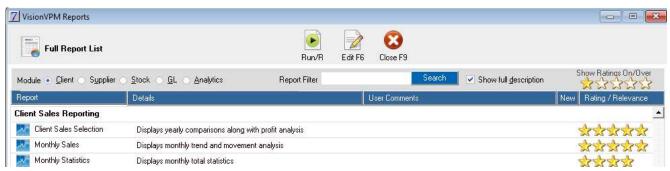# Getting your business back on track using VisionVPM

As you bring your practice out of lockdown, now is the time to start considering whether all the adapted measures are sustainable and how some of VisionVPM's features can be utilised more efficiently as we all adapt to the new normal.

Review your Current State

Understand how your bottom line has been affected over the last few months using some basic reports.

Client Sales Reporting

You will find the following under the Reports Menu > Client > Client Sales Reporting

- **Client Sales Selection Report** will compare this year to last year.
- M**onthly sales report** will give you a monthly breakdown for the dates specified
- **Monthly statistics report** will break this down further with the sales per month, number of sales and the average Sale

When running these reports, you can choose any date range and a number of other fields like Vet, Species, even client suburb.

Whichever way you run them, these reports will give an idea of trends and areas you might like to focus on.

VPM Analytics

If you prefer your reports to be a bit more flexible, you might like to use the VPMAnalytics found under the Reports menu instead.

You can run the Client Sales reports within a pivot table giving you the option to turn on or off different fields, change the date range and even save these settings for future reference.

Work Summary

The Work Summary will display the number and average of invoices and receipts per day with a total at the bottom for the date range run. You can run this for any date range you choose but just be aware that the greater the period, the longer it will take to generate.

If you are looking to improve your overall average invoice amount, this is where you will get your measurements from
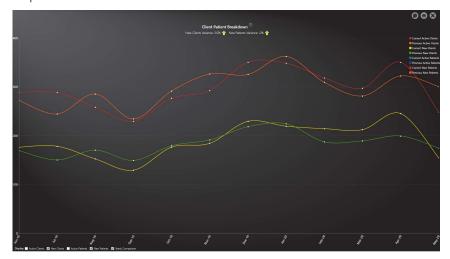
Just be aware that these figures include GST where the sales reports above do not.

New Clients and Patients

Another number you should be familiar with in your New Clients and Patients. This can be tracked either via:

- Reports Menu > Client > Client Patient Monthly activity
- Reports Menu > VPMDashboard > Client Patient Breakdown

Changes to your Workflow

Online Appointments

If you have an online appointment booking facility at your practice, what changes did you make?

Did you disable this function during some of the harsher lockdown restrictions?

Did you add, change or remove any booking reasons? How about the emails generated from these bookings? Did you add information or links to COVID-19 related procedure changes perhaps?

In some cases, these changes may still be valid but just be mindful of any that are not and make a plan to change these in the future. When and what changes you make are entirely specific to your practice.

If you do not have an online booking facility via your website that integrates into VisionVPM, please give our VisionVPM Service Desk a call to discuss your options.

Virtual Visits

If you chose to offer virtual visits, consider doing so on an on-going basis, even if it only for specific circumstances.

If you have not gone down this road yet, virtual visits can provide wide-reaching benefits such as:

- **Convenience to your staff and business** because you do not necessarily even need to be in the building to provide your services. You can offer additional consult times even if you do not have the consult rooms available. This can enable staff to work from home or even on a part-time basis with flexible hours. Remember, this doesn't just apply to vets but nurses too.
- **Convenience to pet owner** as they don't need to worry about getting their pet in their carry cage, into the car, getting to the clinic on time for their appointment. This can also help to eliminate white coat syndrome
- Provide **timely and personalised** access to veterinary advice when most needed such as in an emergency or as triage
- **Stay connected** with your clients when they are unable to come into your clinic. There could be a number of reasons for this such as: the client or animal may be unable to travel, perhaps you want to see their home environment, Or maybe the patient is already with you and you would like to give the client an update.
- If you are currently offering an **after-hours service**, virtual visits could be an alternative to home visits if physical examination is not necessary avoiding travel and even some potential safety concerns if you get a call out late at night

Applications of Virtual Visits include but are not limited to:

- A Medical consultation. This is the most common type of virtual visit everyone thinks of.
- Emergency or triage situations. How bad is it? Can it wait or do we need to come in right now?
- You might consider offering consults where you take the animal into a consult room or out the back without the client but offer them the ability to still watch and interact with you during the examination
- Sometimes you might prefer to see the patient in their home environment particular in the case of a behavioural consult. What are they like with the other members in the household? Or other animals?
- If you board pets or even just simply have a patient stay overnight, you could a 'say goodnight' service where a staff member takes a camera into the cages
- When a patient is ready to go home, the Post-op discharge consult could be held virtually while the client is still at home or at work. Personally, I think this is a great idea to avoid the afternoon rush and minimise the time the client is in the clinic when they just want to take their pet home. Also, handy if the person collecting the animal is not the primary client but rather the husband, wife, or another family member.
- And then, after a few days rather than a post-surgery follow-up call by one of your nurses, how about a virtual visit to check those wounds? Book it in as an appointment.
- There will be times that the primary client or other family members cannot be present at important times of their pet's life. For example, the patient to be euthanised and the circumstances means all the family members cannot be present in person but you could still give them the opportunity to say goodbye.
- How about a virtual Puppy Preschool? Your team could provide virtual classes to provide information and watch how the family members interact with their new pup. This can be great if travel is an issue for the family and means you are not restricted by the physical boundaries of the building and space you have available.

Regardless of the type of virtual visit you are conducting, these can be created from VisionVPM via

- Right-click an existing appointment and click **Create Virtual Visit**.
- From the Appointment Details window, click the **Online Meeting** check box
- From a Clinical Record click the **Virtual Visit** tab and enter the date and time of the virtual visit meeting if different from the clinical record date and time remembering it must be in the future.

Invitations to join a virtual visit can be sent directly to the client via email or SMS from VisionVPM.

Once the visit commences, you will have to opportunity to view the client and or patient, chat with them and even record the video.

If you do not have Virtual Visits enabled in VisionVPM, please give our VisionVPM Service Desk a call to discuss your options.

Appointment Types

It's a great time to review your Appointment Types in VisionVPM. Appointment types enable you to do a number of things such as:

- Colour code the appointment type so it easily identifiable
- Set a default length of time for this type of appointment. You may have even extended some of these so review and ensure they are appropriate for all of your protocols
- Specify the most common reasons for this type of appointment – this can make creating appointments quicker and will populate into the clinical record
- You can link a clinical template to the type or reasons
- Specify the communications associated such as whether to send an appointment reminder text or post appointment message.

Are they any that you do not use? Inactivate them.

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Emailing Documents

Consider sending consent forms or information sheets to your clients prior to their arrival. This can help minimise the time spend in the clinic during arrival or surgery admission.

From any appointment, right-mouse click to find:

- **Print Consent form** for Adhocs and VPMReports
- **New Client Document** and **New Animal Document** for Word Documents

After generation, use the Email PDF options. Same applies when sending the patient home with some after care notes or fact sheets. Consider emailing these instead of printing. Imagine all the paper and printing costs you will save.

Saving Consent Forms

What are you doing with those consent forms after the appointment is all done and dusted?

If they have been returned electronically, we can easily save them against the animal's clinical record it is in relation to via the Attachments button. Either use

- **Attach a selected file** if the file has been saved
- **Open the documents folder** and then click and drag straight from Outlook or Gmail or whatever you are using for your emails.

Even if you are still working with paper consent forms, I would recommend scanning and saving these the same way. They will then be easily accessible if you ever need to reference them in the future.

PimsPix

If you do not have a scanner, do not despair. This is where PimsPix can come in to assist. This is an application you can download and install on any smart phone or tablet that is connected to the WiFi network in your practice.

There is a small amount of configuration required on the server but no cost.

Once setup, use the app to take a <u>new photo</u> or <u>select a photo</u> and then the <u>scan destination code</u> will be enabled.

Each Client, Animal and Clinical record all have a QR Code which can then be scanned using the device with the app.

This can be used for taking pictures of patients, wounds, and any personal items that the patient may have had when they were bought in but you can also take pictures of paperwork so consent forms up front but also cage cards or any anaesthetic monitoring charts used through the stay.

Product Pick-up / Delivery

Did you offer a pick-up or delivery service to your clients? There is no reason you couldn't continue to do so.

In VisionVPM you can track these. Where a clinic has been marked for home delivery and you are entering a client invoice for the corresponding department/clinic, the **Delivery** field will be enabled.

Click the **Delivery** arrow and select **Deliver** if you will be delivering the item. This could be you hand delivering to the client at home or posting. The alternative is **Pick up** where you are indicating the client will come in to collect.

Invoices with any items marked for delivery can be seen on the Clients Menu > **Invoice List** window.

Whether you choose to charge for this delivery service is up to you, but this would be a separate stock item that you may need to setup.

There are three ways you can go about this:

- a simple one-off flat fee
- a series based on rings like within 2kms, 5kms and so on
- Utilise the mileage calculations to charge per km. This requires a few extra steps
  - Insert a stock item for delivery per km. What you choose to charge is up to you but the key here is the 'mileage' tick box
  - On your clients, you will need to start to populate this 'charging distance' field found on the Settings tab. This is typically the kms to make a round trip from the clinic to the primary address.
  - When you charge any stock item that has the 'mileage' tick selected, VisionVPM will populate the QTY field using the data entered in the charging distance field.

If you are offering a home delivery service make yourself an appointment for these delivery runs.
- Create a separate Appointment Type to make these nice and clear. You might even choose to have a SMS template for this appointment type to say something like "your delivery from your local vet is expected tomorrow"
- Go to the Search option and set the Appointment type to your delivery appointment and the date to today.
- Highlight the appointments and go to Maps > View directions to address in Google Maps
- Then you can re-arrange the order of the stops to make the most efficient run. This is a very handy trick if you do house calls or farm runs as well and need to organise your day

Wellness Plans

Wellness Plans are a great tool to promote proactive preventative healthcare which will improve the overall client experience with your practice. Wellness Plans in VisionVPM are a tool for veterinary practices to generate and manage these plans.

A wellness plan is essentially a group of products and services provided to an animal over a period, normally 12 months. These products and services that are a part of the plan are given at a discounted price, or at no charge throughout the duration of the plan.

Wellness plans are sold to the client up front and they can pay the annual fee or in monthly installments over the course of the plan.

After reviewing your New Clients and New Patients dashboard, you may have noticed a bit of a spike. They are going to be the perfect audience for these kinds of plans are they navigate the landscape of being a new pet parent.

You can have a number of different plans. For instance,

- Puppies and Kittens which include things like desexing
- Adult companion animals plans which everything they would need over the year, and this doesn't have to just be dogs and cats – don't forget about horses, Guinea pigs, birds, lizards…
- Senior animals might have a different plan with different items, checks and allowances built in.
- Plans for animals with certain long-term conditions. These do not necessarily have to be discounted but rather a way to manage the treatment over the period.

These might then have different levels of inclusions, like Bronze, Silver and Gold.

Just bear in mind that only one plan can be applied to an animal at a time so try to avoid overlap.
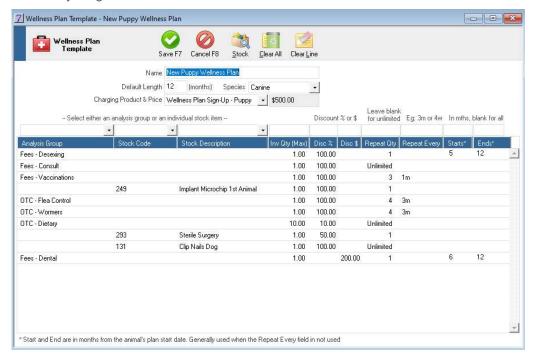
Wellness Plan Templates

To use Wellness Plans in VisionVPM, Wellness plan templates must first be setup before they can then be attached to an animal.

We do this from Maintenance > Look-up lists > Animal Related Lists > Wellness Plans

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Each individual plan can have a combination of products and services – either grouped or individually identified. You can limit the quantity allowed, specify the discount as a percentage or dollar amount and specify an availability range.

When invoicing an item on a plan, a red W will appear on the line followed by the discount. In this case, the castration has an 100% discount.

You will also notice the Wellness Plan button on the right is RED. Select the button to view other eligible items as part of the active wellness plan for this animal.

This assists with ensuring that the client is utilising their plan to the fullest each time they present.

Effective Communications

Communications are an important key to your practice's success and there are a number of tools within VisionVPM that can be utilised to do so.

Keep your Staff informed – Diary

If you are not already familiar with the diary, this is your in clinic "To Do" List.

A diary note may be associated with a client and animal but it doesn't necessarily have to be. Has everyone read this policy.. Could be a single diary note with multiple users added, each that require to update the status.
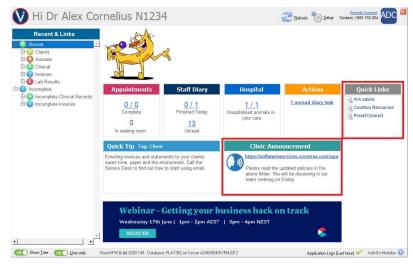
From the diary, also you can send an Email & SMS to clinic personnel

Keep your Staff informed – Homepage

The homepage is another resource that can be used for internal communications.

If this isn't already set to automatically open, you can do so from the Client Menu > Homepage.

You have a "Clinic Announcement" that everyone will see. You can choose to also add a link to a website or file on your network if relevant.

You can also add links to websites that would be helpful to all staff.

From the Setup button, this is where the clinic announcement including URL can be added as well the Links.

Feel free to add your clinic logo and review the other settings here to get the most out of this tool.

Keep you Clients informed

Let your clients know that services have been restored or any procedure changes to expect during their next visit using the **Marketing Schedule** to generate lists of your clients and merge directly to email or text.

For more information, view our guide to **Mass Communications using email in VisionVPM**

Email / SMS Templates

If you made changes to any of your email or SMS templates to reflect any changes in your services or COVID-19 related information via links, you will need to edit these. You may simply choose to amend these or choose to add centralised links to your Facebook or website so you only need to update these in a central location.

You can easily access all your email and text templates via Maintenance > Looks up lists > General Lists.

While you are there, consider whether all the templates are relevant and delete if not

Automated Scheduled Services

There are a number of communications that can be automated in VisionVPM to use these templates from **Maintenance > Look up lists > General Lists > Automated Scheduled Services**

Review what is disabled and enable as desired.

If you have inactivated any individual Automated Reminder Plans, these will also need to be made active.

It's important to note that upon reactivation, reminders are not sent for the missing time frame. You will need to manually 'fill the gap' for Reminders not sent while it was inactivated. This can be done from the Reminder Schedule.

Reminder Catch-up

If you were not sending reminders for any period of time via automation or not, these will mostly like now be overdue, but you will still need to send them a reminder.

From the Reminder Schedule, simply enter in a past date range. You may also choose to specify reminders that have not been notified. These are now overdue but were never given a first reminder so you may like to send a slightly different communication to your standard overdue/lapsed template.

Appointment Reminders

Looking at your appointments now, if an automated message is sent for an appointment, a green speech bubble icon will appear to indicate a message was sent. If the client replies, you will then see a blue speech bubble. It's important that these replies are read and actioned if required.

If you have the Automation Service running, this will automatically be checking for these replies.

You can easily read the message that was sent or received by right-mouse clicking the appointment and select 'View SMS History'. From the SMS history window, you can easily follow the conversation and Send an SMS from here

Utilise this 2-way communication linked to the appointment to gain additional information and minimise staff time on the phone and avoid mis-communications as everyone will be able to see the same information.

All these communications are recorded in the Client Communication window for future reference.

Marketing Campaigns

Re-engage and reactivate clients with promotions in area identified via your Client Sales Reports using the Marketing Schedule.

Utilise the Previous Sales to anticipate who will require these products or services. This could be any repeat product or service like food, preventative medications, re-checks and so on.

From the Marketing Schedule, insert a new search.

- On the Client tab, leave the default N in the inactive field
- On the Animal tab, again leave the default status of active and enter N in the **Inactive** field. This will search for Active and Alive animals
- Enable the Invoice Tab by ticking 'search invoice details'
    - Here you can either the **Stock Code** for an individual item or appropriate **Sales Group** / **Analysis Group** for a collection of products. Analysis Groups can be created and items added to facilitate these searches if required.
    - Then enter a data range to search for these sales eg. 1 OCT 19 to 31 DEC 19

        The date of the sale to search for will be in respect to the size and dosage of the product.

        i.e. If the bag of food should last 28 days if the recommended daily amounts are given, then we would be looking for sales approx. 28 days ago.
- Now RUN the search

From the Search Results,

- Select the **Bulk Update** button
- Select **View/Create Groups**
- Insert a new group for this Campaign eg. Q4 2019 Food Sales – no resale
- Select this new group and **Update Groups**

All these animals will then be added to the group

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Now, we are going to run another search

- From the Animal Tab, select the **Animal Group** we just made
- On the invoice tab, remember to tick the box, select the same item or group and now a more recent date range – these will be the ones we will eliminate as they have purchased the product or service more recently.
- Run the search

We are going to Bulk Update again but this time we are **removing** these animals from the group. Everyone who is left has not purchased food since Q4.

So once last time, insert a new search for the animals in the Group and RUN

From the resulting list, you can Merge to mail, email or SMS to send out a communication to encourage your clients to come in and buy again.

By having these animals in a group, you can revisit this in the future to see if any have made a purchase since the communication using the same method.

Stock Health Check

While thinking about your Products and Services, it's a good idea to tidy that list up.

There are a number of recommendation actions to improve your inventory, but the top 5 things are:

- **Inactivate stock items** that not have not bought or sold in the last few years. If it's not in the list, your staff cannot accidently invoice it out if it's the incorrect item
- **Invest in a Point of Scale scanner** if you don't already have one on your reception desk. Scanning items when invoicing improves accuracy and speeds up the time it would otherwise take to search for a product
- **Formulate Procedures** with all the inclusions so staff cannot forget to add things to invoices that would be considered standard.
- **Integrate with your Online Supplier**. If you purchase from Provet, Cenvet, Lyppard or SVS (NZ only) you can download your invoices electronically directly into VisionVPM which will update your cost price and stock on hand based on the Supplier Codes. You can even go the other way and place orders electronically from within VisionVPM.
- **Stocktake regularly**. Compliment your end of financial year stocktake with periodic rolling stocktakes. Monitor your stock on hand levels and items that require adjusting as something might be a-miss here. Without a stocktake, you might never know.

For more information, view our guide to **20 Steps to Better Stock Management**

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Contacting the VisionVPM Service Desk

If you require help throughout the steps described in this document, please contact the VisionVPM Service Desk.

	New Zealand	Australia
Phone	0800 847 876	1800 150 264
Email	support.visionvpm@covetrus.com	

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