

# The Veterinary ✨ CSR Daily Checklist

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*A simple, repeatable routine to help you manage phones, clients, and appointments—without the overwhelm.*

## 1. Start of Day

*SET YOURSELF UP FOR SUCCESS*

- Log into all systems (PIMS, phones, messaging platform, email)
- Review today's appointment schedule for gaps, double bookings, or special cases
- Check for overnight messages, voicemails, and emails
- Flag urgent requests (sick pets, medication refills, cancellations)
- Confirm staffing coverage and note any schedule changes
- Open and review digital forms or paperwork submitted ahead of appointments



## 2. Morning Priorities

*GET AHEAD EARLY*

- Confirm same-day appointments (especially surgeries and drop-offs)
- Send reminders for any unconfirmed appointments
- Respond to overnight client messages and inquiries
- Process refill requests and route approvals to medical staff
- Check for any lapsed clients or last-minute openings to fill
- Communicate any urgent updates to the team



### 3. Throughout the Day

*KEEP THINGS RUNNING SMOOTHLY*

- Answer phones promptly and triage calls efficiently
- Monitor messages and respond in a timely manner
- Greet clients warmly (in person and via text/email)
- Coordinate with technicians and veterinarians on patient status
- Keep appointment flow moving—check clients in and out quickly
- Keep the lobby informed of wait times and delays
- Update patient records with accurate notes and communication history

### 4. Client Experience

*MAKE EVERY INTERACTION COUNT*

- Confirm next steps before clients leave (follow-ups, meds, rechecks)
- Provide estimates and payment details when needed
- Ensure all questions are answered clearly and confidently
- Share educational resources or instructions
- Keep communication friendly, empathetic, and professional



## 5. Midday Check-In

*RESET AND REFOCUS*

- Review the schedule for the rest of the day
- Follow up on pending messages or tasks
- Fill any open appointment slots if possible
- Take a quick breather when possible
- Check in with the team on any delays or bottlenecks



## 6. End of Day

*CLOSE OUT CLEANLY*

- Confirm all messages, voicemails, and emails have been addressed
- Send next-day appointment reminders
- Reconcile payments and ensure invoices are complete
- Note any urgent follow-ups for the next day
- Review tomorrow's schedule and flag any issues
- Log out of systems and tidy up workspace



## Pro Tips for a Smoother Day

- Use templates for common responses to save time
- Prioritize urgent requests first—everything else can follow
- Keep communication centralized to avoid missed messages
- Don't be afraid to ask for help during busy moments
- Small check-ins throughout the day prevent big problems later

Learn more or book a demo at [otto.vet](https://otto.vet)

