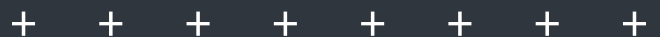


Talking the talk: Client communication strategies for Cornerstone practices

IDEXX
Veterinary Software

A guide to driving compliance, reducing no-shows, and enhancing engagement.



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Modern clients = modern needs

Modern veterinary practices are tasked with more than delivering standout patient care—they must also keep pace with today's tech-driven and pet-centric clientele. Millennial pet owners are bringing not only their pets to the clinic, but increasingly higher expectations for communication cadence, channels, and overall experience.

For time- and staff-strapped practices still relying on manual communication methods, this new level of achievement can feel elusive, exhausting, and altogether out of reach.



How has client communication changed?

Millennials compose **33%** of the **86.9 million** US pet owners, making them the largest current group of pet owners.¹



This generation communicates differently than past generations, and more efficient communication methods, such as two-way messaging and push alerts, may capture their attention more successfully than phone calls and emails. However, this is not only a generational shift—research shows that **80% of people prefer to communicate digitally when interacting with their healthcare providers.**²

¹ APPA's State of the Industry: Strategic Insights from the National Pet Owners Survey 2024. American Pet Products Association; 2024.

² 80% of patients prefer to use digital communication to interact with healthcare providers and brands. News release. Redpoint Global; December 7, 2021.

Accessed April 12, 2024. www.businesswire.com/news

Successful patient care hinges on efficient and effective client communication. Clear, timely, and personalized messaging not only improves outcomes and drives compliance, but creates a tailored and thoughtful client experience that builds long-term loyalty. Instead of seeing these evolving expectations as a hindrance, veterinary professionals can view them as an opportunity to simultaneously elevate patient care and client relationships while driving practice growth and development.



Meeting today's ever-evolving expectations for client communication can be challenging, but such challenges can provide enormous opportunities for growth.

This guide will provide helpful tips to improve communications, streamline your processes, and keep your clients happy.



Does your practice experience any of these communication challenges?

As you read through the following list, mark the challenges your practice could use help with.

- Your phone is ringing off the hook:** From overdue service reminders, to appointment scheduling, to confirmation calls, phone-based booking can add unnecessary phone traffic to every appointment. Keeping up with these calls on top of an already busy call volume could prove challenging for your team.
- Your clients can't reach you:** Clients don't want to call multiple times or wait on hold to ask a question or make an appointment. When clients don't know how to best reach you, frustration builds and may impact future interactions.
- Your clients arrive unprepared for appointments:** New and returning clients are not always aware—or may not remember—your client's protocols. This can result in reduced compliance with pre-appointment instructions such as remembering to bring fecal or urine samples, completing activities like bringing in a fecal sample, or completing pre-appointment paperwork.
- Your waiting area is crowded:** The flow of traffic in your waiting area is inconsistent, with clients showing up early, late, or not at all.
- Clients are reluctant to consent to in-appointment add-ons (e.g., wellness screenings):** Client conversion for same-day preventive care services such as routine blood work or urinalyses is typically low. Clients aren't always prepared to commit or pay for additional testing and can be caught off guard or need more time to consider your recommendations.
- Your technology causes delays and backups:** Shaky internet, slow service, or software problems can bring your day to a screeching halt. Software that doesn't integrate perfectly forces staff to stitch together multiple solutions via workarounds and manual or duplicate data entry.

Use these challenge areas to prioritize the areas of your practice's client communications that can be improved via workflow adjustments or integrated solutions.

5 tips for improving client communication



#1 Prepare your clients ahead of time

Good communication starts before a pet's appointment. Inform clients about your hours, policies, and protocols via email, social media, and your website. If you cannot send a message out to your contact list through your practice management software, look into using a communications solution that integrates directly with your practice management software, preventing duplicate or missed communications and ensuring all information is synced to the patient record. Clients will have a consistent source of guidance to help prepare them for their appointment—including reminders about what time to arrive, what to bring, and options for add-on preventive testing.



#2 Make clients aware of all your communication channels

Reduce call volume by using your practice management software or client communications applications, and encourage clients to use these channels to self-serve and access information on demand. You can manage appointment requests, confirm existing appointments, send and receive prescription refill reminders and requests, and share pet vaccine and health records through convenient technology solutions. Additional post-visit communication such as non-urgent follow-ups, client surveys, and normal test results can also eliminate call volume and increase your team's focus and availability for in-clinic care.





#3 Use online forms

Instead of having your team members wait while an owner fills out a check-in form or relays patient history details, streamline your check-in process by having clients complete forms prior to their appointment. Clients will fill in information more completely and accurately when they do not feel rushed, and your team members won't waste precious time standing around waiting. You can also have clients complete digital consent forms prior to diagnostics, anesthetic procedures, or euthanasia. You can create a variety of digital forms using online programs. For maximum efficiency, ensure clients are able to view completed digital forms, medical records, and diagnostic results via a self-service portal or app versus calling the practice.





#4 Offer instant messaging

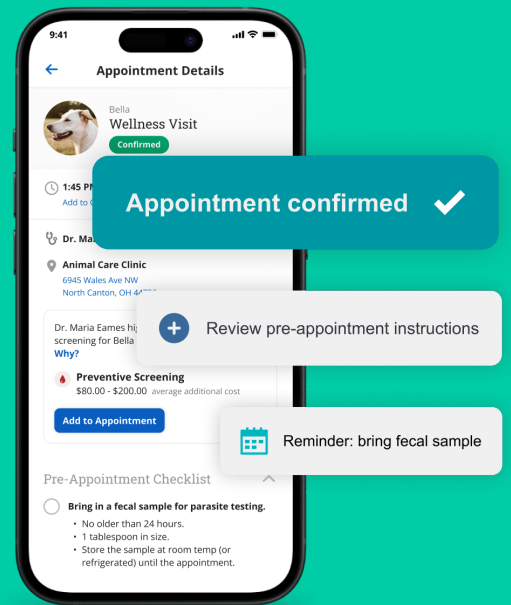
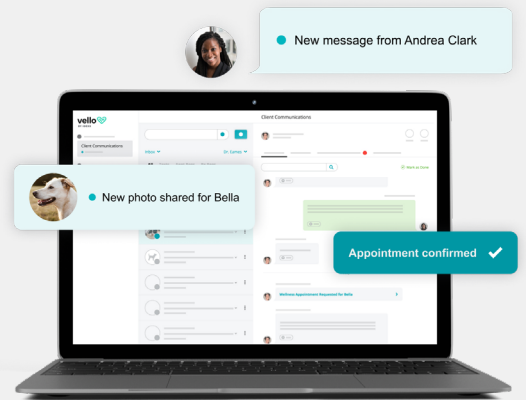
Texting allows your clients to send you a quick message if they have a question about their appointment, or they wonder whether their pet needs to be seen. Triageing patients via text or another instant messaging platform will also cut down on unnecessary phone calls and allows clients to share photos or videos of their pet's concerning problem or behavior. You can also text a client with an anxious or reactive pet ahead of their appointment to let them know that there are other clients in your lobby, and they may prefer to wait in their car.

Two-way communication platforms also allow your team to keep in touch with clients when they need you most—such as after a procedure or a diagnosis involving at-home care (e.g., diabetic monitoring, hospice). This convenient and efficient support ensures compliance, enhances loyalty, and demonstrates an ongoing commitment to pet and client care.



#5 Choose the right technology

Effective and efficient client communication relies heavily on having the right technology in place. Choose practice management software that is customized to meet the needs of your veterinary practice and that offers integrated client communication capabilities that will ensure your client communications are as streamlined as possible.



“Good communication is the bridge between confusion and clarity.” –Nat Turner

Planning ahead for future communication success

What should you think about in terms of expanding and evolving your practice's client communications?

Here are several points to consider

- What tools does your practice need to make client communication more efficient and effective?
- Does your practice provide multiple ways for clients to reach you?
- Do you have reliable communication channels established such as email, text, social media, and a website?
- Does your current practice management software meet your client communication needs?



The right practice management software should make client communications easier.



What should you look for in a client communications solution?

Cornerstone practices need a communication solution that reduces manual workload, improves compliance, and keeps clients engaged—all while integrating seamlessly with your existing workflows.

Here is what Vello for Cornerstone was built to deliver

Automated appointment reminders

Automated email and SMS reminders are customizable by reason for visit, instantly syncing confirmation status to Cornerstone while updating the communications log in real time and providing a convenient unconfirmed appointments dashboard for daily management. Custom instructions by reason for visit and a convenient fecal sample checklist allow you to set your clients up for success and drive compliance automatically.

Medical service reminders

Medical service reminders are sent by SMS and email to help you reach more clients, built with a convenient link to request an appointment and access customized education to reinforce all recommended care. Postcard reminders allow you to get in front of even your hardest to reach customers. Online scheduling requests are on your terms. Vello pulls from your practice's preferences and live Cornerstone scheduler availability, ensuring all requests align with your workflow.

Two-way SMS

Enjoy the ease of two-way texting with a dedicated local phone number, quick-reply templates, the ability to send and receive photos, and OOO replies—all while automatically syncing to your communications log in Cornerstone for a seamless record of client interactions.

Diagnostic screening recommendations

Start the care conversation before your clients even enter the door with Vello's diagnostic screening recommendation and automatic interest writeback to Cornerstone appointment notes.

Pet owner app and web portal

Vello gives your clients instant access to appointment instructions, recommended care, medical records, vaccination history, appointment requests, Rx refills, and more—all through a mobile app and password-free web portal, with no invite codes to manage, ensuring a seamless self-serve experience.

Say hello to Vello for Cornerstone

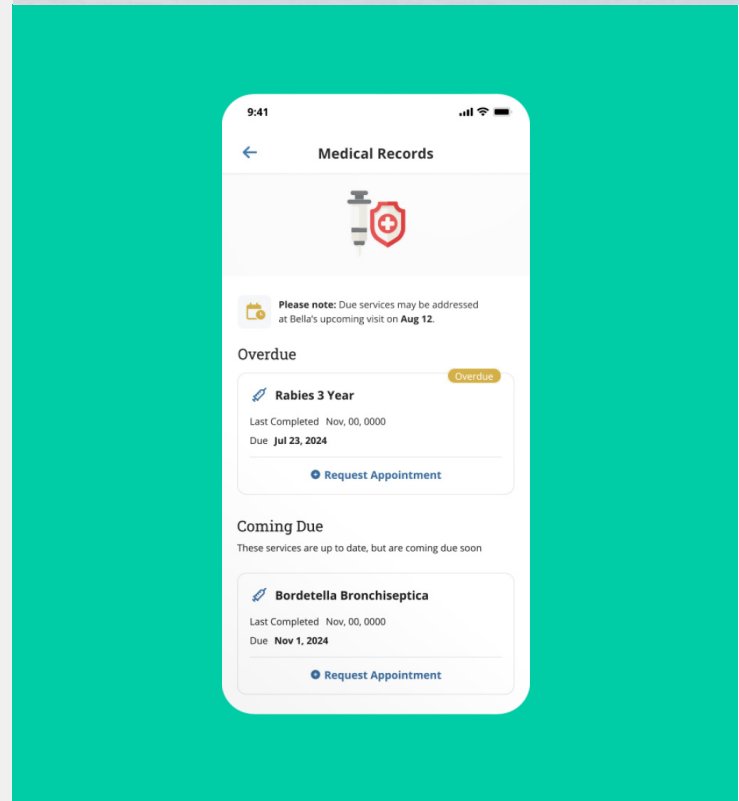
For Cornerstone practices looking to modernize client engagement, Vello streamlines the way you connect with pet owners through a fully integrated experience.

Built alongside the Cornerstone team, Vello delivers unmatched integration with real-time writeback, automated workflows, and seamless setup. Designed to drive compliance and reinforce your standard of care, Vello makes it easy to keep clients informed, improve compliance, and reduce administrative workload—all while ensuring a complete record of communications directly within Cornerstone.

By simplifying and automating client communication, Vello allows your team to focus on what matters most—exceptional patient care.

Learn more about
Vello for Cornerstone

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