



LET AI SUPPORT THE WORKFLOW
**So You Can Focus on
Personalized Care**



A step-by-step guide to taking the first steps with AI to ease the burden of administrative tasks and level up client communication, leaving the clinical decision-making to your human team.



WHERE TO START with AI in Veterinary Practice

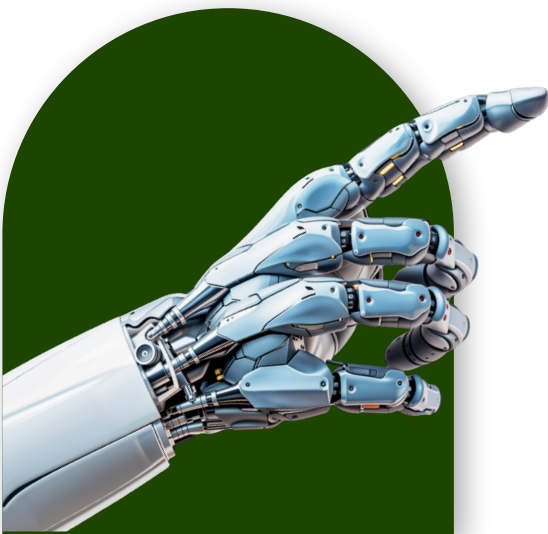


Artificial Intelligence. It seems like we can barely get through a conversation about work productivity without AI emerging as a solution. In some industries, AI is a no-brainer. Because the risk profile of a mistake is low. For veterinarians, AI applications are being cautiously considered to ensure quality of care isn't compromised.¹



Most veterinary teams are taking a conservative approach to AI adoption to keep clinical decision-making with the veterinary care team. Where AI is creating major efficiencies for veterinary teams is in non-clinical workflows. That's where the redundant tasks are crushing teams, and where AI capabilities shine.

This guide includes tips for how to use AI to provide your team with relief from the repetitive work that keeps phones ringing, messages piling up, records unfinished, and team members in the practice long after the final appointment.



THE GOAL

is to remove manual non-clinical touches to give your team more time for patients, clients, and each other.



¹ <https://pubmed.ncbi.nlm.nih.gov/39933254/>

INSIDE THE GUIDE



It explores opportunities such as:



Drafting routine communications



Supporting medical documentation



Managing scheduling and reminders



Organizing administrative information



Creating standard operating procedures (SOPs) and training materials



Improving phone and message workflows



Identifying trends in practice data



This is **not** a guide to using general-purpose AI to:

✗ Diagnose patients

✗ Select treatments

✗ Calculate medication doses

✗ Interpret diagnostic images

✗ Determine whether a patient is experiencing an emergency

✗ Replace the judgment of a veterinary professional

Why Start With *WORKFLOWS?*



AI can feel overwhelming when it is presented as a complete transformation of veterinary practice. Do not let this get in the way of you getting started with AI. Changes can be made one small step at a time to minimize disruption and deliver quick wins.

A more practical approach is to begin with using AI to streamline repetitive tasks that:

- Consume a meaningful amount of time
- Follow a fairly predictable process
- Produce an output that can be reviewed
- Do not require AI to make a clinical decision
- Can be tested without rebuilding the entire workflow

Many veterinary practices are beginning with the following workflows:

- Documenting a visit (AI scribes are the most well-adopted AI tool in animal health)²
- Answering a routine question via text
- Scheduling, rescheduling, confirming, or following up on an appointment
- Summarizing a message thread
- Following up on a visit



These well-defined workflows allow AI to unlock major efficiencies for your team and, in many cases, accelerate the speed of client touchpoints, improving customer satisfaction.

STEP 1

Find the Friction



Before deciding which AI tools are the best to start with, audit your team's day. This exercise will reveal where the most friction lies and where the quickest AI-assisted wins are.

Where does work tend to pile up?

Check the tasks that regularly consume time or create bottlenecks:

Documentation

- ☐ Medical notes remain unfinished at the end of the day or are incomplete
- ☐ Clinicians spend significant time typing during or after appointments
- ☐ Referral letters and callback summaries take too long to prepare
- ☐ Documentation format and quality vary significantly between team members

Client communication

- ☐ The team repeatedly answers the same questions
- ☐ Client messages accumulate faster than the team can respond
- ☐ Long message threads require time to review and summarize
- ☐ Follow-up instructions are difficult to personalize efficiently
- ☐ Complex information is difficult to explain in client-friendly language
- ☐ Reminders do not consistently reach clients



Phones and scheduling

- ☐ Missed calls result in lost appointments or delayed responses
- ☐ Clients spend too long on hold
- ☐ Voicemails accumulate during busy periods
- ☐ After-hours scheduling requests wait until the next business day
- ☐ Staff spend significant time confirming or rescheduling appointments
- ☐ Routine phone requests interrupt higher-priority work

Team administration

- ☐ SOPs are outdated, incomplete, or inconsistent
- ☐ Onboarding materials must be recreated for each new employee
- ☐ Training resources exist only in the minds of experienced team members
- ☐ Writing job postings and interview questions takes too much time
- ☐ Internal policies are difficult to organize and update

Practice operations

- ☐ Inventory management relies on manual reminders or workarounds
- ☐ Managers spend too much time assembling routine reports
- ☐ Practice data is available but difficult to interpret
- ☐ Payment and checkout processes create unnecessary steps
- ☐ Follow-up opportunities are missed because information is fragmented





Which problem affects your practice the most?

The workflow creating the most friction is:

The people most affected by it are:

The consequence of the current process is:

- ☐ Lost time
- ☐ Delayed client responses
- ☐ Inconsistent communication
- ☐ Unfinished documentation
- ☐ Missed appointments
- ☐ Team frustration
- ☐ Reduced capacity
- ☐ Other:



STEP 2

Identify a Practical Starting Point

Not every frustrating workflow is a good first AI project. Start with a task that is repetitive, clearly defined, and easy to monitor changes before and after AI implementation. This first project should be a “quick win” because it’s easy to implement and delivers high-impact results.



Use the checklist below to identify AI projects that your team could benefit from.

Internal Team Tasks

AI can help create a starting draft for:

- | | |
|--|---|
| ☐ SOPs | ☐ Employee communications |
| ☐ Onboarding checklists | ☐ Meeting summaries |
| ☐ Training outlines | ☐ Internal policy drafts |
| ☐ Job postings | ☐ Marketing and social media content |
| ☐ Interview questions | |

These can be approachable first projects because the output stays inside the practice and can be reviewed before use.

Example

Instead of asking AI to “create an employee handbook,” start with a narrower request:

“Draft a checklist for onboarding a new veterinary CSR during their first five days. Organize it by day and include space for the trainer’s initials.”

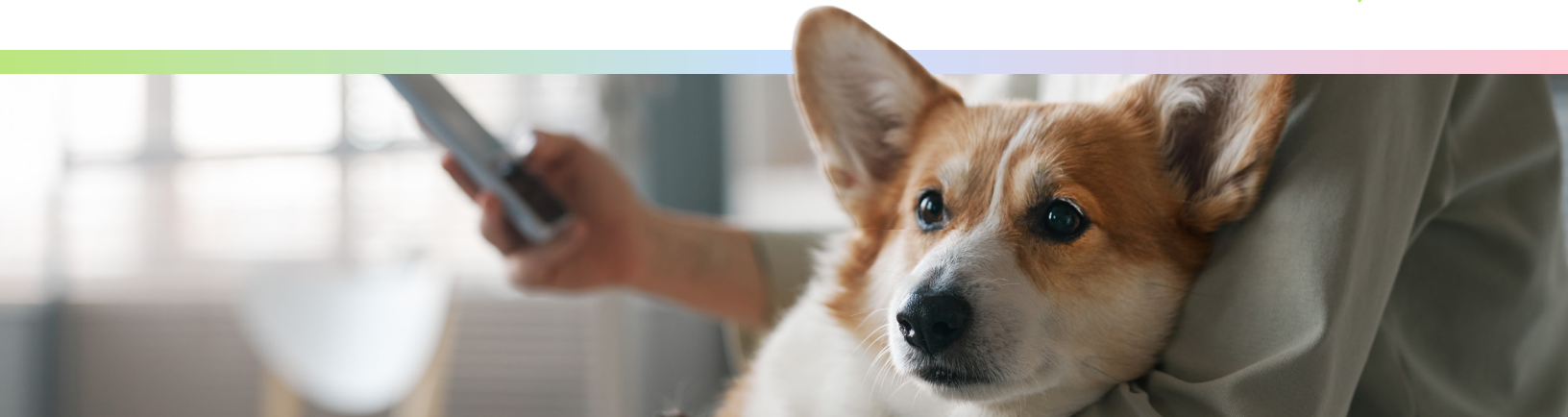
A specific task produces a more useful result and makes errors easier to identify. You can also upload other SOPs or documents to help the AI learn your tone and style before drafting your document.

Client Communication

AI can help your team draft or organize:

- ☐ Routine follow-up emails or texts
- ☐ Appointment reminders
- ☐ Responses to frequently asked questions for online chat, text, or email communications
- ☐ Summaries of long client message threads
- ☐ Client education based on clinician-approved information
- ☐ Plain-language explanations of existing instructions
- ☐ Post-appointment communication
- ☐ Refill and recheck messages

AI should help your team communicate more efficiently, not communicate independently. These communications are created either by a human or with AI assistance, and then thoroughly reviewed by a team member before they go out in the wild. Where AI provides major efficiency improvements is in its ability to automate the deployment of these previously approved messages.



Before anything reaches a client, a qualified team member should confirm that:

- ☐ The information is accurate
- ☐ The message applies to the individual patient. If using personalization tokens (Like Mrs. **Last Name**), make sure the data is clean.
- ☐ The tone is appropriate and compassionate
- ☐ No important context has been omitted
- ☐ The client's question has actually been answered
- ☐ The appropriate veterinary professional has approved clinical information



A CLEAR DIVISION OF RESPONSIBILITY



AI May

Draft, summarize, simplify, organize, deploy, or adjust the tone.



Your Team Must

Verify, personalize, approve, and deploy.

Online Scheduling and Phone Workflows

AI-assisted systems may help with:

- ☐ Booking routine appointments
- ☐ Confirming or rescheduling appointments
- ☐ Sending reminders
- ☐ Identifying the reason for a call
- ☐ Routing requests to the correct team member
- ☐ Managing overflow during busy periods
- ☐ Supporting routine after-hours scheduling
- ☐ Recording or summarizing conversations for review

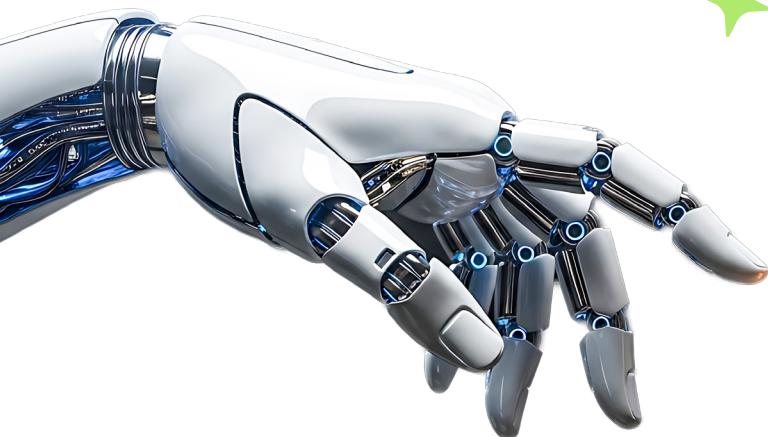
Before using AI in a phone workflow, confirm that:

- ☐ Clients can reach a person when necessary
- ☐ Potential emergencies are immediately escalated
- ☐ AI does not provide medical advice
- ☐ Complex or emotional conversations reach the team
- ☐ Staff can review the interaction
- ☐ The system follows practice-approved scheduling rules
- ☐ Clients understand when they are interacting with an automated system

These tools should make it easier to reach the practice, not create a wall of frustration between clients and the team.

MEDICAL DOCUMENTATION SUPPORT

An AI scribe can listen during an appointment and produce a structured first draft of the medical record for the clinician to review. This can reduce typing and allow clinicians to spend more of the appointment engaging with the client.



Animal health-specific scribes are especially useful because they are trained to cut out the fluff of general conversation to narrow in on the most important clinical information that needs to be documented.

AI documentation support is not the same as AI practicing medicine.



The clinician must still:

- ☐ Review the entire record
- ☐ Correct inaccurate or missing information
- ☐ Confirm that the note reflects the examination and conversation
- ☐ Add relevant professional judgment
- ☐ Approve and sign the final record
- ☐ Follow practice policies for recording and client disclosure

**AI can draft the medical record.
It cannot own the medical record.**



Practice Operations and Business Insights

AI tools may help practice managers:

- ☐ Organize routine reports
- ☐ Explore appointment trends
- ☐ Identify administrative bottlenecks
- ☐ Monitor inventory patterns
- ☐ Find clients or patients requiring routine follow-up
- ☐ Identify lapsed clients for re-engagement campaigns
- ☐ Review reminder performance
- ☐ Surface gaps in existing workflows
- ☐ Summarize operational data

An AI-generated insight is a prompt for further investigation, not an automatic business decision.

Before acting, ask:

- ☐ Is the underlying practice data complete?
- ☐ Is it accurate?
- ☐ Does the recommendation match what the team is experiencing?
- ☐ Could missing context change the conclusion?
- ☐ Has a manager reviewed the recommendation?

AI cannot understand your business better than the information it receives.

STEP 3

Give the Workflow the AI Starting-Point Test

Identify the first task you want to use AI for and use the checklist below to evaluate if the workflow you want to improve is a good “quick win” project.



Write the workflow you are considering improving with AI:

The task

Place a check next to each criteria that the task meets.

- ☐ The task is repetitive
- ☐ The process is reasonably consistent
- ☐ The desired output can be clearly described
- ☐ The task consumes enough time to make improvement worthwhile

The boundaries

Place a check next to each criteria that the task meets.

- ☐ AI will support the task rather than make a clinical decision
- ☐ A person can review the output before it is used
- ☐ Mistakes can be found and corrected before reaching a client
- ☐ The team can clearly define what AI may and may not do



The information

Place a check next to each criteria that the task meets.

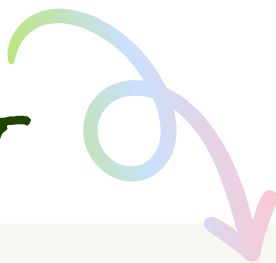
- ☐ The tool is appropriate for the information involved
- ☐ Sensitive information will not be entered into an unapproved public tool
- ☐ The vendor can explain how data is collected, stored, and used
- ☐ Recording or transcription will be appropriately disclosed

The outcome

Place a check next to each criteria that the task meets.

- ☐ The practice can measure the time required before and after implementation
- ☐ The team can track corrections and errors
- ☐ The workflow can be tested on a limited scale
- ☐ The practice can stop or adjust the process if it does not work

YOUR
RESULT



10–16 checks

This may be a strong candidate for a first pilot.



6–9 checks

The workflow may need clearer boundaries or a better-defined process.

0–5 checks

Choose a simpler, lower-consequence task for your first project.

STEP 4

Establish Practice Guardrails



AI works best when the team knows what is expected. Without a shared policy, different employees may use different tools, enter inappropriate information, or assume that a confident-sounding answer is correct.

Approved use

- ☐ The practice maintains a list of approved AI tools
- ☐ Employees know which tasks AI may support
- ☐ Employees know which tasks are off-limits
- ☐ Each AI-assisted workflow has a designated owner
- ☐ The team receives basic training before using the tool

Human review

- ☐ AI-generated content is treated as a draft
- ☐ Client-facing communication is reviewed before sending
- ☐ The responsible clinician reviews medical documentation
- ☐ Uncertain or complex situations are escalated
- ☐ Final responsibility remains with the veterinary team

Accuracy

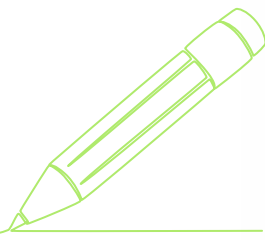
- ☐ Employees understand that AI can produce plausible but incorrect information
- ☐ Clinical claims, instructions, citations, and other important facts are verified
- ☐ Team members do not approve an output simply because it sounds confident
- ☐ Errors are documented and discussed
- ☐ Repeated mistakes trigger a review of the workflow

Privacy and transparency

- ☐ Identifying client and patient information stays out of unapproved public tools
- ☐ Sensitive business and financial information is protected
- ☐ The vendor clearly explains how practice data is handled
- ☐ Recording and transcription are disclosed appropriately
- ☐ Clients are informed when transparency is required or appropriate

STEP 5

Write a Better Prompt



For general-purpose AI tools, the quality of the first draft often depends on the clarity of the instructions.

A useful prompt should include:

The target audience.

If the material is pet owner facing the tone will be different than internal documentation for the care team.

Contextual information to help the tool do it's task.

Provide as much detail as you can including non-proprietary document uploads to help the tool do it's job.

Detailed task description.

Give the tool as much detail as possible about the requested task, for example:

Create a five-day onboarding checklist covering phone etiquette, appointment scheduling, message routing, payment procedures, and emergency escalation.

The desired format of the answer.

Request an image, checklist etc.

Set boundaries.

Tell the tool what to avoid, such as medical recommendations.

Remember: revise instead of restarting.

If the first result is not quite right, tell the tool what to change:

- Make the language more concise.
- Reorganize this into a checklist.
- Remove clinical recommendations.
- Use a warmer tone.
- Rewrite this for a sixth-grade reading level.
- Add placeholders for practice-specific information.
- Identify anything that still requires verification.

The first response does not need to be the final response.

STEP 6

Measure Whether It Actually Helped

A new tool is not valuable simply because it worked. It should make the workflow meaningfully better.

Establish a baseline before the pilot whenever possible.



Track the following:

Measure	Before AI	During Pilot
Average time required		
Tasks completed per week		
Corrections required		
Errors or concerns		
Unfinished tasks		
Team satisfaction		

Also ask:

- | | |
|--|--|
| ☐ Did the tool save meaningful time? | ☐ How much editing did each output require? |
| ☐ Did it reduce repetitive work? | ☐ Did clients notice any change—positive or negative? |
| ☐ Did the team find it easy to use? | ☐ Was the time saved reinvested into higher-value work? |
| ☐ Did it improve consistency? | |
| ☐ Did it create new steps or frustration? | |

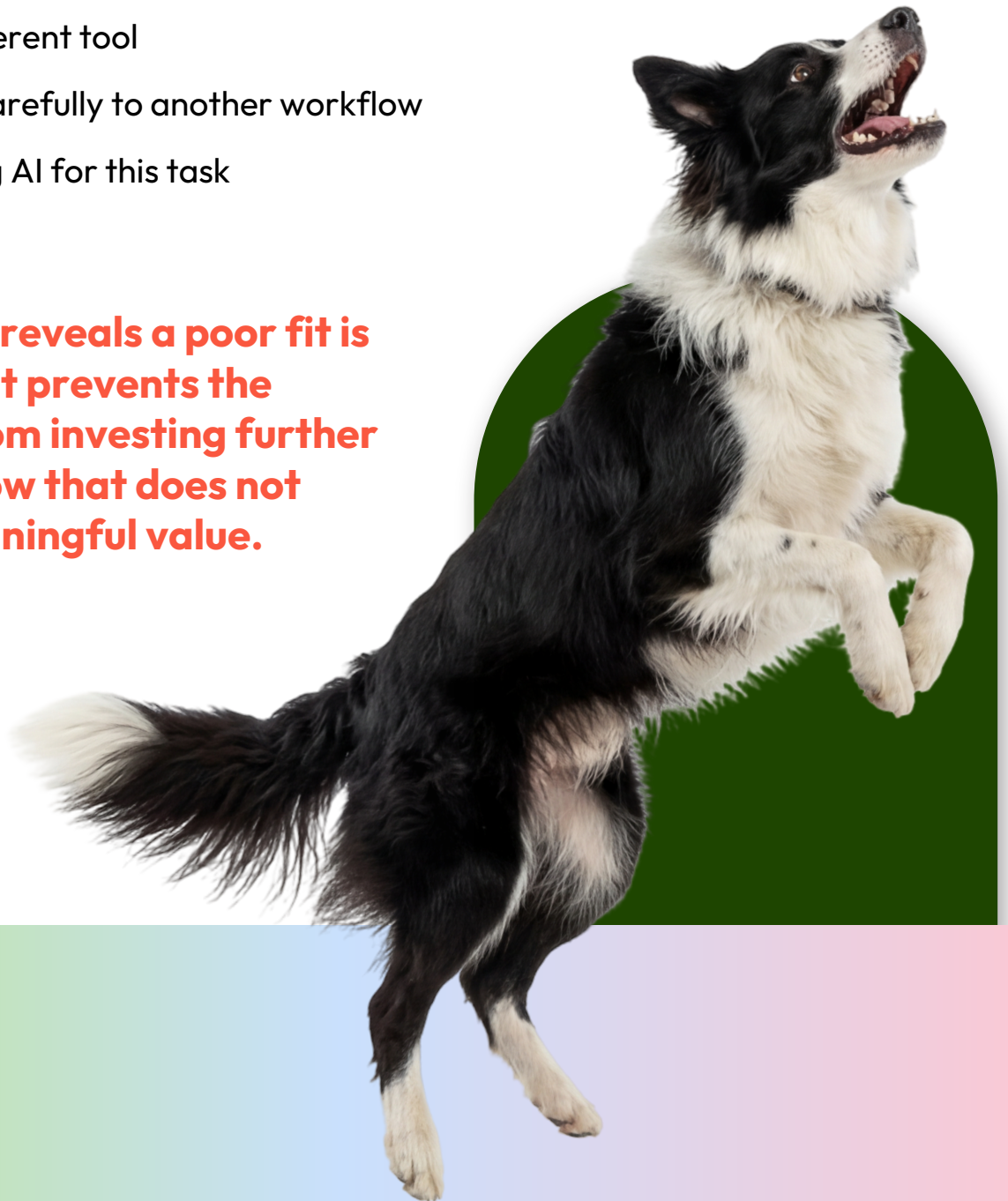


DECIDE

what happens next

- ☐ Continue using the workflow
- ☐ Adjust the process and test again
- ☐ Provide additional training
- ☐ Try a different tool
- ☐ Expand carefully to another workflow
- ☐ Stop using AI for this task

A pilot that reveals a poor fit is still useful. It prevents the practice from investing further in a workflow that does not deliver meaningful value.



QUESTIONS TO ASK AN AI VENDOR



An impressive demonstration does not tell you how a tool will perform inside your practice.

Before adopting a platform, ask:

1. What specific problem does the tool solve?

Make sure the problem exists in your practice and is important enough to address.

2. How does it fit into our current workflow?

Ask whether the tool integrates with the systems your team already uses or creates additional steps.

3. What happens when the system is uncertain?

The tool should have a clear process for escalating exceptions to a person.

4. What information was used to train or develop it?

Ask whether the information is relevant to veterinary practices like yours.

5. Can our team review and correct its work?

Look for visibility into what the system produced, recommended, or changed.

6. How is our data handled?

Ask what is collected, where it is stored, who can access it, and whether it is used to train other systems.

7. What control does our team retain?

Confirm that staff can approve actions, change rules, access records, and stop the system when necessary.

8. How will we measure success?

Ask the vendor what outcomes the tool is designed to improve—and how your practice can verify them.

Your First-Workflow *ACTION PLAN*



Complete this page with your team.

The friction

The repetitive task we want to improve is:

It currently takes approximately:

It affects:

- ☐ Veterinarians
- ☐ Technicians and assistants
- ☐ CSRs
- ☐ Practice managers
- ☐ Clients
- ☐ Other: _____

The goal

We want this workflow to:

- ☐ Require less staff time
- ☐ Produce more consistent results
- ☐ Reduce unfinished work
- ☐ Improve response time
- ☐ Make communication easier
- ☐ Improve the client experience
- ☐ Other: _____



THE DIVISION of responsibility



AI will:

Our team will:

A person will step in when:

THE MEASUREMENT

We will determine whether the pilot worked by tracking:

We will review the results on:



YOUR AI WORKFLOW STARTER KIT:

Tools for Consideration

Use these tips below to get started revamping your quick win workflow



Finish Notes Faster

Try: Otto AI Scribe

Captures appointments and creates draft SOAP notes for the veterinarian to review and approve.



Keep Clients Informed

Try: Otto Flow

Supports online booking, reminders, forms, payments, follow-ups and two-way client communication.



Turn Conversations Into Action

Try: Otto AI Memo + Task Manager

Summarizes phone calls and helps teams assign and track callbacks, refill requests and other follow-up tasks.



Create First Drafts Faster

Try: ChatGPT or Claude

Draft SOPs, training materials, job descriptions, FAQs and routine communication templates.



Explore Otto's Workflow AI Tools

AI should reduce the work around patient care, giving your team more time for the personalized, hands-on care only people can provide. Otto's tools integrate bi-directionally with your PIMS to simplify documentation and is an all-in-one platform that mitigates the need for piece-meal solutions.

Learn more at otto.vet