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Your onboarding guide to Vetstoria:

Real-time online booking and automation platform for vet practices
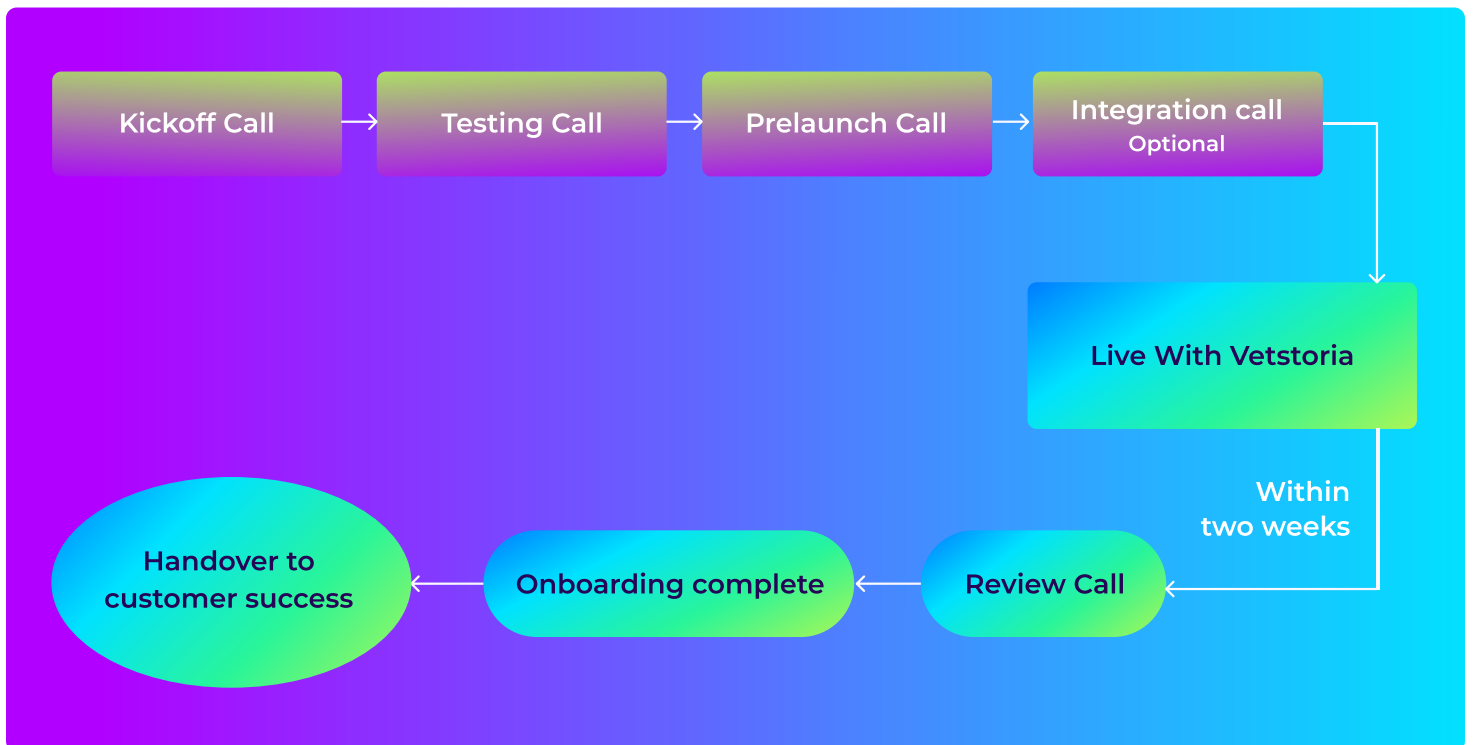
Welcome to Vetstoria. We're excited to have you!

In the following pages, you will learn all about our onboarding process. Vetstoria helps you to reduce phone calls and improve the pet owner experience through automated appointment scheduling and complete integration with your PIMS. So here's to saving time and reducing front-desk stress!

A quick overview of our onboarding process:

Kickoff Call → Testing Call → Prelaunch Call → Integration call Optional

Live With Vetstoria

Within two weeks

Handover to customer success ← Onboarding complete ← Review Call

1 | Ready to onboard?

As we discussed during the demo, we have set up an account for you with the appointment types, how each practice operates, the schedules and other customizations that would work well for all practices across the board.

The complete onboarding process may take 2-3 calls but less depending on the API integration and the requirements of the corporate. In case you haven't, please book your kick-off call to proceed with the rest. We'd like the "Vetstoria champion" to spearhead this but if you are yet to appoint one, please do so.

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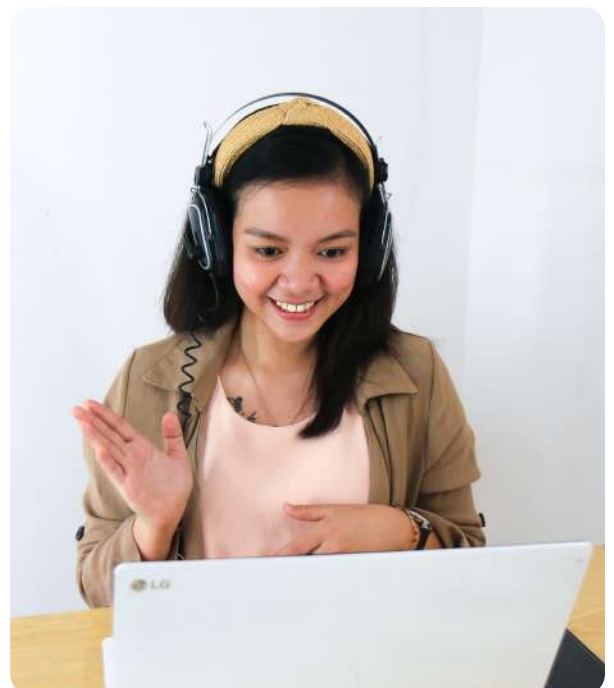
2 | Get ready for the kickoff* call.

What happens during the kickoff call?

Objective:
Set onboarding expectations for the practice.

Duration: 30 minutes

*In some cases, you would have already had a call discussing overall goals - in that case a kickoff call may not be required.

**This may vary depending on whether we need to tackle multiple practices or features. Vetstoria champions should attend this call.
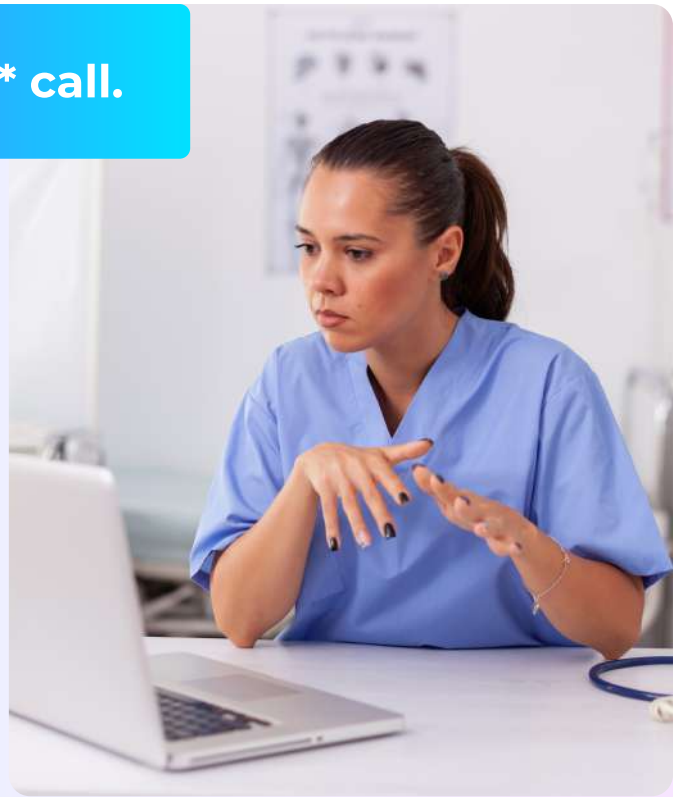
In this call, we will:

- Introduce the Vetstoria team, the client services representative, and the tech support agents who will support the implementation.

- Explain the timeline and the stages of onboarding.

- Introduce you to our digital adoption platform and our knowledge base. We will also provide logins to these resources.

- Share various Vetstoria support channels available to you, including live chat, email, and logging tickets.

- API Introduction - A brief introduction to what the practice needs to be aware of during the API request procedure as this differs for each PIMS.

Once we are done, we will set up a time with you for the test call.

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3 | Test Call: Connect and customize

After the kickoff call, your assigned onboarding and implementation team will work with you to customize your PIMS and ensure the platform is set based on your preferences.
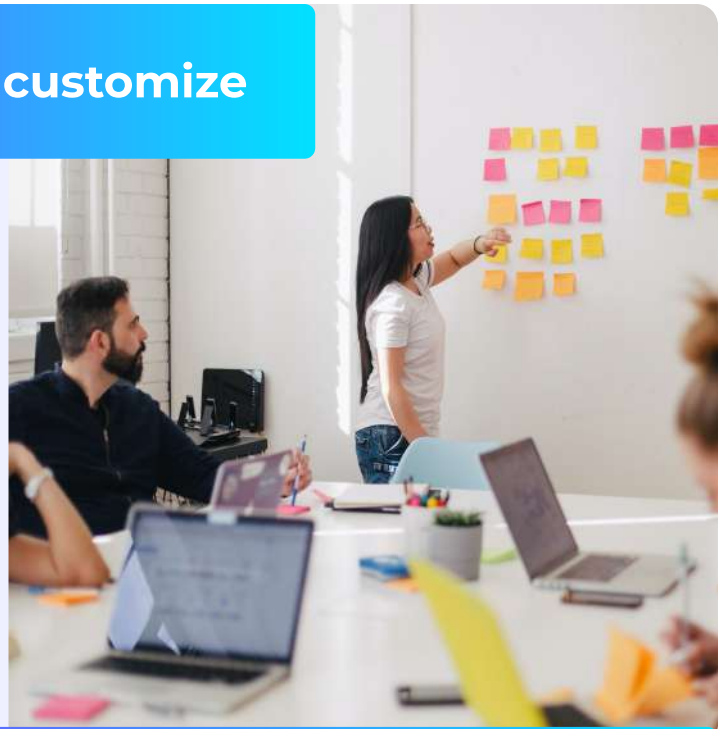
Objective:
Test the platform to ensure optimal pet owner and practice experience.

Duration: 1 hour*
*This may vary depending on the number of practices and features.

In this call, we will:

- Go through the checklist (see below) with you to ensure the pet owners' and the practice's journey are smooth, correct, and optimal.

- Check and make any relevant changes if necessary.

- If testing is successful and everything looks good, proceed to schedule the prelaunch call.

Before going live: Your checklist

Here's a list we recommend completing before going live with Vetstoria. During this process, we will also explain how to match appointments with your PIMS.

Double-check:

☐ Availability, appointment types, species, and schedules.

☐ Time slots available online match availability in the PIMS calendar.

☐ Online appointment appears in the PIMS calendar with the expected date, time, vet, and room.

☐ Rescheduling and cancellation notification to pet owners.

Testing 1, 2, 3 ...

- Provide the test link to your front-desk team.

- Ask them to book two appointments online:
  - Book an appointment for a pet.
  - Create a new client booking.

These checks will help your team learn:

→ Learn how online booking works.

→ See how online bookings look in your PIMS.

→ Understand matched versus unmatched appointments.

→ See how the pet owner journey is displayed.

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4 | Your Prelaunch call with Vetstoria

You will have completed testing by this time, and the platform should be ready to go live.

Objective:
Provide training for your account and make any final changes before going live.

Duration: 45 minutes

In this call, we will review:

- Your account at a higher level, covering all the critical capabilities of the platform, including:
  - Scheduling customizations, disclaimers, system messages, appointment screening, slot exclusions.
  - Digital marketing.
- The booking widget, reminders, and other integrations like Facebook, Google Business Profile, and Instagram.
- How you can educate pet owners about booking appointments online. Check out the Vet Vault for more resources and to explore other avenues, such as:
  - Adding a message to your hotline.
  - Promoting online booking on your social channels.
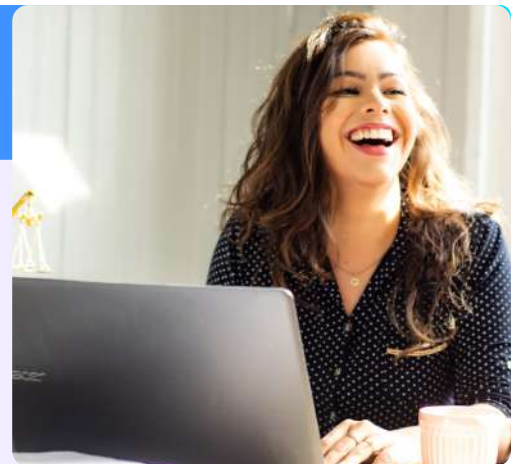
4.1 | Integration call (optional)

Objective:
This is an optional call to double-check booking links on various points of integration depending on the requirements of your veterinary group or corporate.

Duration: 30 minutes

In this call, we will:

- Guide you through integrating booking links into your social media pages and assist with accounts such as Google Business Profile (formerly Google My Business).
- Enable booking links via in-house reminders and QR codes.

  Review your website links.

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After we configure the account to your liking, test the features, and train your team, you will be ready to go live. We will share all the relevant links and codes with your digital team so they can add them where appropriate.

5 | Scheduling your review call

Within two weeks of going live, we will schedule your first review call.

Objective:
Review your journey with Vetstoria so far.

Duration: 15 minutes

In this call, we will:

- Review the setup and integration to ensure everything is working well.

- Get feedback from your team and pet owners' responses to Vetstoria.

- Introduce you to your dedicated customer success (CS) manager.

What's next?

Once we introduce you to the CS representative, they will schedule regular reviews and proactively help you make the most of Vetstoria. Plus, you'll get on-demand support from our global support team, which is accessible **via email, live chat, and phone calls.**

Scan the QR code

Get in touch with our support team

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