

Technology Tools Every Practice Needs

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Meet Your Consultant



Best known as the “Queen of Scripts,” Wendy S. Myers, CVJ, has taught communication skills for more than 2 decades. As founder of Communication Solutions for Veterinarians, she is an online course creator, keynote speaker, and key opinion leader for pharmaceutical and laboratory companies. Wendy teaches practical skills through online courses, onsite and virtual consulting, and conferences. Wendy was a partner in an AAHA-accredited specialty and emergency hospital for 5 years. She’s authored 6 books and a business builder column for *Veterinary Practice News* magazine for 11 years. Wendy is a RACE continuing-education provider. Visit csvetscourses.com to learn more.

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What you’ll learn:

- Shortcuts to communicate with clients with texts and app messages
- Faster ways to update electronic medical records
- Speed up your prescription refill process
- Quickly communicate with your entire hospital team or individual employees

BONUS: Facilitator’s guide to implement the training

You’re short-staffed with excessive appointment demands, 800 calls a day, and clients who are more demanding than ever. Get advice from hospital managers who discovered game-changing technology tools that improve efficiency and employees can’t do without.

Shortcuts to communicate with clients with texts and app messages

Tech Tool: Texting platforms

You call a client about her cat’s lab results and leave a detailed voicemail, explaining that you need to discuss the diagnosis and treatment. After two days with no response, you leave a second voicemail.

Even if clients have your hospital’s phone number saved in their contacts, research shows 67% don’t listen to voicemails.¹ Why? Clients can’t skim voicemails. They must listen to the entire message, call back, wait on hold, and leave a message because the veterinarian isn’t available. Worse yet, clients don’t understand veterinarians’ chaotic, high-stress schedules.

Text is a better choice. Text dialogue can happen asynchronously. Both parties don’t have to be on their phones at the same time. Veterinarians and clients can reply when they’re available. Up to 80% of callers choose texting over voicemail.¹ Millennials are the largest pet-owning segment and 60% prefer to communicate with businesses via text.^{2,3}

Let’s end your frustration with unreturned calls and phone tag. Turn your callbacks into “textbacks.” Texts rarely go unread or unanswered. Ditch the 15-minute task of calling and leaving a voicemail. Replace it with a 2-minute text.

Top veterinary app providers with text and messaging include:

- AllyDVM, www.allydvm.com
- Otto (formerly TeleVet), <https://otto.vet>
- Pet Desk, <https://petdesk.com/communications-solutions-for-veterinary-practices/>

- Vet2Pet, <https://vet2pet.com>
- VitusVet, <https://vitusvet.com>

Create timesaving templates in your texting platform for these common responses:

Text After Discharge

After each hospitalized patient is discharged from surgery, dentistry, or treatment for an illness, your medical team follows up with clients. Set expectations for a textback during the discharge appointment.

SAY THIS: *“You will get a text/app message from us tomorrow to confirm that <pet name> is eating, drinking, and taking medications. If you have questions or concerns, reply to the text, or call us at 555-555-5555.”*

The next day, send a textback.

TEXT THIS: We are checking on <pet name> after surgery yesterday. Is <pet name> eating, drinking, and taking medications? Reply Y for yes or N for no. Reply with questions.

If the client replies “Y,” document the communication in the electronic medical record and reply to thank the client. Some apps writeback to your practice-management software (PMS). If a client replies “N,” call to discuss the pet’s symptoms and next steps. The client’s answers may prompt an appointment for a progress exam or telemedicine consult.

Create a series of text templates when patients require multiple follow up. Text campaigns should notify, educate, support, and steer pet owners. In your texting platform, link the series to trigger in sequential order.

Let’s say you perform a dental treatment with several extractions. Send this series of texts after the dental discharge appointment:

- **1 day later:** We are checking on <pet name> after oral surgery yesterday. Feed a soft food, no hard treats or chews, and refrain from brushing teeth for X days. Is <pet name> eating, drinking, and taking medications? Reply Y for yes or N for no. Reply with questions.
- **4 days later:** <Pet name> may eat regular food now. No hard treats or chews for X days after oral surgery. Reply with questions.
- **7 days later:** You may gently brush <pet name>’s teeth with pet toothpaste and a soft toothbrush now. Click here <link> to watch our video on how to brush your pet’s teeth. Reply with questions.
- **14 days later or based on next appointment date:** <Pet name> has a progress exam to check on healing from oral surgery on <date, time>. Reply C to confirm or RS to reschedule.

Text After Sick Outpatient Exams

Let’s say you saw an urgent care patient for loose and watery stools. You determine the gastrointestinal upset was due to high-fat table scraps at the family barbeque, and radiographs confirm no bones were ingested. You prescribe medication and instruct the client to feed a bland diet for several days. The outpatient technician who assisted the veterinarian with the exam will be responsible for follow-up communication.

TEXT THIS: We are checking to see if <pet name> is feeling better. Feed a bland diet for X days. Is <pet name> having normal stools and a good appetite? Reply Y for yes or N for no. Reply with questions.

The client already has a relationship with this technician, who is familiar with details of the case. If the health concern has not resolved, schedule a progress exam.

Text Preventive Lab Results

Share lab results for intestinal parasite screens that you send to your reference lab. I provided consulting and onsite training for a 10-doctor hospital where the medical team told clients “No news is good news” for intestinal parasite test results. Being busy isn’t a good excuse and may harm compliance for preventive diagnostics. Pet owners are paying to learn results. Clients will be more likely to accept screening in the future if they understand today’s results.

Text clients about negative results and reinforce timely dosing of preventatives. Call clients about positive results so you may discuss treatment and medication.

TEXT THIS: <Pet name>’s intestinal parasite screen was negative with no egg cells or parasites seen. Give <brand> each month for heartworm and intestinal parasite prevention. Click here to view lab results <link to patient portal on your website>. Reply with questions.

Text as a Backup to Voicemails

A client calls and tells your client service representative (CSR), “Someone from your hospital just called me. What do you need?” While you might find the answer in the electronic medical record, the staff member may not be available.

Whenever you leave a voicemail, send a backup text to lead the client to listen and promptly call back. Your text should include the best time to return the call based on the staff member’s availability.

TEXT THIS: “Dr. <Name> left you a voicemail about <pet name>’s lab test. Please listen, and then call 555-555-5555 to discuss the diagnosis and treatment. Dr. <Name> will be available between 2:00 and 2:20 p.m.”

Veterinarians need administrative time blocked in their schedules to review lab results, update medical records, approve prescriptions, and call/text/email clients and vendors. Learn how to add doctor-client communication blocks so veterinarians can batch tasks. Read my blog on “Overwhelmed With Callbacks, Texts, and Emails?” (<https://csvets.com/overwhelmed-with-callbacks-texts-emails/>).

Clients will get cranky if they leave multiple messages without returned calls. Watch my 2-minute video on what to say when a client demands to talk with the veterinarian, but he isn’t available. View “I need to talk to the doctor now!” at <https://www.youtube.com/watch?v=H9ws0n6VdeM&t=18s>.

Have a doctor and technician list the top callback scenarios at your hospital. Identify which callbacks could be converted to textbacks. You will improve your team’s productivity and increase response rates from clients. Write templates for your texting platform to save time and have consistent messaging.

Faster ways to update electronic medical records

During an onsite consult, a doctor told me that he spends 2 hours every night finishing records after his hospital closes. He’s tired of missing dinners with his wife and daughter. What if he could cut recordkeeping time in half and improve his notes?

Dictation software that recognizes veterinary terms or a text expander app will help him update records and get family time back. Here are stories from two veterinarians who use these game-changing technologies. Their technicians and client service teams love the timesavers, too.

Tech Tool: Dictation Software

Talkatoo has speech-to-text capability that lets you capture chart notes faster than typing or writing. The dictation software works with all PMS. Talkatoo is an app that you download on your desktop or laptop computer with an internal or external microphone. Choose “start dictation” to begin and “listening” to stop. The dictation software works like an alternate keyboard. Just open a document, email, or web browser

and click in the field where you would normally type. Talkatoo has veterinary terms. Monthly fees are based on the number of users (<https://talkatoo.com>).

Dr. Jeff Goodall, owner of Sunnyview Animal Care Center in Bedford, Nova Scotia, Canada, uses the dictation software to leverage his team's ability to see more clients in a shorter time (<https://youtu.be/fnVwVeqDQK8>).

Dr. Lois Ann Malphrus sold North Greenville Animal Hospital in Greenville, South Carolina, to a corporate group and is working for a few years until she retires. The new owners transitioned from paper to paperless records. With more than 38 years in practice, Dr. Malphrus admits she struggles with typing skills. After seeing an ad for Talkatoo, she asked the hospital's new owners to try it. Owners purchased five licenses for doctors and staff. In addition to dictating notes, Dr. Malphrus uses Talkatoo when calling clients. She calls clients on a speakerphone, opens the electronic medical record on her computer, and clicks start and stop on the Talkatoo app. The client conversation is dictated into the medical record.

Tech Tool: Text expander apps

How many times have you typed "flea allergy dermatitis" in a record today? Stop typing the same stuff over and over. The team at Eastgate Veterinary Clinic in Corvallis, Oregon, uses TextExpander, which takes a short amount of text and expands it into a longer description (<https://textexpander.com>). You will set up keyboard shortcuts and corresponding templates. With a few keystrokes, your text automatically expands to words, paragraphs, or messages with images.

When doctors or technicians type the word "flea," TextExpander automatically populates the full description for flea allergy dermatitis and the workup process. Templates help your team type consistent notes without typos or grammar mistakes. TextExpander works with Windows PCs, Macs, iPads, email platforms, and phones. Its online public groups let users share templates by industry and topics.

In addition to recordkeeping, your client service team can use TextExpander to reply to clients' emails and texts. Templates can include fields where you personalize correspondence with client and patient names, drug names, and other data to tailor communication. Templates, called "snippets," are save to the cloud so the current content is available on all your devices. TextExpander tracks time savings with user reports. Watch a 1-minute overview of TextExpander on YouTube at <https://www.youtube.com/watch?v=H8kuNxoZgH8>.

Tech Tool: Scanner

Your client service and medical teams handle loads of paper every day. Start scanning and storing digital documents in your PMS to get to paper light or paperless. The team at American Animal Hospital in Persia, Iowa, uses a Fujitsu scanner to scan records and patient histories from other hospitals, reports from emergency and referral hospitals, and more. Once scanned, they attach PDFs to electronic medical records in their PMS. American Animal Hospital has one scanner at the front desk and a second in the treatment area. The device can scan 40 pages per minute, has a feeder capacity of 50 pages, does two-sided scanning, and offers WiFi and USB connectivity (https://www.amazon.com/dp/B08PH5Q51P?ref=emc_p_m_5_i&th=1).

Tech Tool: Online Forms

Clients take 20 minutes to complete most pen-and-paper forms compared to online forms in less than 10 minutes.⁴ Set up a specific email such as records@yourvet.com so this timely information doesn't get lost or buried in your hospital's general email. CSRs add information to electronic medical records.

Animal's Choice Veterinary Clinic in Iuka, Mississippi, uses JotForm for consent forms with electronic signature capture (<https://www.jotform.com>). The hospital has online forms for new patients, anesthesia consent, boarding, and grooming (<https://www.animalschoicevet.com/online-forms>). Clients complete and sign forms and click "submit," which emails information to the hospital.

Lake Road Animal Hospital in Horseheads, New York, includes links to online patient history forms in appointment confirmations (<https://lakeroadanimalhospital.com>). Clients are asked to complete and submit forms 24 hours before scheduled appointments. Received forms are added to patients' electronic medical records. Online forms have replaced 10-minute histories that technicians once took. Doctors review completed forms before appointments and prepare follow-up questions. Online forms save the medical team save 2 hours, 40 minutes of taking histories per outpatient doctor-technician team.

Create online forms based on the reason for visit such as:

- Anesthetic/surgical consent
- New clients
- Checkups
- New puppy/kitten
- Technician appointments
- Progress exams
- Sick patient visits

Speed up your prescription refill process

Veterinary hospitals get 50 or more prescription refill requests a day. Clients wait until the last pills are gone and need "emergency refills" today. Veterinary teams average 3 hours a day to process prescription requests from third-party online and retail pharmacies, sucking precious time away from patient care and giving away your income.⁵ Pharmacy sales represent 25% to 30% of revenue in companion animal practices.⁶

Send refill reminders to keep more of your pharmacy revenue. Lead more clients to opt-in for text reminders because texts have a 99% open rate.⁷ Healthcare emails have a 24% open rate.⁸

Tech Tool: Use text, app, and email to send refill reminders

If your hospital already has an online store, your veterinary distributor is sending refill reminders to clients who have previously ordered. What if only 10% of your clients are using your online store? The other 90% aren't getting refill reminders!

Here's how to set up refill reminders so every client gets prompted to repurchase from you:

Step 1) Identify top-selling drugs. Run a pharmacy sales report in your PMS. Sort data from highest to lowest dollars to prioritize the order of setting up refill reminders. Parasiticides represent the largest market share of pet medications with 59% of sales.⁹

Start by setting up refill reminders for the top three drug categories:

1. Flea/tick preventatives
2. Heartworm preventatives
3. Long-term drugs for chronic conditions (NSAIDs, allergies, insulin, heart drugs, etc.)

Step 2) Create refill reminder templates. Write a reminder for each brand so you may promote rebate and reward programs. Write text/app and email templates in your PMS, which will sync with your third-party reminder service. See page 2 of this handout for veterinary app providers.

Reminders should include the drug name, purpose of the medication, preferred pickup method, and rebates. Promote rebates, which reinforce why clients should buy drugs directly from your hospital. Instant rebates can be applied whether clients buy in-clinic or order through your online store.

Pharmaceutical companies including Boehringer Ingelheim, Merck, and Elanco use Greenline Pet to manage instant rebates and coupons (www.greenlinepet.com, 866-608-9038). Your hospital will set up a



Greenline Pet account to apply instant rebates and coupons. Your hospital will receive reimbursement checks weekly for rebates and coupons that have been submitted through the Greenline portal. Instant rebates on Greenline's platform have saved clients an average of \$8,000 per hospital.⁹

Here are templates for heartworm preventative refills:

TEXT/APP THIS: <Pet name> needs a refill of <brand> for heartworm protection. Click here to refill in our online store with home delivery OR reply Y to get curbside pickup at our hospital. Get \$__ instant rebate when you buy 12 doses of <brand>.

When setting up email templates for refills, have a powerful subject line and concise message. Because people skim as they read emails and may be viewing messages on the smaller screen of a cell phone, write email templates with bullets or lists. Your email should include graphic elements such as "Download app" and "Order online" buttons. These stand out and make it easy for clients to act with one click. Include hyperlinks to your online store or to download your hospital's app.

The email subject line has three important components:

1. Put the pet's name in the email subject line to increase open rates. The data field will grab the pet's name from your PMS to customize all text and email communication.
2. Explain the purpose of the drug that needs to be refilled (i.e., heartworm prevention, arthritis, and pain management).
3. Have a call to action with "click to order."

Using emojis in subject lines can increase open rates by 56%.¹⁰ Get free emojis at <https://getemoji.com>.

EMAIL THIS:

Subject line: <Pet name> needs a refill of heartworm preventatives 🐾 Click to order

Email message: <Pet name> needs a refill of <brand> for heartworm protection. Get a refill 3 easy ways:

- 1) Order online with home delivery. Rebates will be applied at checkout.
- 2) Pick up at our hospital. Reply to this email with "pickup" in the subject line. We will email you when your medication is ready and send a link to pay.
- 3) Order through our app with home delivery or pickup at our hospital.

Get \$__ rebate when you buy 12 does of <brand>.

[Order Online](#)

[Download App](#)

Here are refill reminder templates for non-steroidal anti-inflammatory drugs (NSAIDs):

TEXT THIS: <Pet name> needs a refill of <brand> for arthritis and pain management. Click here to refill in our online store with home delivery OR reply Y to get curbside pickup at our hospital. Get \$XX instant rebate when you buy XX tablets of <brand>.

EMAIL THIS:

Subject line: <Pet name> needs a refill of arthritis medication 💊 Click to order

Message: <Pet name> needs a refill of <brand> for arthritis and pain management. Get a refill 3 easy ways:

- 1) Order online with home delivery. Rebates will be applied at checkout.
- 2) Pick up at our hospital. Reply to this email with "pickup" in the subject line. We will email you when your medication is ready and send a link to pay.
- 3) Order through our app with home delivery or pickup at our hospital.

Get \$XX instant rebate when you buy <brand> in 30 tablets, \$XX rebate on 60 tablets, or \$XX rebate on 180 tablets.

[Order Online](#)[Download App](#)

Step 3: Turn on refill reminders in your PMS, which will sync with your third-party reminder system. Open the inventory module and turn on reminders for medications that will need refills. For example, the Otto app syncs with your software every 1 to 3 minutes and is compatible with most PMS (<https://otto.vet>). Rapport from Covetrus integrates with its software, including AVImark, ImproMed, and cloud-based Pulse (<https://software.covetrus.com/veterinary-solutions/rapport-veterinary-communication-software/>).

Your hospital or inventory manager will invest 1 to 2 workdays to set up refill reminders for your top-selling drug categories. Most hospitals see sales of preventatives double. Best of all, more patients will get the timely medications they need. The investment will result in \$10,000 per month or more in additional pharmacy income. Great return on your time investment, right?

Tech Tool: Use email folders to track the prescription refill process

Have your team write each step of the refill process to identify where they could make efficiency improvements. Use technology tools to avoid lost refill requests. You can use email or a message center that's part of your PMS. Many email platforms use folders, which are like drawers, where you store emails so they don't clutter your inbox. Create folders for specific emails such as pending RX approvals, completed RX, appointment requests, confirmed appointments, boarding requests, and more. Gmail uses labels instead of folders to categorize email messages. Use "move to" in the navigation bar to select the appropriate label or to create a new one. Learn about Gmail folders at <https://bit.ly/3JXwDtV>.

A client gets an email for a refill reminder and replies "pickup" for in-clinic or curbside pickup. Refill reminders sent by email will come from a specific email address that you set up such as pharmacy@yourvet.com. Replies will go to this same email, which technicians and assistants will monitor and process in-clinic orders.

Map the steps for an efficient refill:

1) Client calls to request in-clinic or curbside pickup of medication. CSR connects the call to the pharmacy phone extension, or clients press the option number on your phone's auto attendant.

When technicians or assistants are in the pharmacy, they will answer calls. If unavailable, the client will get a voicemail message. Your recorded greeting says, "You've reached <Your Veterinary Hospital>'s pharmacy line. Please leave your name, your pet's name, the prescription you need to be refilled, dosage, and phone number. Leave your cell number and let us know if we may text you when the refill is ready. We will review voicemail messages at 10 a.m., 12 p.m., 2 p.m., and 4 p.m. Thank you!"

If the client responds to an email refill reminder, set up an email autoresponder that pharmacy@yourvet.com is checked every 2 hours. Sample autoresponder: Thank you for contacting <Hospital Name>'s pharmacy. We will review email messages at 10 a.m., 12 p.m., 2 p.m., and 4 p.m. and will respond to your request within 24 hours.

2) The technician supervisor will assign technicians and assistants to check pharmacy voicemails and emails daily. Process prescription refills in batches at the four designated times.

3) Technician verifies the reason for the refill and confirms the patient has had a physical exam within 1 year and any applicable drug-monitoring tests.

If all answers are yes, technicians refill the medication and text or email the client based on the client's communication preference.

Doctors and technicians also can enter the number of refills available or refill until <date> in the PMS. Let's say a client buys 6 doses of heartworm preventatives. The technician will note 6 refills are available when entering and refilling the prescription. The next refill is preapproved for 6 doses. The client will receive a reminder to schedule an exam, heartworm/tick test, and applicable preventive services as the 12-month cycle nears. The prescription renewal occurs at the next checkup.

TEXT THIS: We have refilled <brand> for <pet name>'s heartworm prevention. We applied an instant rebate of \$XX for purchasing XX doses. Click to pay \$XXX and get a receipt. Park in our curbside pickup spot and text us when you arrive.

Identify which refills require doctor authorization. If the refill is for an antibiotic, controlled drug, or unusual request, the technician forwards the email request to the veterinarian who last approved the medication. If the doctor is off today, prescription requests that must be filled the same day are forwarded to another veterinarian.

After forwarding a prescription approval to the veterinarian, the technician will move the email to a "Pending RX Approvals" folder. Once a doctor has authorized the refill and the technician has filled it, the technician will move the message to the "Completed RX" folder and email the client pickup instructions. Get the folder for "Pending RX Approvals" to zero each day.

4) Designate a parking spot for product pick up. Just as restaurants have reserved parking for to-go orders, do the same for pet owners picking up medication and food. Choose the parking spot next to your handicapped parking, which is nearest your front door. You will minimize the number of steps that employees must take for curbside delivery. This parking spot also will have higher turnover with clients parking for 5 to 10 minutes. Clients will text/app message you when they arrive.

5) Have clients pay through an app. Having clients pay through an app on their smartphones can eliminate the need to purchase mobile credit card devices, which can cost \$600 each. Choose an app that offers multiple features, so you don't have to hire one vendor for reminders and another for payments. Two comprehensive apps that accept payments are:

- **Otto:** The platform is compatible with AVImark, ImproMed, IDEXX Cornerstone, IDEXX Neo, ezyVet, Pulse, and eVetPractice. Schedule a demo at <https://otto.vet>.
- **VitusVet:** This platform works with Advantage+ Integration, AVImark, Clientrax, Cornerstone, DVMax, eVetPractice, ImproMed, Intravet, Vetter, and VIA. You send a personalized text to the client with a link to pay. The link takes the client to a payment screen where she will enter her credit card information for the amount you specify. Request a demo at <https://vitusvet.com/request-a-demo/>.

Tech Tool: Pill-counting app

I had a pill-counting contest with a technician during an onsite consult. The technician and I each counted 30 pills at the same time. The technician had to start over three times after co-workers interrupted her with questions. I counted 30 pills in 1 second. How? Watch my 2-minute YouTube video on "How to Speed Up Your Refills" at <https://youtu.be/evd11pownHw>.

I used the free Pill Eye app on my phone. Just put the medication on the pill counting tray, open the app, and snap a photo. Get your quantity in one click, not the time-suck of hand-counting pills. Plus, Pill Eye has 99.9% accuracy (better than a human). Download the Pilleye app for iPhone at <https://apps.apple.com/app/mediscount-counting-pills/id1537039316?l> or Android at https://play.google.com/store/apps/details?id=com.rocateer.mediscount&hl=en_US&gl=US.

Besides daily pill counting, this app is a game changer when you have inventory checks. Pilleye can count pills and capsules of all shapes and sizes.



Quickly communicate with your entire hospital team or individual employees

Whether you have a staff of 5 or 50, everyone needs to know about upcoming staff meetings, employee benefits, birthdays, anniversaries, CE events, and so much more. Apps and texts are faster ways to communicate with your team or individual employees compared to emails.

Tech Tool: Communication apps for your team

Slack is a communication and project-management app for businesses that works on mobile phones, tablets, and computers. (<https://slack.com>). Slack offers group and direct messaging, calls, and video calls. View messages, files, channels, and people in your Slack group. Use “channels” for projects and processes, which let you add all employees or choose individuals. For example, you may create channels for “prescription refills,” “client service team,” “technician team,” “marketing,” and “leadership team.” Channels can be public or private, letting only invited members participate.

You can send a direct message to a team member or group and ask if they have completed a specific task. They can reply, use a completed emoji, or leave a reaction. Users can change their status to “active,” “in a meeting,” “commuting,” “out sick,” “vacationing,” or “working remotely.” You can integrate Slack with your Google Drive, Google Calendar, Trello, Asana, and other apps. Slack offers a free and paid monthly subscription. You can invite guests or have secure collaborations with consultants and vendors.

GroupMe is a mobile group messaging app from Microsoft (<https://groupme.com/en-US/>). You can have a free, private chat room for employees. GroupMe works on every phone, tablet, and computer. You don’t need the GroupMe app to chat. You can add anyone from your contacts to chat with the group. You also can send direct messages to individuals. Users can connect several ways, including through Facebook, email, or Microsoft login. You can send text, videos, photos, and calendar events. Watch this review of GroupMe on Youtube: <https://www.youtube.com/watch?v=nJ9YSf5Qd0Y>.

Which goals will you implement from this training?

1. _____
2. _____
3. _____

Facilitator's Guide: Technology Tools Every Practice Needs

Choose a facilitator to lead your team's discussion. Create plans to implement goals you learned in this training program.

1. Which text and email templates will you create for common inquiries and responses?

2. Which technology tools will you use to improve internal communication among employees?

3. Which technology tools will veterinarians, technicians, and assistants use to have efficient medical recordkeeping?

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