINE LIGHT ON “We are always trying to catch up and it never feels as though we have enough staff”	CHUGGING ALONG “We get by with what we have but would like more”	WELL-OILED MACHINE “We are set up for success – and we are always pushing for ways to get better”
Workflow	<ul style="list-style-type: none"> Staff-to-DVM ratio: 2.5:1 (small), 2.1:1 (medium/large) Limited technician-led visits Floorplan is an impediment to productivity (e.g., lack of centrally located treatment area) 	<ul style="list-style-type: none"> Staff-to-DVM ratio: 2:9:1 (small), 2:5:1 (medium/large) Technician-led appointments for low value services (e.g., nail trims, anal gland procedures) Medical staff supports DVM by performing lower-skilled tasks during clinical visits Floorplan limits “flow” (e.g., no windows on exam room doors) 	<ul style="list-style-type: none"> Staff-to-DVM ratio: 3.3:1 (small), 2.8:1 (medium/large) Technician-led appointments for high-value services (e.g., wellness visits, anal gland procedures) Medical staff supports DVM by performing higher-skilled tasks during clinical visits Optimized floorplan (e.g., computers in high traffic areas, bilateral accessible rooms)
Technology	<ul style="list-style-type: none"> Paper-reliant processes to review patient record, record history, notate findings and recommendations, review diagnostic results, etc. Paper-dependent (e.g., PIMS only used for scheduling and billing) Scheduling based on DVM availability 	<ul style="list-style-type: none"> Limited use of computers or tablets to review patient record, record history, Notate findings and recommendations, review diagnostic results “Digital” yet still dependent on paper records due to perceived need for “pack-up”/“check” Some calendar optimization by type (e.g., well vs. sick visits) 	<ul style="list-style-type: none"> Utilizes computers or tablets to review patient record, record history, notate findings and recommendations, review diagnostic results End-to-end digital workflows (e.g., check in, SOAP notes, discharge instructions, billing, pet-owner communication) Strategic scheduling (e.g., optimized by type, length, DVM vs. tech, staggered and forward booking)
Culture	<ul style="list-style-type: none"> Increasing staff compensation is not viewed as a lever to motivate or retain Lack of defined staff roles and responsibility Limited formal learning and development opportunities Team feels deflated or frustrated 	<ul style="list-style-type: none"> Increasing staff compensation is mainly a tool to retain staff Staff roles and responsibilities are ambiguous Formal training program somewhat deprioritized Team feels apathetic 	<ul style="list-style-type: none"> Increasing staff compensation to reward, motivate and ensure job satisfaction is a priority. Well-bonded team, with clearly defined rates and responsibilities Reinvests in practice (e.g., a dedicated staff training program to develop future expertise) Team feels empowered Dedicated practice manager (applicable for small clinics)

<https://storage.pardot.com/862631/16794825472zj8PRW4/FindingTheTime.pdf>

Practice Productivity Index™ for small practices (1-2 doctors)

	Engine Light on	Chugging Along	Well-Oiled Machines
	15.0 minutes	8.8 minutes	5.9 minutes
	\$256K	\$278K	\$337K
	Least Productive		Most Productive
	 Estimated time savings per clinical visit	 Potential annual clinical revenue lift	

Practice Productivity Index™ for medium/ large practices (3 or more doctors)

	Engine Light on	Chugging Along	Well-Oiled Machines
	8.3 minutes	4.8 minutes	3.1 minutes
	\$293K	\$290K	\$290K
	Least Productive		Most Productive
	 Estimated time savings per clinical visit	 Potential annual clinical revenue lift	

<https://storage.pardot.com/862631/16794825472zj8PRW4/FindingTheTime.pdf>

Observations About Growers

22

**Engage with clients
more frequently**

**Use robust
reminder
systems**

**Have a greater degree of energy
around communicating with pet
owners**

**Recognize the imperative that drives
better client communication**

- Clients want to be more empowered
- Clients as consumers are more critical of value they get from all products/services
- Information is empowering and value is a must

I used to think
communication was
the key until I realized
comprehension is.
You can communicate
all you want with
someone but if they
don't understand you,
it's silent chaos.

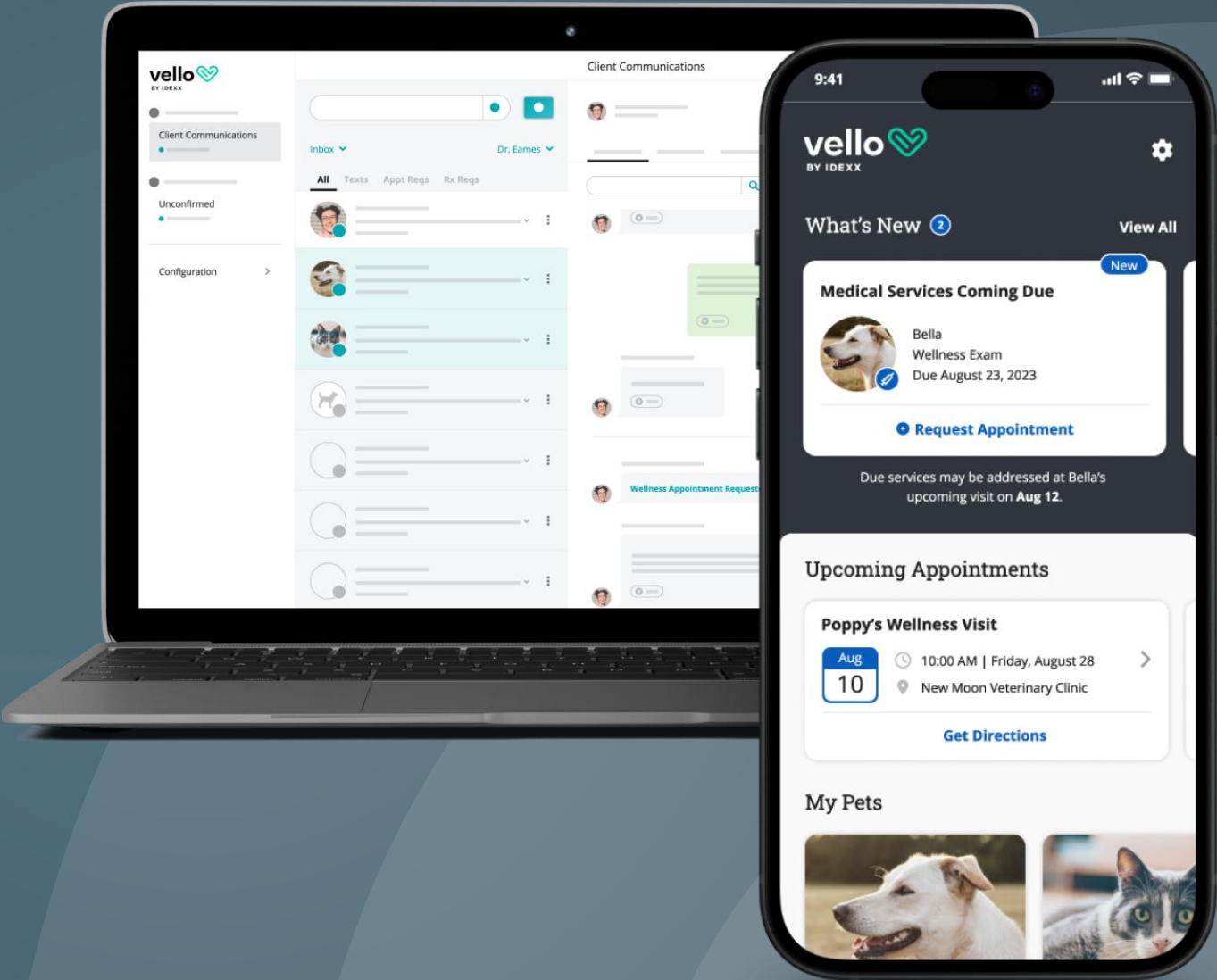


Communication Self Assessment Assets

Say hello to

vello

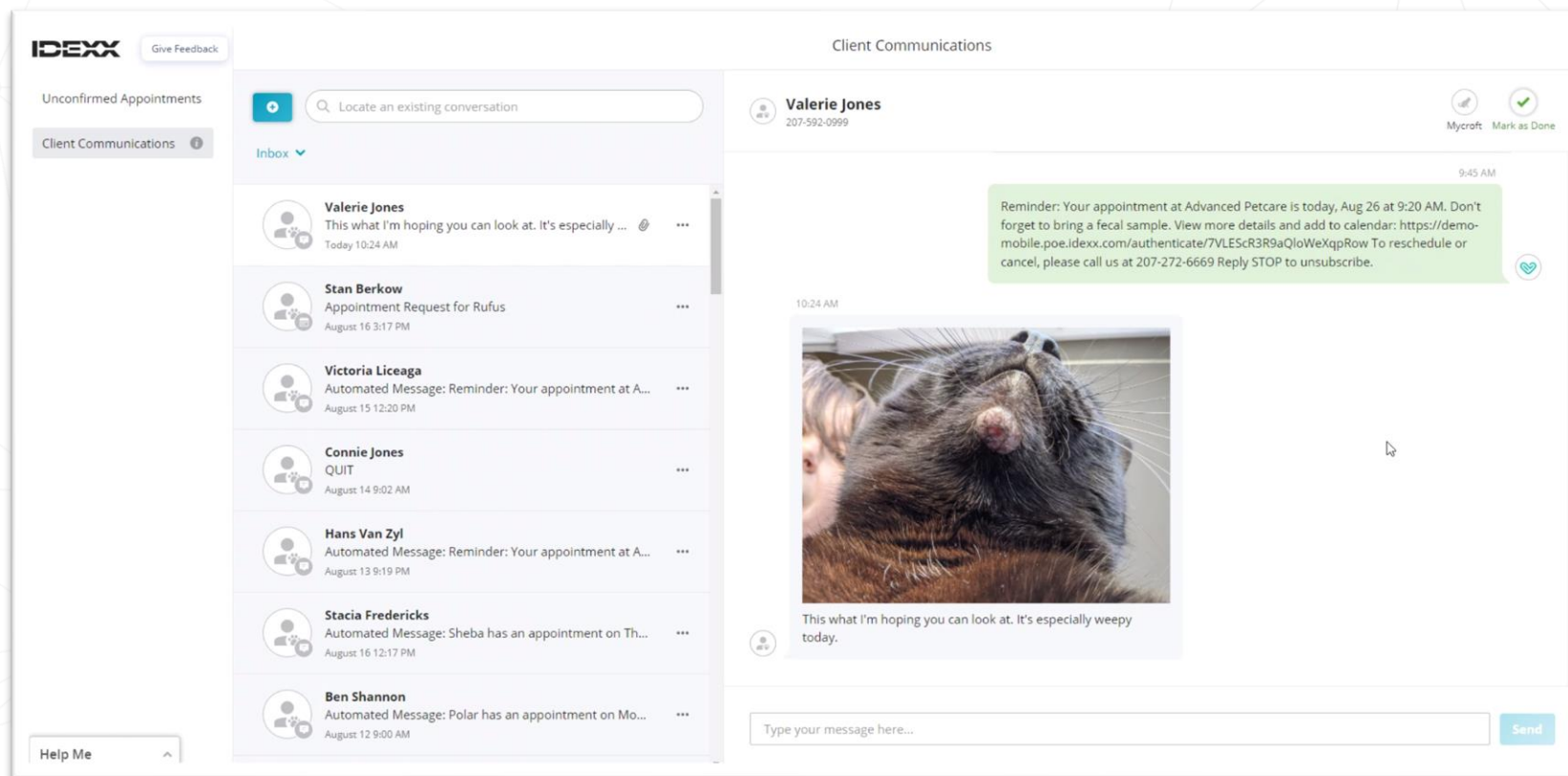
BY IDEXX



2-Way Text Messaging



26



Write Back Capabilities



27

The screenshot displays the Vello patient communication log for Mycroft Jones (ID: 0104). The interface includes a patient header with details like breed (Shorthair, American Feline), color (Black), and age (10 yrs 5 mos). The main section is titled "Patient Communication Log" and shows a list of messages. A search bar and date range filter (19-Aug 2023 to 19-Aug 2024) are present. The message list includes text threads, appointment reminders, and SMS messages. A sidebar on the right contains various action buttons like "Collect Payment", "Create Consultation", and "Send SMS".

Date	Type	To	Message	Staff	Status
19-Aug 2024 10:24 am	SMS	Valerie Jones ~12075485373	Text Thread Initiated	Vello	Sent
26-Jul 2024 1:21 pm	SMS	Valerie Jones ~12075485373	Text Thread Initiated	Vello	Sent
19-Aug 2024 9:45 am	Email	Valerie Jones valerie-jones...	Appointment Reminder	Vello	Sent
19-Aug 2024 9:45 am	SMS	Valerie Jones 207-592-0999	Reminder: Your appointment at Advanced Petcare is today, Aug 26 at 9:20 AM. Don't forget to bring a fecal sample. View more details and add to calendar: https://demo-mobile.poe.idexx.com/authenticate/7VLEScR3R9aQioWeXqRow To reschedule or cancel, please call us at 207-272-6669 Banks CTND is considering	Vello	Sent

Auto-Replies



28

Auto-Replies

Set your business hours and create a custom message to automatically respond to incoming messages sent to you during times when your business is closed



Your Business Hours:

Business is open

Timezone

(UTC-04:00) New_York

Sunday	Start of Day ▾	End of Day ▾	<input checked="" type="checkbox"/>
Monday	Start of Day ▾	End of Day ▾	<input checked="" type="checkbox"/>
Tuesday	Start of Day ▾	End of Day ▾	<input checked="" type="checkbox"/>
Wednesday	Start of Day ▾	End of Day ▾	<input checked="" type="checkbox"/>
Thursday	Start of Day ▾	End of Day ▾	<input checked="" type="checkbox"/>
Friday	Start of Day ▾	End of Day ▾	<input checked="" type="checkbox"/>
Saturday	Start of Day ▾	End of Day ▾	<input checked="" type="checkbox"/>

Auto-Reply Message

Thank you for your text. We are currently closed. If your pet is having
Emergency Vet Clinic.

Signatures

Create a custom message to be included at the end of all of your messages

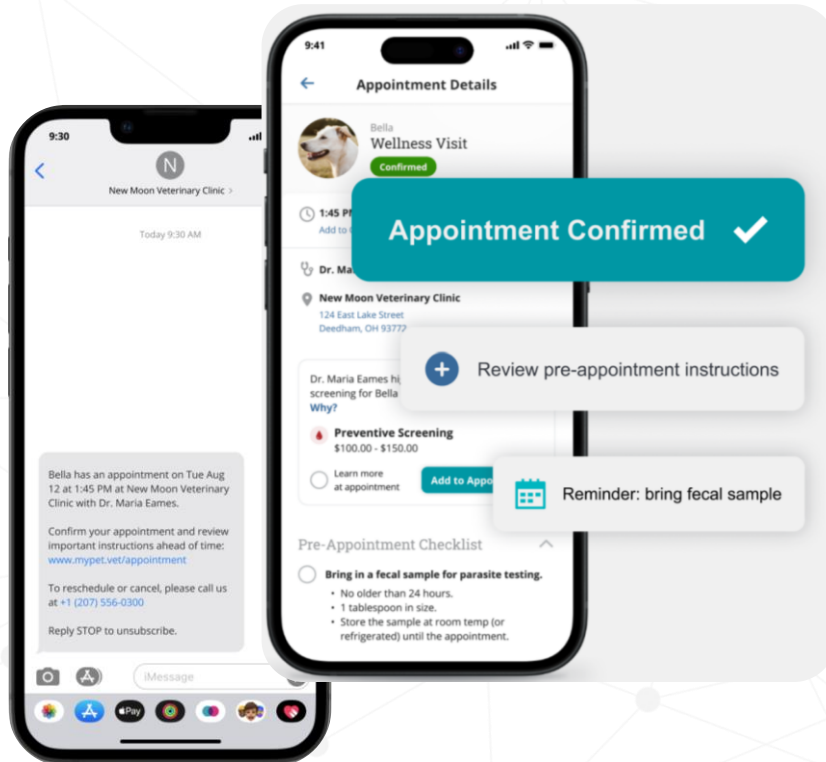
☒ Enable Signature

Signature Text

-From your friendly neighborhood vet clinic

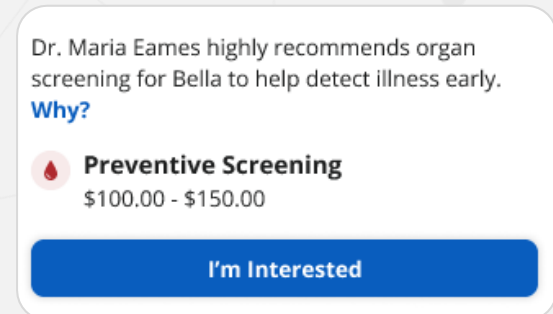
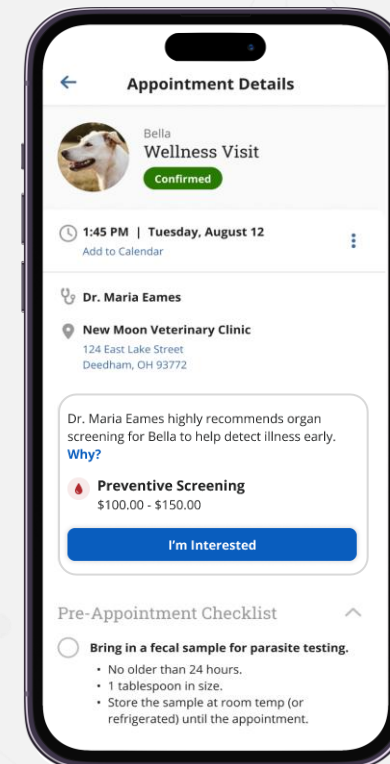
More Visits.

Vello helps practices efficiently get patients in the door with fully automated appointment and health service reminders to **reduce no-shows.**



Better visits.

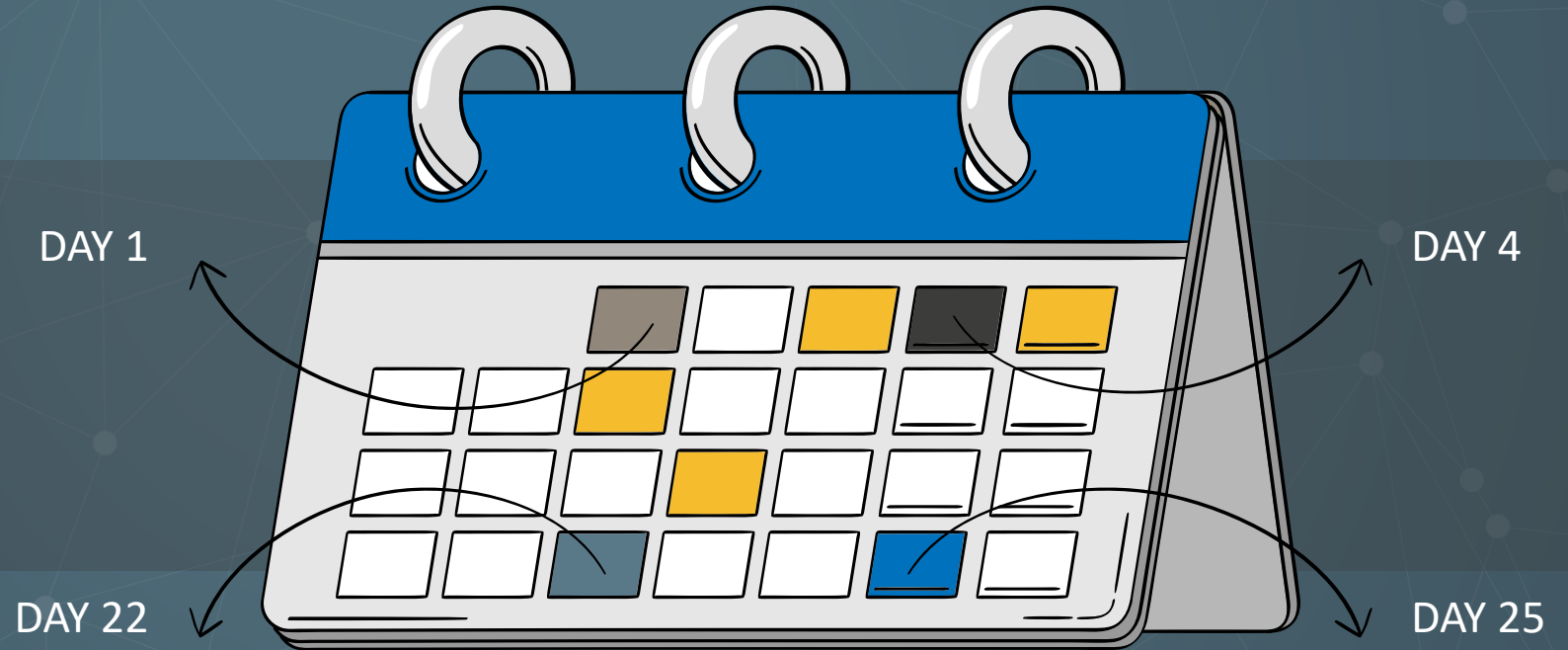
Vello helps practices ensure clients are prepared for visits with pre-visit instructions and bloodwork recommendations to **boost compliance.**



Real-Time Scheduling

30

**Allows for
real-time
appointment
scheduling!**



Vello Screenshots



New Phreesia research examining

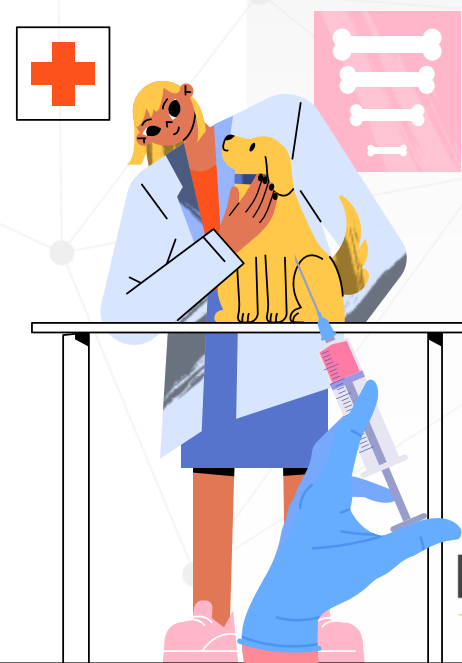
>**20.2 million**

digital vaccine messages

providing adults and caregivers with **vaccine information** just **before their appointments, or at the point of care,**

is an effective strategy for **SUPPORTING VACCINE CONFIDENCE AND ADOPTION,**

including among historically marginalized populations.



Source: phreesia.com

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Phreesia's research shows that **exposure to point-of-care vaccine messages** shifted patient

**KNOWLEDGE
ATTITUDES
BEHAVIORS**

In some instances, exposure to messaging drove vaccine administration rates

> 10X

higher than the control group.



Source: phreesia.com

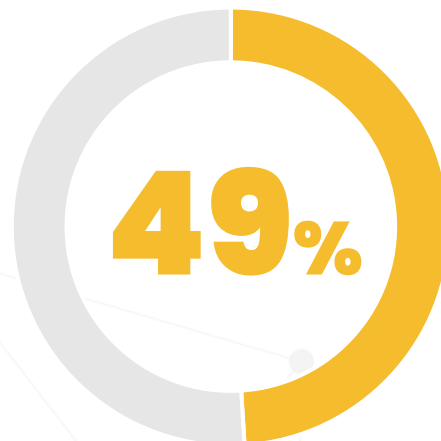
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2X

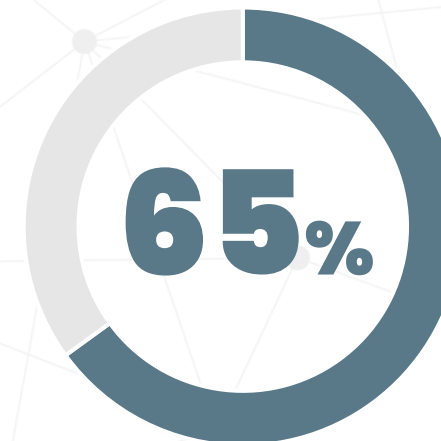
Patients **exposed to point-of-care messages** received **incremental vaccinations** at a rate more than twice as high, on average, than control groups who did not see point-of-care information

Source: phreesia.com

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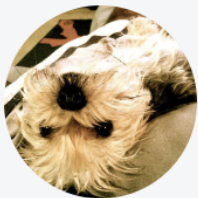


of patients who saw point-of-care messages said the information was new to them



said they were likely to discuss vaccines with their doctor





Elvis

Wellness Visit

Confirmed

🕒 8:20 AM | Saturday, March 16
[Add to Calendar](#)

👤 Dr. Smith

📍 Advanced Petcare
123 Main Street, Westbrook, ME 04092

Dr. Smith highly recommends organ screening for Elvis to help detect illness early. [Why?](#)

🩸 **Preventive Screening**
\$80 - \$200

I'm interested

Pre-Appointment Checklist

- ☐ **Bring in a fecal sample for parasite testing.**
 - No older than 24 hours.
 - 1 tablespoon in size.
 - Store the sample at room temp (or refrigerated) until the appointment.

Appointment Instructions

What to Expect During Your Pet's Annual Exam

Dog Checkups & Preventive Care

Routine wellness visits are a great way to help your pet live a healthy life for as long as possible. These visits can also help to catch potential health issues earlier and may help you avoid additional costs associated with treatments if disease goes undetected.

A typical wellness visit might include:

A physical exam

Veterinarians look for changes in your pet's teeth, weight, joints, skin, and ears. These changes may be signs of illness.

Diagnostic screening tests

Veterinarians check your pet's internal health. These results help to manage and track your pet's overall health.

A review of results

Veterinarians look for changes in results from year-to-year. Changes can act as early warning signs of health problems.

WHAT WE LOOK AT DURING A VISIT AND WHY

HEART AND LUNGS

Infection or disease can make it difficult for your pet's heart and lungs to deliver enough oxygen-rich blood to the body.

LIVER

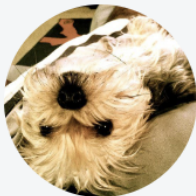
Your pet's liver may have trouble managing proteins, fat, digestion, and waste. These problems could be caused by disease, a blockage or even medication.

PANCREAS AND INTESTINE

Problems with these digestive organs may be due to an inflamed pancreas, diabetes, or some types of cancers.

KIDNEYS

SDMA* testing detects kidney disease earlier than other types of kidney tests.^{1,2} Results also reflect other diseases your pet may have that affect the kidneys.³



Elvis

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Appointment Instructions

More Visits.

19%

reduction
in no-show
appointment
rate¹



1. Data on file at IDEXX Laboratories, Inc. Westbrook, Maine USA. Practice N = 24 Neo beta practices. Appointment N = 150.5K. 6 months pre-Vello vs. 6 months post-Vello. Includes all practice visits/appointments. Individual results will vary.

Better visits.

17%

increase in
diagnostic
inclusion for
wellness
visits²



2. Data on file at IDEXX Laboratories, Inc. Westbrook, Maine USA. Practice N = 24 Neo beta practices. Appointment N = 23.3K. 6 months pre-Vello vs. 6 months post-Vello. Dx inclusion includes IRL/IHD/RA (does not include radiology). Wellness visit defined by the practice. All Wellness appointments included Pre and only Wellness appointments with Vello automation included post. Individual results will vary.

Create Pre-Appointment Videos

39

An Important Message From Our Medical Director



MEADOWMONT ANIMAL HOSPITAL'S STORY

MEADOWM  NT
Animal Hospital

Before

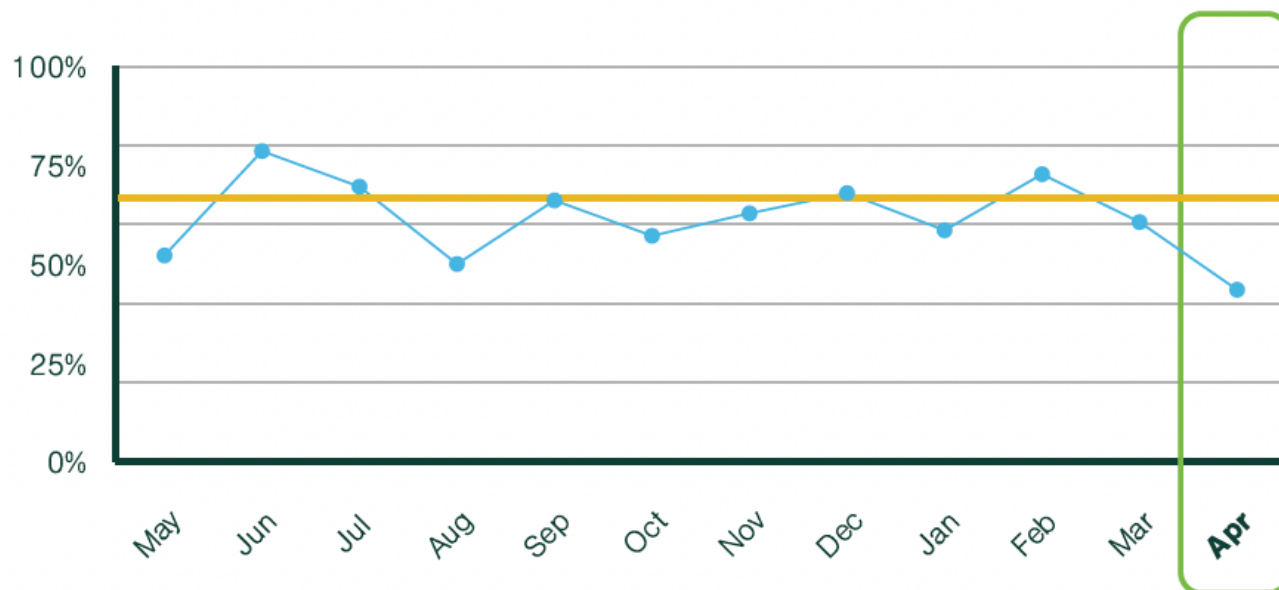
**What percentage of your new clients who had their first visit 18 months ago have returned?
How is this changing over time? (April 2024)**

Your performance:

43%

Benchmark:

67%



Challenges:

Transient clients
Because they're in a
college town.



Reminders:

4

Reminders
(email and text)



After

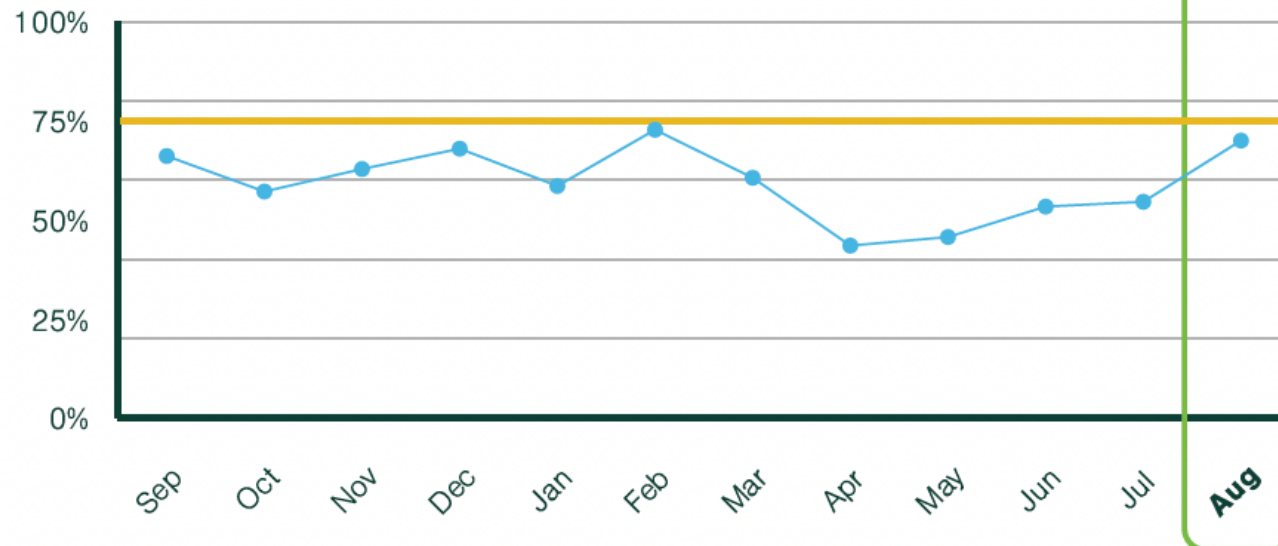
What percentage of your new clients who had their first visit 18 months ago have returned?
How is this changing over time? (Aug 2024)

Your performance:

70%

Benchmark:

75%



MEADOWMONT
Animal Hospital

42

Reminders:

11



Upcoming Reminders

How many weeks **before** a reminder is due would you like to send an email?

4 weeks

2 weeks

Off

Past Due Reminders

How many weeks **after** a reminder is due would you like to send an email?

2 weeks

4 weeks

6 weeks

Scheduling

What **day of the week** and **time** would you like to send this email?

Tuesday

Early Morning (6 am - 8 am)



Simplicity & Better Visits



Ask: Open Ended Questions

"Can you describe any changes you've noticed in your pet's behavior or habits recently?"



"What concerns do you have about your pet's health or behavior?"



"What kind of diet is your pet currently on, and have there been any recent changes?"



"Can you walk me through a typical day for your pet, including eating, playing, and sleeping habits?"



"Can you tell me about your pet's exercise routine and activity levels?"



"How has your pet's mood and energy level been lately?"



"How does your pet typically interact with other animals or people?"



"Can you describe any recent environmental changes, like moving to a new home or adding new pets to the family?"



"Have you observed any new or unusual symptoms, such as coughing, sneezing, or limping?"



"Are there any specific health issues or conditions you're particularly worried about or want to discuss today?"



Medical Record Keeping

46

abridge

**“Envisioning a world where clinicians get home on time every day,
with all of their charts closed by the end of their shift.”**

78%

average reduction in
documentation time
according to Ambience

2 hours

Saves doctors 2 hours per
day on average
according to abridge

Likely to swap next slides with new ezyVet & Neo AI feature

Pending Stan insight



Transcribing



Doctor: "Hello Mrs. Wilson! How can I assist you and Whiskers today?"

Client: "Hi Dr. Hayes. I've been concerned about Whiskers. She hasn't been eating her usual amount these past few days. And she's been hiding under the bed a lot, which isn't like her."

Doctor: "Any vomiting, diarrhea, or coughing?"

Client: "Nope. But I did hear her cough a couple of times last night."

Doctor: "Alright. I'll start by doing a physical examination Ah, I can feel a light enlargement in her lymph nodes. We'll run some blood tests to get a clearer picture. In the meantime, let's put her on a mild appetite stimulant and see if that helps. We'll re-evaluate once we have the test results. Sound good?"

Client: "Yes, thank you, Dr. Hayes. I just want her to feel better."

Generating Note...



Subjective:

- Owner reports decreased appetite for several days.
- Increased hiding behavior observed.
- Occasional coughing noted.

Objective:

- Physical examination revealed enlarged lymph nodes.
- No signs of vomiting or diarrhea.

Assessment:

- Possible underlying infection or other systemic issue, given the enlarged lymph nodes and decreased appetite. Coughing may be related or a separate concern.

Plan:

- Order blood tests to assess overall health and potential causes.
- Prescribe a mild appetite stimulant.
- Re-evaluate patient once test results are received.

ezyVet | Sales Sandbox trial

sandboxna.use2.ezyvet.com/#

Gmail

Calendar

LinkedIn

HappyDoc

Salesforce

Sales

PIMS

Business

Dev

Reference

Communities

Sales Sandbox trial > Demo
West Olympic Boulevard
West Olympic Boulevard Inventory

Dashboard

Contacts

Patients

Clinical

Financial

Reporting

Admin

Help

Search

JD

🔔

🔄

✉️

Search

304129 - "Buddy" Smit...

304146 - "Buddy"...

Recent

Active

I/A

All

304146 - "Buddy" Smith (02-10-2024)

304145 - "Abc" Adamo (02-10-2024)

304120 - "Ima" of Brown, Liz (02-10-2024)

304128 - "Eden" Lee (02-09-2024)

304144 - "MAX" Ren (02-09-2024)

304143 - "Palmer" Fisher (02-09-2024)

304142 - "Sushi" Needham (02-09-2024)

304139 - "Abby" Gomez (02-08-2024)

304138 - "Sloane" Smith (02-08-2024)

304136 - "Palmer" Fisher (02-08-2024)

304135 - "Harold" Hutchinson (02-08-2024)

304115 - "Merlin" Davis (02-08-2024)

304127 - "Maui" Williams (02-08-2024)

304133 - "Apollo" Walker (02-07-2024)

304132 - "Carnie" Baxter (02-07-2024)

304131 - "Yahzee" Beckett (02-07-2024)

304130 - "Marco" Cleary (02-07-2024)

304129 - "Buddy" Smith (02-07-2024)

304125 - "Luna" A (02-06-2024)

304126 - "Marco" Cleary (02-06-2024)

304122 - "Bill" Smith (02-05-2024)

304089 - "Rover" of Ezyvet Support (02-05-2024)

304123 - "Astrid" Able (02-05-2024)

304121 - "Abc" Adamo (02-03-2024)

304118 - "Molly Latest" SmithLee (02-02-2024)

304117 - "Scoops" Gibbons (02-02-2024)

304110 - "Abby" Godfree (02-01-2024)

304111 - "CHI" Fisher (02-01-2024)

304109 - "Ima" of Brown, Liz (02-01-2024)

304114 - "CHI" Fisher (02-01-2024)

304113 - "Billy Bob" Addams (02-01-2024)

Total: 101

<<

<

1 of 4

>

>>

Medical

Dental

Image Annotations

Health Status

S.O.C.

Wellness

Imaging

Financial

Summaries

Appointments

Communication

Memos

Attachment

Change Log

Merge

Send Email

Send Fax

New Memo

New Invoice

New Estimate

New Payment

Create Document

Print Label

Callback

Send to Vet Radar

New Claim

New Prescription Request

Disable

📷

Patient

Buddy (?)

Patient ID: 201053

Not Set - 64.00lb

Canine (Dog) - Chihuahua

Complete History

Demeanor

Unknown

Owner

Smith, John

Current Balance \$113.56

Pending Invoices(9) \$2,834.94

Total \$2,948.50

Consult

Consult # 304146 02-10-2024

West Olympic Boulevard

Clinical Layout: None

Case Owner: chad

Related Records (6)

Date	Number
02-07-2024	304129
11-15-2023	303937
11-01-2023	303892
10-25-2023	303865
05-27-2023	303480

Page: 1 of 2

Clinical Exam

Diagnostics and Treatments

Vaccinations

In Clinic Notes

Communication

View By Item

Go to Combined View

Presenting Problem

Master Problems (0)

✓ Show active only ☐ Show disabled

No Results

Vitals (0)

No Results

History (0)

No Results

Physical Exam (0)

No Results

Assessments (0)

No Results

Plan (0)

No Results

Recommendations (0)

No Results

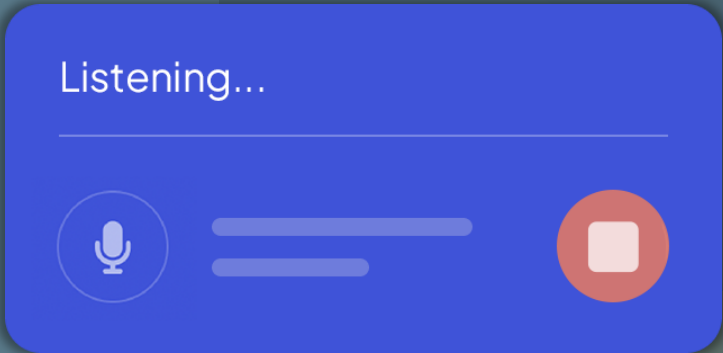
HappyDoc

👤

📱

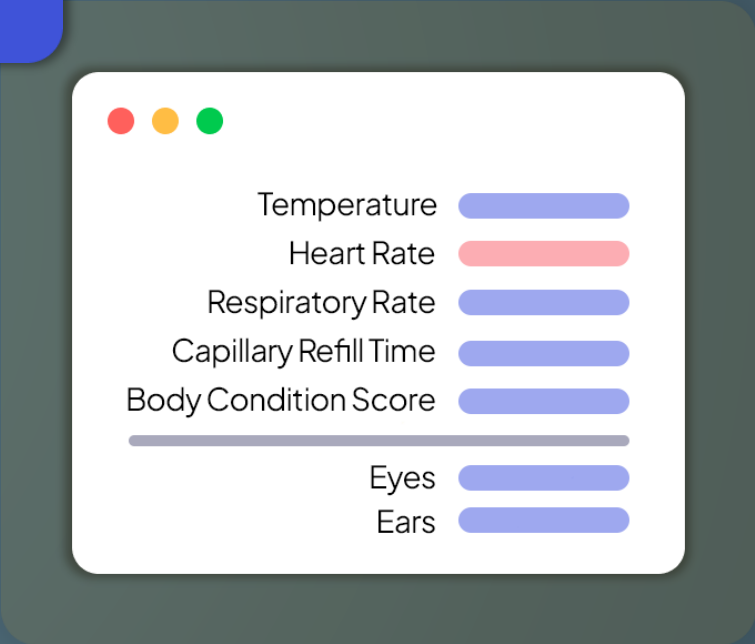
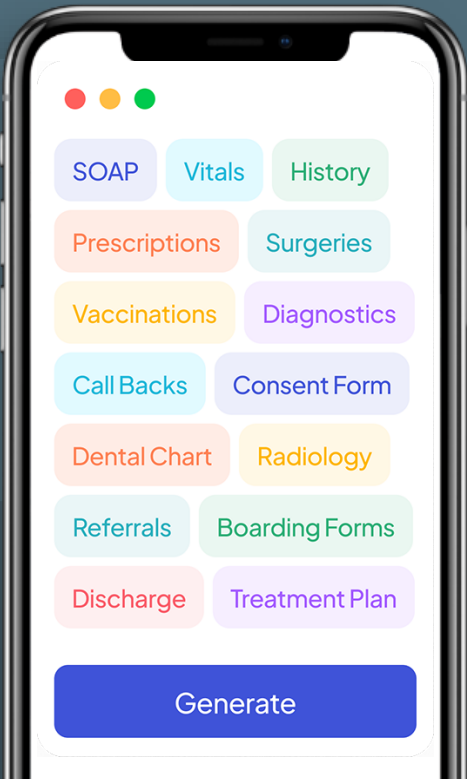
Most Common Uses

- Exam summary in SOAP format
- Surgery summary
- Automatic TPR
- Copy and Paste into PIMS
- Time Saving!



Future Benefits

- Direct PIMS
- Differential Diagnosis
- Transcribe Call Backs with RX Refill



Use Client-Friendly Language to Improve Perception of Value



Rephrase technical terms into simple language during your examination.

Instead of **“palpation of the abdomen,”** you might say, **“I’m feeling for any unusual areas in the stomach region.”**



Narrate the Exam Flow as You Go

For example, saying, **“Next, I’m going to check Bella’s heart rate and breathing to ensure everything sounds clear,”** gives the AI context clues for each SOAP section while reassuring the client.



Emphasize Findings Clearly

When dictating findings, such as **“normal,” “mild,” or “severe,”** emphasize them so the AI correctly interprets the assessment, and the client can follow the exam’s progress.

Use Client-Friendly Language to Improve Perception of Value



Verbally Summarize Key Points

Summarize findings after each section (e.g., examination, diagnostic tests). This structured summary can lead to more accurate SOAP notes and keeps clients well-informed.

Engage the Client with Open Statements

By saying things like, **“Let’s see what Bella’s ears look like,”** you engage the client while giving the AI clarity on which exam portion you’re addressing, enhancing SOAP note structure.

Use Consistent Phrasing for Exam Findings

The AI learns better with repeated, structured phrasing.

VetConnect+

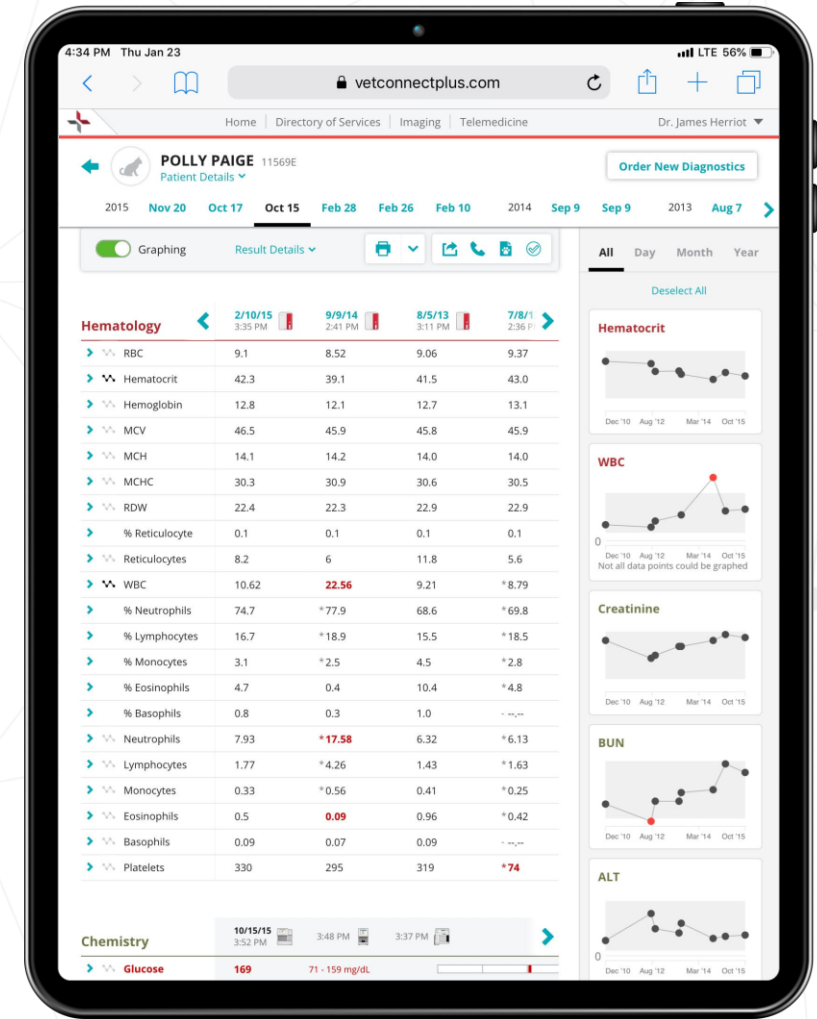
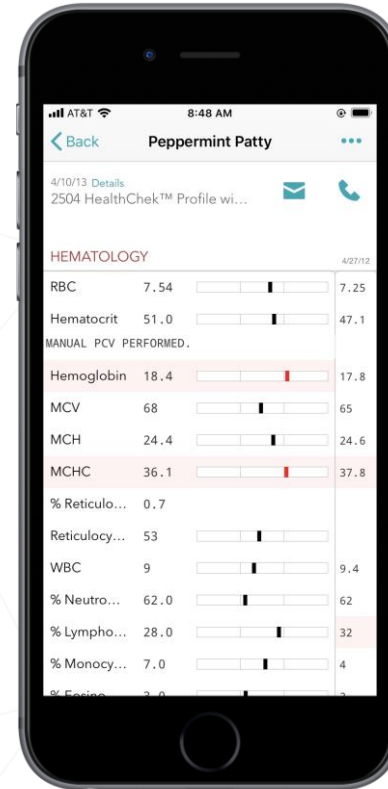
53



Allows you to access patient blood work 24/7

Easily accessible on phones & tablets

Able to review results with client using tablet



Species: Canine Tested: 8/15/19
Year of Birth: 2008 Report: Preventive Care

Darcy

Burton

We're so glad you brought in Darcy for a routine wellness visit that includes screening tests. Running these tests every year helps us understand what's normal for your pet as well as screen for common conditions. Subtle changes in your pet's test results can signal the presence of disease even before any outward signs of illness can be seen.

Routine wellness visits help your pet live a healthier life

Screening tests help us catch potential health issues earlier and may help you avoid additional costs associated with treatments if disease goes undetected. Here's what we looked at during your pet's visit and why:

Blood

A complete blood count (CBC) tells us if your pet is fighting an infection or has some bleeding problems. A blood test can also find diseases spread by ticks and mosquitoes.

Thyroid

If the thyroid glands aren't releasing the right amount of hormones, your pet's metabolism could be affected.

Heart and lungs

Infection or disease can make it difficult for your pet's heart and lungs to deliver enough oxygen-rich blood to the body.

Pancreas and intestines

Problems with these digestive organs may be due to an inflamed pancreas, diabetes, or some types of cancers.

Liver

Your pet's liver may have trouble managing proteins, fat, digestion, and waste. These problems could be caused by disease, a blockage, or even medication.

Kidneys

SDMA[®] testing detects kidney disease earlier than other types of kidney tests.^{1,2} Results also reflect other diseases your pet may have that affect the kidneys.

Urine

Urine tests tell us if your pet has problems like infection or stones in the kidneys or bladder. They can also tell us about some cancers.

3 ways to help your pet stay as healthy as possible

1. Support a healthy lifestyle with proper nutrition and exercise.
2. Schedule your pet's next routine wellness exam for August 2020.
3. Learn more at: pethealthnetwork.com/pettests.

We're here for you and your dog. Please reach out if you have any questions about your dog's nutrition, behavior, or health.

Dr. Roy
mail@animahosp.com
Animal Hospital

Tested: 3/13/15
Report: Mosquito & Tick Screening

Peppermint

Mosquito & tick-borne diseases in Maine¹

You know your dog better than anyone else. That's why your role as the "watchdog" for these infections is critical. Your dog can be exposed to these infections in almost any outdoor location where ticks and mosquitoes can be found and risk varies from region to region. Review the infection descriptions below, and watch for the most common signs associated with these diseases. Symptoms may be hard to detect in the early stages so we recommend this parasitic disease screen at your dog's annual checkup. Work with us to find infections early, because early intervention is important for a lifetime of good health.

Heartworm

✓ None detected

Mosquito
Maine risk: 1 out of 10 dogs
Heartworm is a parasitic infection transmitted by mosquitoes. Symptoms may include mild persistent cough, fatigue, being tired after moderate exercise, weight loss, and reduced appetite.

Lyme disease

✓ None detected

Deer tick
Maine risk: 1 out of 7 dogs
Lyme disease is a bacterial infection transmitted by deer ticks. Symptoms may include lameness, reluctance to move, swollen or painful joints, lack of energy, and urinating more.

Anaplasmosis

✓ None detected

Brown dog tick
Maine risk: 1 out of 14 dogs
Anaplasmosis is a bacterial infection transmitted by brown dog ticks and brown dog ticks. Symptoms may include loss of energy, lameness, swollen or painful joints, and loss of appetite.

Ehrlichiosis

✓ None detected

Brown dog tick
 Lone star tick
Maine risk: 1 out of 100 dogs
Ehrlichiosis is a bacterial infection transmitted by brown dog ticks and lone star ticks. Symptoms may include loss of appetite, depression, lameness, swollen or painful joints, bloody nose, and pale gums.

COMBINED INFECTION RISK

No Data Emerging Moderate High

1. Prevalence data for 2012 courtesy of dogandticks.com and © 2012 Google

We recommend a follow-up visit in one year

What can you do next?

1. Support a healthy lifestyle with proper nutrition and exercise.
2. Check for ticks regularly. For info on ticks & removal: www.dogandticks.com
3. Review resources about canine wellness: pethealthnetwork.com/dogs-home
4. Follow your veterinarian's instructions for prevention of disease in your dog, including topical treatments, collars and vaccines.
5. Schedule your pet's next preventive care screening for August 2017.

We're here for you and your dog: If you have any questions about your dog's nutrition, behavior or health, we'd be happy to talk with you anytime. (207)554-0300.

Dr. Blinker
544-123-1212
Cornerstonevet@gmail.com
IDEXX Demo Practice
www.IDEXX.com

Celebrate Healthy Pets!

55

- Give a heartfelt Thank You
 - Look client in the eyes
 - You're such a great pet owner, Mr. Garcia. I would like to thank you for trusting us with your pet's health needs. You should know we're always here for you and Gazpacho.
- Celebrate healthy lab results
- Celebrate healthy pets

**Attribute
success with
what you do
as a team**

New marketing toolkit teaser



You're Not Alone...
Find a Partner!

IDEXX
LABORATORIES

BOOTH:

The information contained herein is intended to provide general guidance only. As with any diagnosis or treatment you should use clinical discretion with each patient based on a complete evaluation of the patient, including history, physical exam and presentation, and laboratory data. With respect to any drug therapy or monitoring program, you should refer to applicable product insert(s) for complete description of dosage, indications, interactions, and cautions. Diagnosis, treatment, and monitoring should be patient specific and is the responsibility of the veterinarian providing primary care. (2024)

Stay Connected

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*We thank you,
with all our **heARTS***

Please rate your speaker and session in the app!

Presented By:

