

# Management Tools for Veterinary Practices

*Use the right tools for the job...  
and start practicing smarter, not harder.*

## Client Communications

Effective client communication is essential to your practice's success and to the well-being of the patients you serve. An educated and informed client is more likely to comply with recommendations and to value the services their pet receives. This section of **18** forms includes lifetime of wellness for dogs and cats, TLC boarding, kennel camper cards, geriatric and dental targeted marketing letters, dental grading report, internet pharmacy client response letter, purging letter, laboratory test results worksheet and care to share cards. Revised April '05.

## Hospital Forms

Packed with **40** forms commonly used to enhance everyday practice management activities. Includes in-hospital tracking form, patient visit form, pre-anesthetic surgical release form, surgical consent form, canine and feline pre-exam checklists, exam room report card forms (small animal, avian, equine and exotics), "biography" forms (puppy, kitten and exotics), standardized discharge order form, payment agreement form, sample collection letters, controlled drug log form, cash drawer worksheet and client questionnaire. Updated April '05.

## Medical Care Plans

Does your practice write up the same medical care plans over and over again? Standardized Medical Care Plans save not only your valuable time and effort—they also ensure standards of care; help clients better understand their pet's diagnosis; explain the treatment and itemize the costs of the services rendered. This section contains **65** itemized estimates covering the areas of dermatology, ears, x-rays and work-ups, eyes, genital/urinary procedures, gastrointestinal, orthopedics, respiratory/heart and dental as well as other elective and non-elective services. Medical Care Plans include a description of the condition and its treatment. **All fees can be automatically updated by using the master fees feature.** Updated April '05.

## Human Resources

Personnel management can be a challenge. Let us help you make it more manageable with this set of **25** forms designed specifically for human resource purposes. This section includes pointers and samples for writing advertisements for open positions; help for interviewing and checking references; sample letters of job offer; attendance records; and career development plans. You'll find an employee warning notice, corrective action form and discrimination complaint form. There's even a termination checklist and employee exit survey. Added April '05.

## Employee Policy & Procedures Manual

An employee policy manual is an essential management tool that outlines all policies and procedures that relate to employees. An effective manual facilitates communication on important issues and demonstrates compliance with state and federal policies.

Sections within this manual template cover employment status, discrimination, non-solicitation, personal conduct, paydays, timecards, overtime, work schedules, attendance, benefits, uniforms/grooming, employee reviews, incentive program, leave of absence and disciplinary protocol. Revised May '07.

## Job Descriptions Package

By creating job descriptions for all positions within your practice, prospective employees know up front what a job entails. A good job description clearly outlines an employee's duties and responsibilities, providing a framework that supports accountability while equipping the employee for success.

This section contains **36** sample job descriptions for health care team members, including: front desk, kennel, technical, associate, management and other positions. These job descriptions include wording critical for legal compliance. Revised and expanded September '07.

## Phase Training Programs

Phase training programs take a comprehensive view of all the duties and responsibilities of a given job and divide them into training periods referred to as phases. These programs provide an "itinerary" for new employees, allowing them to be trained gradually so that they are not overwhelmed as they initially enter the practice. One of the factors in staff turnover is a lack of structured training. Don't "throw them to the wolves". Providing this structure in the training process allows employees to be trained to a higher level of skill and expertise. This package contains **17** sample phase training programs for front desk, technical, associate, management and other positions. Revised and expanded September '07.

## Employee Evaluation Forms

Employee evaluations are essential in developing a well-informed and motivated team. Don't leave team members wondering if they're meeting expectations or how they can improve their value to the practice. This package contains **39** sample evaluation forms developed specifically for veterinary practices. Included are front desk, kennel, technical, management, associate and other position evaluation forms. Revised and expanded September '07.

## Employee Incentive Program

This section helps you incorporate an effective employee incentive program that motivates employees and creates a team effort within your practice. Bonuses are based on individual performance and your practice's increase in gross income—so those who contribute more receive a greater reward for their extra effort! General implementation information, calculation forms, and three job-specific evaluation forms are included. A calculation program for use with Microsoft Excel make it easy to determine the amount of each employee's bonus and provides documentation that you can present to the employee to show them how it was calculated.

## Protocols

Consistency and structure are imperative to your hospital's daily managerial and personnel operations. A health care team that is provided with guidelines, boundaries and direction is more likely to comply with management's expectations, especially when those expectations are clearly and concisely articulated. This section of **22** forms includes suggested protocols and templates for establishing your expectations in writing. Set your health care team up for success! Added September '07.

## Designing a Hospital Presentation Folder

A well-designed hospital presentation folder educates potential clients about the quality of your practice services—before they even step foot through your door. They are an excellent means of presenting your practice to prospective clients and converting telephone shoppers into bonded clients. We provide the basic information you need to develop your own hospital presentation folder, samples of hospital presentation folders and templates that you can customize to create your own folder. Updated April '05.

# Management Tools



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## for Veterinary Practices

### COMPLETE MANAGEMENT TOOLS

**One comprehensive binder plus all files on CD.**

CD Contains the following formats: MS Word 97-2003 Document (\*.doc), MS Excel 97-2003 Document (\*.doc), & Adobe PDF 7.0 (\*.pdf)

\* See reverse side for detailed descriptions of each section

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