

Click.
Connect.
Communicate.

A guide to optimising your clinic in 2022

[Get started!](#)



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The purpose of this Workbook and how to use it

Welcome! You're here because you want to review all areas of your clinic management and look at best practice. The idea is that you will constructively review the areas that need attention or improved upon. It might also help inspire you, where we're able to help manage your clinic more efficiently. Being honest and constructively critical will help you *'identify the dirt so that you can tidy it.'*

Taking care of pets and running a business to the best of its abilities can be stressful. Most of the time, it's easier to let the commercial side of running a vet clinic slip, because taking care of animals are your passion and more important.

Our mission is to empower veterinary teams to deepen their relationship with consumers through a Connected Practice that improves clinical and business outcomes, serving happier pet and horse owners. Dealing with change management and continuity of care will be important for you.

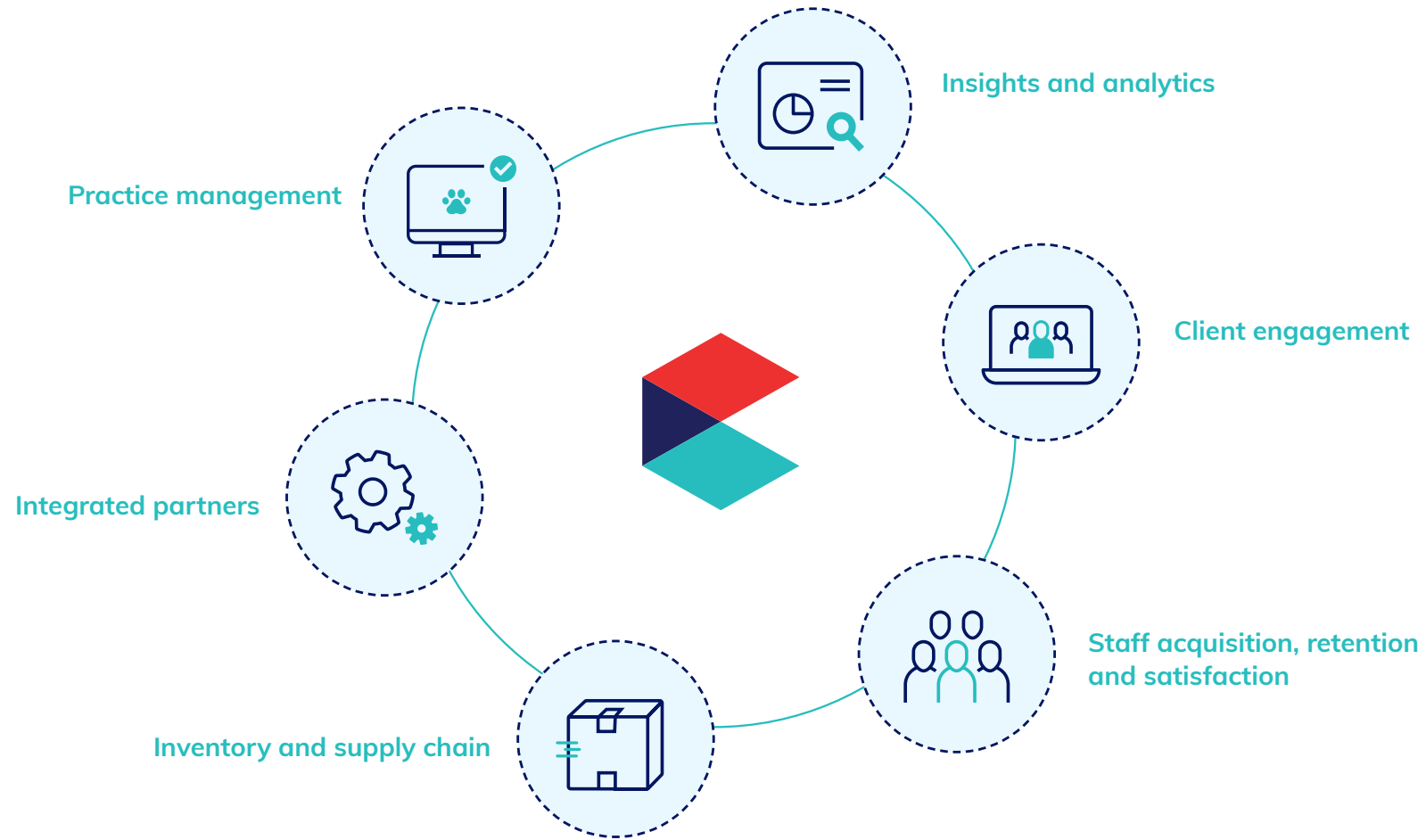
By setting aside 45 minutes to one hour on this Workbook, you can set yourself up for an excellent strategy and inspire solid, actionable steps to improve your clinic. This can translate into better customer reviews, more client engagement and potentially even increased revenue!

Resources will also be outlined for each section that gives you ideas, inspiration or access to tools, templates and more to help you in your job.

Let's get started then. It makes sense to review it, in the key areas we know to be part of the main ecosystem in a veterinary clinic.



The clinic's ecosystem





Section 1:

Client acquisition, engagement and marketing

In this section, we'll review your current client-engagement efforts to begin with, as this is an area you can make immediate improvements as well as DIY marketing you can implement straight away. By answering the questions below, for any 'no' answers or if the frequency is low, it is an area you could potentially change tactic on or improve upon. You can also add it to your list of existing methods you already use.



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Q1

Q2

Q3

Q4

Q5

Resources

Do you have a dedicated marketing person?

If not, why not? e.g. budget constraints , lack of time, etc. Evaluating this will help you understand if you need a dedicated person or not as well as the skill-sets available in your practice.



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Q1

Q2

Q3

Q4

Q5

Resources

Which areas/channels of marketing do you utilise?

Please select yes/no then list the order of importance in the # column

Online	Yes	No	#
Paid Ads			
Organic Ads			
Facebook			
Instagram			
LinkedIn			
Twitter			
Content Marketing/ SEO/ Blogs			
Email Marketing			
SMS/ Text Messaging Reminders			
Website marketing/ promotion			

Offline	Yes	No	#
Direct Mail Marketing			
Phone Calls			



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Q1

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Resources

Do you have a content calendar that roughly outlines content, offers and services you want to promote, including blog content ?

Use our free ['Content Calendar' Template](#) to help you schedule and plot blog posts and content for the year.



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Q1

Q2

Q3

Q4

Q5

Resources

Do you actively manage and maintain your website?

How often do you update it?

Do you run any ads?

How?

Smart Insights do an excellent blog on [different ad types](#) you can think about and run



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Resources

Do you use email marketing to help retain clients and how often are you emailing them?

Email allows you to connect with clients in an intimate valuable way, it can help build loyalty and to promote services, products and certain reminders such as vaccines and boosters, or pet health plans. You can think about how to send more meaningful communication as opposed to spamming them.

Do you send out letters/ postcards or any direct mail?

Direct mail can sometimes be dismissed as people often think it goes straight in the bin. And the reality is, sometimes it does. However some statistics suggest it can be powerful. Direct mail breaks through the digital clutter. 80% of millennials report being attentive to direct mail, while 50% say they ignore digital ads and 83% of purchases are influenced by direct mail. (The Shopping Shift).

They are stats we cannot ignore. You can think about promoting any of the lists on the next page, in a postcard to your customers.



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Q4

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Resources

Resources:

Things you can promote on any of the channels identified in Section 1

- Your best selling products
- New services and offers (it can be packaged in any way e.g animal specific, seasonal, vaccine reminders etc)
- Team/staff updates and expertise
- Pet health/ wellness plans
- Vaccine reminders/ appointment reminders
- Guidance on bookings and appointments
- Partnerships
- Client reviews
- Annual Pet holidays
- Interviews
- Tips and Advice

Use the resources below to help with your content and distribution

- Learn more about Content Marketing, SEO and Social Media [here](#)
- Read 'Four tactics to engage Pet Owners & Welcoming New Pet Owners to your Practice' [here](#)
- Use the '[Content Calendar](#)' Template to help you schedule and plot blog posts and content for the year.



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Resources

Case Study

For Cleveland Veterinary Clinic, they used RxWorks to automate their client communications.

Dr Selena Steiner and her team enjoy the benefits of automation and the multitude of functions that come in handy from integrating wellness plans to automated client communication.

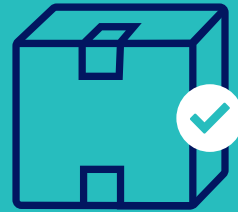
As part of the clinic's efforts, they found the biggest jump in revenue when the SMS appointment reminder program kicked into gear. Recalls such as thyroid and kidney disease reminders, have helped the practice in their growth phase as well as the demand in a COVID-19 world.

Functions like VetCheck which provides a suite of veterinary forms, patient care videos and handouts to share with customers, provide added value for them and makes their jobs that little bit easier to communicate with clients.

"For dental month, we were able to easily set this up as part of our care plans. It was quick, simple and easy. Other things include our twice for life program and regular communications around COVID-19. The outsourcing offering gives us the capacity to do things we've not been able to do before. The SMS function makes all the difference us in terms of communicating with clients and improving our retention rate in the practice as well as reducing no shows."

– Dr Selena Steiner

Get in touch with our team to discuss how we can help you with your client communication.



Section 2:

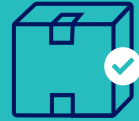
Inventory management and supply chain

Did you know that inventory management is the second-largest expense for veterinary clinics, next to the cost of labour? As an industry, like most in healthcare institutions, it can be an extremely wasteful industry too, with all the consumables, half used liquids, vaccines and more, going straight to the bin. Every item on your shelf represents cash – and potential waste. The raw cost of items, the cost of storing, spoilage and wastage can be bad for business and hard to manage.

In this section, it is an opportunity for you to review how much effort and resource is put towards your stock management and stocktaking efforts, as well as being mindful of cost and the environment.



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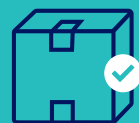
Q8

Resources

Do you know if your practice is understocked or overstocked?



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Resources

Do you have inventory thresholds and categories to help maintain proper stock levels thereby improving cashflow?

e.g. something like the table below:

	Type of Product	Example
A	High-value, high-volume pharmaceuticals	Vaccines, flea treatments, wormers, non-steroidal anti-inflammatory drugs
B	Mid-Value, mid-volume pharmaceuticals and high-volume consumables	Prescription diets, chronic medication
C	Low-value, low volume pharmaceuticals	Most Consumables, blood transfusion sets, urine sample kits, barium

As you categorize your products, by product accounts, animal type and so on, it can also be linked to your pricing, offers and discount schemes. Below is an example of one of our customers after setting up a process and system using our technology, she says:

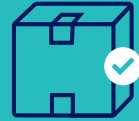
“We used to have a situation where we’d credit an item and it would go missing. Also, we’d do a stocktake and it would be accurate for a while. But, as time passed, this would become inaccurate, meaning our stock control was loose. Now, when we do a stocktake, for example, there aren’t massive gaps in tablet numbers, injections, and other stock items. Stock on hand is now also more accurate, which means a decrease in overordering and less expired stock. All stock is now invoiced and charged correctly. Our vet hospital is busier than ever and the change to RxWorks has been very helpful with accurate invoicing, stock control, and overall productivity.”

– Julie Rottenbury, Group Pharmacy Supervisor, Charter Vets

Find out more [here](#)



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Resources

How do you organise your mark-ups, margins, pricing and turnover? Is this monitored continuously?



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Q8

Resources

Do you have tools and technology to monitor what the selling price should be, what's shifting, what needs to be replenished and so on?

Do you visually and easily see what is high demand (should turn every 30-45 days) and low demand (to know whether you discontinue)

If no to any of these questions, there's a high risk you have expired products/ high wastage/ and lost revenue. You should consider more robust inventory practices, strategy work and a policy document around this. Technology and reporting tools for inventory management will also help your clinic greatly.

[Contact our team for a free consultation](#)



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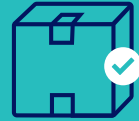
Do you establish ordering efficiencies and purchase from a single supplier or multiple suppliers? Write down all your suppliers below and where you think you can streamline:

Engaging with different suppliers can make the process tedious and time-consuming. Using a single distributor or supplier will streamline orders and help your team develop trusted relationships as well as thinking about sustainability and the environment e.g. can you reduce your warehouse delivered to 1 day a week instead of three. Can you look at buying groups like VetCel to consolidate your purchases or Covetrus Online Ordering?

Watch our video with [Rory the Vet](#) on sustainability. Hear his stance on being sustainable and creating 'green teams'. Also visit [Vet Sustain](#) for more information and help on sustainability specifically within the veterinary industry.



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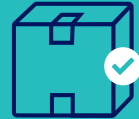
Resources

Do you have assigned roles within your team-members?

Thinking about your point person in doing stock-take or establishing a rota can help spread the workload as well as accountability, skillset improvements and development opportunities.



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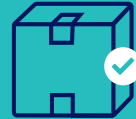
Resources

How often do you conduct a stock-take audit?

We suggest you avoid the pain of doing an annual stocktake mandated by accountancy and compliance. It's more helpful for your clinic to spread the responsibility of doing a stocktake for up to 30 mins-1 hour of each clinical room or storage cupboard. And by having all staff trained, you can rotate the responsibility so that it is not so much of a burden or you can have a point person so that you know it is taken care of.



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Q7

Q8

Resources

Do you have any reporting mechanisms or tools in place to help manage your Key Performance Indicators (KPIs)?

Having this can help you set financial or stock management targets as well as reduce the number of missed billing opportunities. Do you record sales at the right time which instantly reflect your stock levels as soon as something is sold?



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Q8

Resources

Resources:

- [View Case Study](#): How RxWorks cuts stocktake in half and provides real time reporting for Duncan McGinness Veterinary Surgery
- Watch our [Stock Management and Sustainability Webinar](#)
- Read our '6 Key Factors to Ensure Veterinary Practice Success' [Blog](#)

Get S.M.A.R.T.E.R (by Simmons Inc)

- **S**trategize – Establish inventory, management roles, prioritize, organize, develop budget.
- **M**inimize – Managing turnover, appropriate quantities and reordering.
- **A**ccountability – Use practice management software and other tools
- **R**eplenish – Optimizing replenishment- purchasing, receiving, and returning.
- **T**rack – Maintain accurate tracking of what is in your clinic. Conduct a proper cycle count.
- **E**ngage – The whole clinic team should buy-into and be involved in inventory management.
- **R**etail – Understand markup, margin, pricing and merchandising in your clinic.

Get in touch with our team to discuss how we can help you with your stock management



Section 3:

Integrated partners, systems and tools.

This section is straightforward. We want you to think about your ideal practice. If money and budget wasn't an issue – what systems would you like talking to each other? We encourage you to be limitless as this will help you identify your core values, needs and how you want your practice to run.



Section 3:

Integrated partners, systems and tools.



Q1

Resources

This section is straightforward. We want you to think about your ideal practice. If money and budget wasn't an issue – what systems would you like talking to each other? We encourage you to be limitless as this will help you identify your core values, needs and how you want your practice to run.

Can you identify anything in your practice which you would like to 'connect' to any other systems? For example integrated payments, blood machines, diagnosis technology etc. List out everything that you would like to be part of an 'ecosystem'.



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Integrated partners, systems and tools.



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Q1

Resources

Resources:

- Review [Covetrus Connect](#). This gives you an idea of what having a PMS can help you with and all the partners we offer integrations with.
- Find out more about our [Connect Program](#)
- Watch our [video with @Christhevet](#) on his view of integrated technology.

“We have quite an intuitive practice management system (PMS) that has integrated diagnostics, so I can quite quickly send an owner an email with the blood results and brief description. If I'm describing that on the phone and chanting numbers, stats etc, that doesn't sync in with the client. Whereas if they're given graphics, it makes it easier for them to understand. The PMS makes it much easier to see results instantly where I don't need to run to the x-ray machine or blood machine when time is short, which makes a huge difference”

– Chris Wilson, Vet and TV personality, The Neighborhood Vet.

Get in touch with our team to discuss how we can help you create a seamless, unified ecosystem.



Section 4: Insights and Analytics

This section enables you to look at your current Key Performance Indicators (KPIs), mandatory/non-negotiable KPIs and ideal ones. Again, it can be easy for your clinic to avoid doing ‘post-mortems’ on your numbers and performance because a) you have no time and b) you might be thinking that your clinic has never been busier and doing just fine! Especially with the pandemic and huge acquisition of pets in almost every country. Demand has never been higher before. But it isn’t just about demand and generating revenue. It’s the quality of care, the value of your practice and how you connect with your clients and animals. It doesn’t have to be complicated or overwhelming, you can keep it simple.

You can’t improve what you don’t measure. So let’s begin.



Section 4:



Insights and Analytics

This section enables you to look at your current Key Performance Indicators (KPI's), ideal KPIs and mandatory/non-negotiable ones. Again, it can be easy for your clinic to avoid doing 'post-mortems' on your numbers and performance because a) you have no time and b) you might be thinking that your clinic has never been busier and doing just fine! Especially with the pandemic and huge acquisition of pets in almost every country. Demand has never been higher before. But it isn't just about demand and generating revenue. It's the quality of care, the value of your practice and how you connect with your clients and animals. It doesn't have to be complicated or overwhelming, you can keep it simple.

Q1

Q2

Resources

What are you currently measuring?



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Insights and Analytics

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What would you like to measure but can't, and why?



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Q1

Q2

Resources

Resources:

Top 10 KPI's every veterinary practice should monitor, from [Tracy Dowdy](#). Remember it doesn't have to be the full list. It can be tailored to your specific practice and values.

1. Total practice revenue
2. Revenue centres as a percent of total revenue
3. Expenses as a percent of total revenue
4. Total practice transactions
5. Practice average transaction charge
6. Total active clients
7. New clients
8. Client and patient visitation ratios
9. Doctor and staff production
10. Staff/doctor ratio and operational productivity

Get in touch with our team to discuss how we can help you define, create and set KPIs as well as what tools you can use for analytics and performance.



Section 4:

Insights and Analytics



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Resources

Resources:

A DMV article, reminds us WHY it's important. If you ask yourself why a particular KPI is important, it will reveal much more to you as a business owner or practice manager.

Splitting into Leading and Lagging KPIs.

Leading KPIs are best described as metrics that can help you see into the future, such as client satisfaction or number of unique new clients. Lagging ones are easy to measure such as profit or revenue numbers. Leading KPI's tend to motivate teams and staff more.

Keep your KPIs and performance objectives SMART (specific, measurable, achievable, realistic and time-bound).

This is a common tactic in all commercial institutions or businesses, always remember to be SMART when you're setting any kind of objective and KPI. Watch our Video with @rorythetvet [here](#) and how he does not view making money or being commercial as evil:

"I hate to monetize it, but they're there to spend money. Whether it be the organic dog treats on the shelves or veterinary care, they'll do anything for their pets. We cannot criticize them, and we need to support them and want the best for their pets. The downside is that they expect more. Sometimes we'll struggle to show our care, especially under the stress, but we should be invested in every patient."

– Rory Cowlam, Veterinary Surgeon, The Neighbourhood Vet

Celebrate all wins and small wins

If you monitor your KPIs and there are standout numbers, small or big wins, it's a great thing to be able to celebrate those and communicate it with your staff. This has a lot to do with staff retention, staff satisfaction and motivation. And if anything, it will continue to facilitate a very high-performing culture and environment. Keeping an eye on those numbers is what will shape your business and allow your clinic evolve and make better decisions.



Section 5: Staff Acquisition, Training and Satisfaction

This section is all about the centre of your clinic: the people. Your staff are the most valuable asset you have so it makes sense to invest most of your time in the acquisition, training, motivation and happiness levels amongst your clinic. Whether it be about onboarding, integrating new staff, training them on policies, new updates or new technology and professional development, there's a lot to think about. Learning and training is a key part of your staff's skillsets, development, satisfaction and morale levels, as well as their interactions with customers and ultimately the standard of care your clinic offers.



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Q1

Q2

Q3

Q4

Q5

Resources

What are your current recruitment processes? Do you do it all in-house or consult with veterinary recruitment specialists?



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Q1

Q2

Q3

Q4

Q5

Resources

Do you have any onboarding structures in place?



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Q1

Q2

Q3

Q4

Q5

Resources

Do you train your staff?

If yes, how often do you train them?



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Q1

Q2

Q3

Q4

Q5

Resources

Are you training them in:

Most of the time clinics will be fulfilling the medical and technical skills part, because it's required for the job and compliance driven. For everything else and softer skills, not so much. You might consider how investment in this area can help to significantly improve matters for everything, for example in mental health, how much of your staff are doing mental health first aid course? In our [video with @christhevet](#), he says:

"I felt like I'd just been in therapy for two days, I found it SO useful on a personal level in terms of identifying stress and learning about what you can bring to a team. It might be a communications course or something interpersonal and you really can gain a lot from these environments." Chris Wilson, Vet and TV personality at Neighborhood Vets, London



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Q1

Q2

Q3

Q4

Q5

Resources

What format do you and your team prefer to learn in:

e.g. webinars and self-serving online training, knowledge portals etc

The resources on the next page will also outline very useful resources for onboarding, training, templates and more.



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Q1

Q2

Q3

Q4

Q5

Resources

Resources:

- Onboarding that will set you apart [here](#) by Veterinary Practice News
- Onboarding essentials [here](#) by DMV 360
- Read more about [Covetrus Training Solutions](#). Learning Journeys are a great means of training new staff and updating knowledge for even more experienced members of staff.
- Mental Health and Wellbeing
 - Watch our free Love your Pet, Love your Vet Webinar with [Dr. Nadine Hamilton on a Mentally Health Workplace](#), a best-selling author on "Coping with Stress and Burnout as a veterinarian"
 - Watch [our videos with key influencers and vets](#) on their coping mechanisms dealing with stress.
- View our [eBook on Change Management](#), a guide on how you can help your team navigate any significant changes.

[Get in touch with our team](#) for consultation on training.



**Ready to take the
next step?**

[Download our eBook on Taking your Practice Digital](#). Learn more about why a practice management system is critical and think about digitizing your clinic.

Worried about change and adoption of technology? You can also [download our eBook on Change Management](#) and talk to a member of our team on financing options. We often have flexible financing for start-ups or if a clinic needs a bit of help budget-wise. Don't miss out on our exclusive discounts today!

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