

BEYOND SINK OR SWIM:

How to Set New Doctors Up for Success Guide

Announcing a new doctor via email or SMS is a small step that makes a big impact. It helps clients feel informed, builds trust in your clinic's team, and creates a warm welcome for the new veterinarian. When clients know who they'll be seeing—and why they can feel confident in that care—they're more likely to book appointments and stay engaged with your clinic. That's why we've provided a ready-to-use example message: to make it easy for your team to hit "send" without the stress of writing something from scratch, while making sure the message feels professional, friendly, and aligned with your clinic's voice.

SMS AND EMAIL EXAMPLE

We're thrilled to announce that a new veterinarian has joined our team. Please help us welcome
~*INSERT PROVIDER NAME*~!

~*INSERT IMAGE*~

~*INSERT PROVIDER BIO OR BACKGROUND*~

To book an appointment with ~*INSERT PROVIDER NAME*~ beginning ~*INSERT START DATE
HERE*~, click the button below:

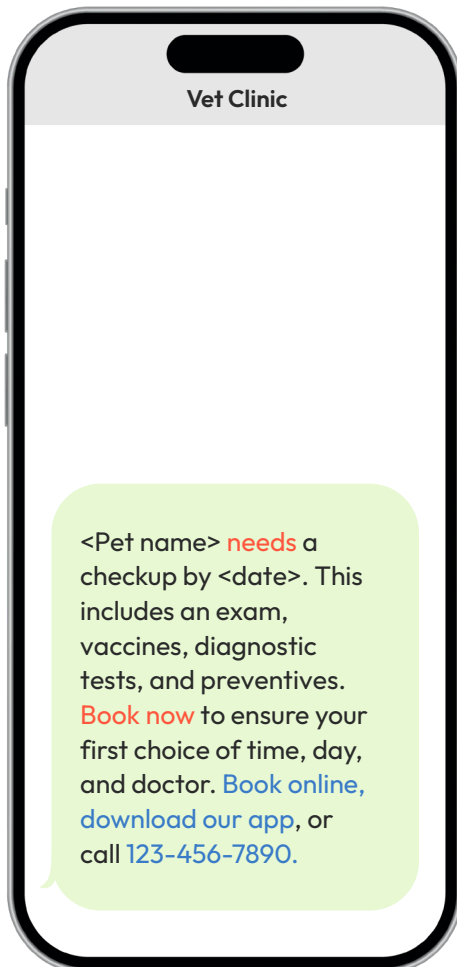
[RequestApptButton]



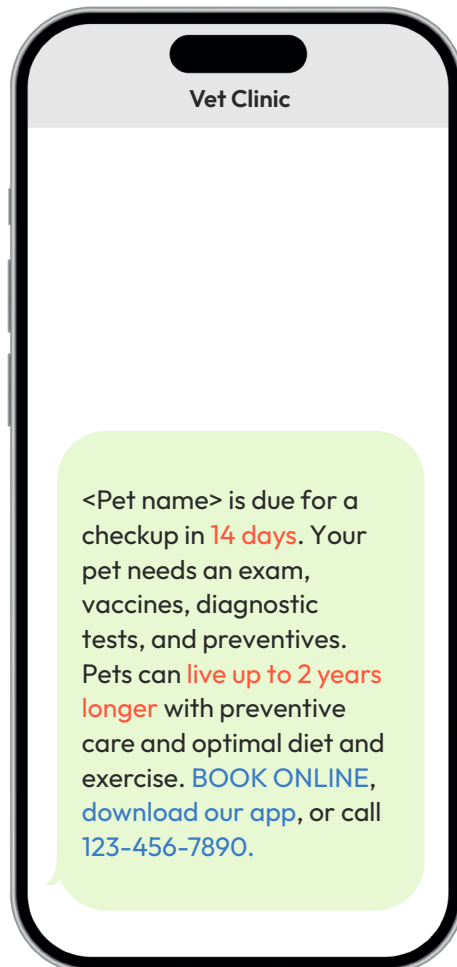
TEXT MESSAGING

Providing example conversations and scripts for a new veterinarian is crucial because it builds confidence, consistency, and clarity from day one. One of the biggest challenges early on isn't just treating patients—it's getting appointments on the books. Offering scripts for things like follow-up calls, treatment plan recommendations, or nudging a client to book that recheck helps new vets speak with purpose and professionalism. It takes the guesswork out of how to approach these moments, empowering them to drive care forward while keeping the clinic's schedule full. Providing example conversations and scripts for a new veterinarian is crucial because it builds confidence, consistency, and clarity from day one. One of the biggest challenges early on isn't just treating patients—it's getting appointments on the books. Offering scripts for things like follow-up calls, treatment plan recommendations, or nudging a client to book that recheck helps new vets speak with purpose and professionalism. It takes the guesswork out of how to approach these moments, empowering them to drive care forward while keeping the clinic's schedule full.

First Touch Scheduling text -



Second Touch Scheduling text -



Overdue Visit Text Message -





Veterinary Email Marketing Cheatsheet

Easy wins for better clinic-to-client communication

1

SEND FEWER, MORE VALUABLE EMAILS

- Avoid overloading inboxes — quality over quantity.
- Aim for **relevance + timing** over frequency.

2

SEGMENT & PERSONALIZE

- Group emails by pet type (dogs, cats), age, visit history, or health conditions.
- Use **pet and owner names** in subject lines and body text.
- Example: “Max’s Check-Up Reminder” vs. generic “Vet Visit Reminder.”

3

NAIL THE SUBJECT LINE

- Use personalization
- Be specific and brief
- Avoid spammy words (FREE!!!, RE:, ALL CAPS)

Examples:

- “Bella’s Winter Wellness Tips ❄️”
- “20% Off Flea Prevention – This Week Only!”

4

BALANCE PROMOTIONS WITH EDUCATION

- Use the 80/20 rule: 80% educational, 20% promotional.
- Pair seasonal advice with soft calls-to-action.
 - E.g., “5 Summer Safety Tips + Book Your Summer Checkup”

5

TIMING MATTERS

- Test different send times: 7–9 AM, 10 AM–12 PM, or 5–7 PM.
- Avoid sending the same time every week—mix it up.

6

USE CLEAR, SIMPLE DESIGN

- Bullet points > paragraphs.
- Include a clear **CTA** (e.g., “Book Now,” “Learn More”).
- Make sure it’s **mobile-friendly** (large buttons, 1-column layout).

7

KEEP YOUR LIST CLEAN

- Remove hard bounces and unsubscribes automatically.
- Regularly update contact info and correct spelling/capitalization.

8

TEST & LEARN

- Run A/B tests on subject lines, send times, CTAs.
- Monitor open, click-through, and unsubscribe rates.

9

PROOFREAD LIKE A PRO

- Read aloud, use tools (Grammarly), or print for review.
- Ask at least one other team member to review before sending.

BOOK A DEMO TODAY!

Let Otto help automate and streamline
your clinic’s client communication.



New DVM 30/60/90 Day *CHECK-IN FORM*



This check-in is for YOU. Our goal is to support your success, fulfillment, and growth in this role. Your honest feedback helps us create a better onboarding experience and a stronger team.

Name: _____ Date: _____

Check-In Type: ☐ 30 Day ☐ 60 Day ☐ 90 Day

Manager/Leader Conducting Check-In: _____

Wellness & Connection

How would you describe your overall wellbeing and mental health right now?

Do you feel welcomed and supported by your team?

Have you had moments where you've felt "at home" here? What made that possible?

Is there anything we could do to help you feel more connected or cared for?

Reflecting on Onboarding

How would you rate the onboarding process so far?

☐ Excellent ☐ Good ☐ Okay ☐ Needs Improvement ☐ Poor

Tell us more about what worked (or didn't): _____

Are the job responsibilities aligned with what you expected before starting?

Is anything about your role or our processes still unclear or confusing?

Do you have access to the tools, resources, and information you need to do your job well?

What's been your favorite part of onboarding? Least favorite?



Role Fit & Fulfillment

How would you rate the last 30/60/90 days of your experience here?

☐ Thriving ☐ Doing Well ☐ Figuring It Out ☐ Struggling

Do you feel this role aligns with your career goals and values?

What does the best day at work look like for you?

What part of your current role do you enjoy the least—and why?

Have you encountered any challenges or frustrations you'd like to talk through?

Goals & Growth

Have you met the goals we set for the past 30 days?

☐ Yes ☐ Mostly ☐ Not Yet ☐ We didn't set any (yet!)

If not, what got in the way—or what changed?

What goals would you like to set or focus on for the next 30 days?

Is there anything you'd like to learn more about in this role?

How can we support your professional development right now?

Feedback & Ideas

Do you feel safe and supported in giving feedback to your team or manager?

What's one thing we could do differently to make your experience better?

Do you have any feedback for your manager or the hospital team?

Anything else you want to share that we haven't covered?

Reminder: This is a partnership. We believe in your potential and your unique contributions. These check-ins aren't performance reviews—they're conversations to make sure we're building something with you, not just around you.

Optional Manager Notes:

Observed Wins:

Follow-Ups & Support Needed:

Next Steps / Goals for [Next 30 Days]:

TOP 5 WAYS

AI Is Saving Vet Clinics Hours Every Week



The future of veterinary care isn't coming—it's already here. Artificial Intelligence (AI) is transforming how vet clinics operate day to day, and the real value isn't just in high-tech buzz—it's in time saved.

For practice managers juggling staff burnout, appointment backlogs, and efficiency headaches, AI is no longer optional. It's a competitive advantage. The good news? You don't need to overhaul your clinic overnight to benefit. Incorporating a few places your team can start using AI can save them hours each week while improving patient care.

Here are five practical, time-saving ways AI is already making a difference in vet clinics—plus one bonus you might not have thought about.

ONE

Automated SOAP Writebacks and Medical Record Updates

The Problem: Manual medical record entry takes up valuable doctor and tech time—especially at the end of already long shifts.



The AI Fix: AI-powered tools now sync SOAP notes and patient history back to your PIMS automatically, typically overnight.



Why It Matters: Your team starts the day with clean, up-to-date records, and nobody stays late trying to catch up on documentation.



Action Tip: Look for AI solutions that integrate directly with your PIMS for hands-free, error-reducing writebacks.

TWO

Smart Scheduling Assistants

The Problem: Missed appointments, scheduling inefficiencies, and poor provider-case matching waste time—and revenue.



The AI Fix: Smart scheduling tools use machine learning to suggest optimal time slots, forecast appointment lengths, and send automated reminders.



Why It Matters: More appointments get filled, fewer get missed, and your team isn't overloaded in the process.



Action Tip: Choose an AI scheduler that accounts for provider preference, appointment type, and case complexity.

THREE

Client Communication and Follow-Up Automation

The Problem: Staff spend hours chasing down appointment confirmations, sending lab results, and responding to repetitive client questions—pulling them away from patient care.



The AI Fix: AI-powered communication platforms take it further than simple automation. These systems don't just send messages—they understand intent. With natural language processing (NLP), AI chatbots can respond to common questions (like "When is my appointment?" or "Is my pet due for vaccines?") and route more complex inquiries to the right team member. Post-visit care reminders and follow-ups are triggered by appointment types or outcomes, not just a static calendar.



Why It Matters: AI reduces the manual back-and-forth and offloads routine communication, giving staff more time to focus on urgent calls, client education, or in-clinic support. It also improves client satisfaction by offering faster, more consistent responses—day or night.



Action Tip: This technology is still new. You want to look for a communication platform that is building AI capabilities and knows that AI capabilities like intent recognition and smart routing—not just bulk texting—are coming and have a plan around this (even if it's high level).

FOUR

Inventory Management Optimization

The Problem: Stockouts and over-ordering lead to stress, lost revenue, and wasted staff time on manual counts.



The AI Fix: AI systems track inventory usage patterns, forecast demand, and can even reorder automatically.



Why It Matters: Less micromanaging inventory means more time for care—and fewer emergencies caused by missing meds or supplies.



Action Tip: Use platforms that integrate with your vendors for end-to-end inventory automation.

FIVE

Triage and Workflow Prioritization Tools

The Problem: During peak hours, teams lose time manually sorting urgent cases from routine ones—slowing care and overwhelming staff.



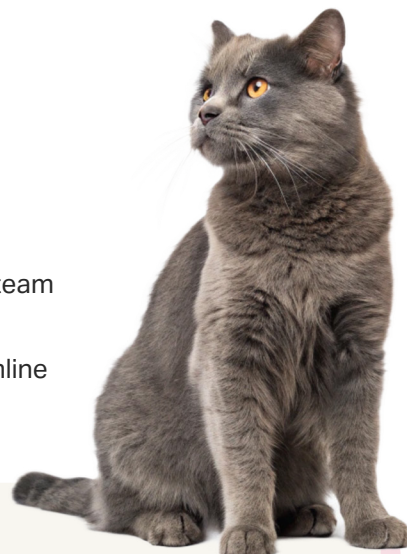
The AI Fix: AI triage tools instantly analyze client-reported symptoms and prioritize care based on urgency.



Why It Matters: Urgent cases are fast-tracked. Wait times go down. Your team works smarter, not harder.



Action Tip: Implement triage AI at the front desk or online intake to streamline care routing from the start.



BONUS

AI for Diagnostic Analysis

The Problem: Interpreting diagnostic data—bloodwork, radiographs, urinalysis—takes time and can vary between clinicians.



The AI Fix: AI-assisted diagnostic tools analyze data in seconds, flagging abnormalities, trends, and patterns that might be missed.



Why It Matters: Clinicians make faster, more confident decisions, improving both patient outcomes and case throughput.



Action Tip: Consider AI tools that integrate with your lab equipment or diagnostic imaging to catch issues earlier and reduce interpretation time.

AI isn't here to replace your team—it's here to give them time back. Even implementing just one of these tools can reclaim hours each week, reduce stress, and improve care delivery.

Remember:



Time saved = less burnout



Greater efficiency = higher profitability



Better workflows = better patient outcomes

Start small. Choose one area—like SOAP syncing or follow-up automation—and build your AI toolkit from there. The future of veterinary efficiency starts now.



Book a free demo of the Otto AI Suite and discover how your clinic can start saving hours every week—without adding extra work to your team.

LOVE LANGUAGES OF APPRECIATION

Understanding a new hire's language of appreciation can make all the difference in helping them feel seen, supported, and truly part of the team. Everyone feels valued in different ways—some through words, others through actions or time—and learning how your new veterinarian prefers to receive appreciation can strengthen collaboration, morale, and retention. It's a simple step that creates a more connected and motivated team culture from the start.

Here's a quick overview of the five languages of appreciation:

Words of Affirmation: Verbal encouragement, praise, or kind notes.

Quality Time: Undivided attention, check-ins, or shared breaks.

Acts of Service: Lending a hand when they're busy or overwhelmed.

Tangible Gifts: Small, thoughtful tokens that show you're thinking of them.

Physical Touch: A handshake, high-five, or shoulder pat (used appropriately, of course).



Curious what yours is—or want to share it with your team?
Take the quiz and start building stronger, more personalized
connections at your clinic.

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