

Your onboarding guide to Vetstoria:

# Real-time online booking and automation platform for vet practices

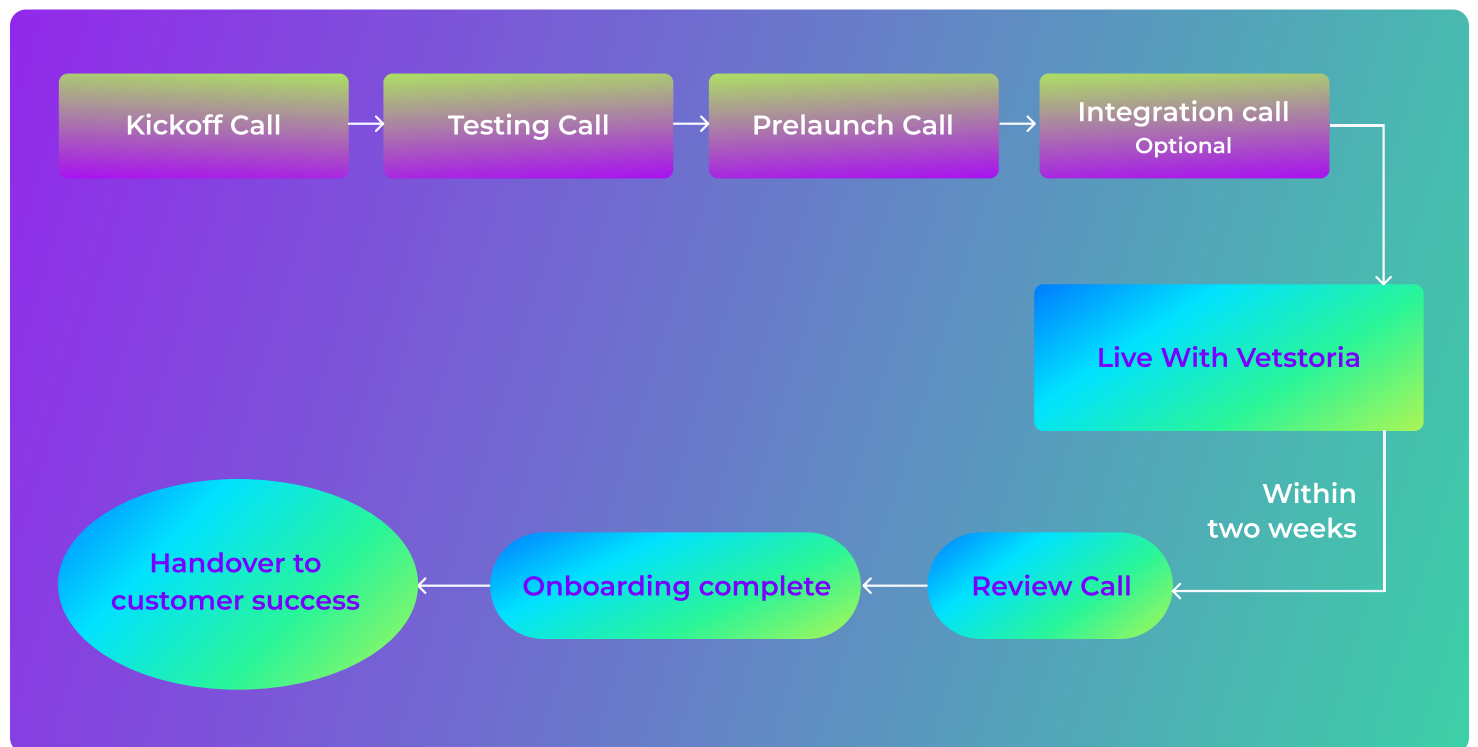


# Welcome to Vetstoria! We're excited to have you!

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!



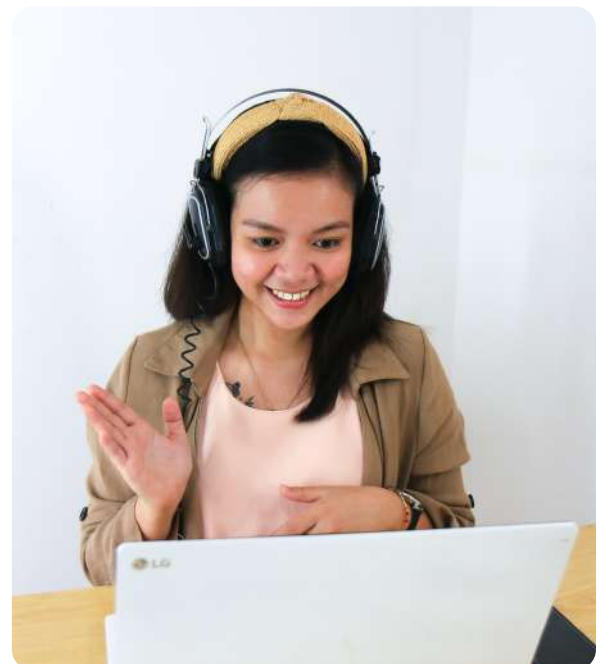
A quick overview of our onboarding process:



## 1 | Ready to onboard?

You've probably submitted your registration form, and here we are. Your billing will start 30 days from the registration completion date unless agreed otherwise. **Please book your kickoff call** with the onboarding team to get started with an overview of the process.

You will need to identify your "Vetstoria champions." They will spearhead the adoption of Vetstoria and act as our main point of contact. **We recommend appointing two champions.** In case one is on holiday, the other can take over.



## 2 | Get ready for the kickoff call.

What happens during the kickoff call?



**Objective:**

Set onboarding expectations for the practice.



**Duration: 30 minutes\***

\*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.
- Introduce API and briefly discuss what the practice needs to be aware of during the API request procedure. This differs for each PIMS.
- From your end, we would like to understand:
  - How each practice operates, such as scheduling in PIMS, per room or vet, special requirements, etc.
  - The expected timeline to go live. This is especially important.
  - Key performance indicators (KPIs) for the practice. This might include acquiring new clients, booking appointments outside of business hours, reducing call volume, reducing no-shows, etc.

After this call, we will work to set up your account and API accurately. We will also set up a time with you for the test call.



## 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 the pet owner and practice experience is optimal.

 **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.
- Understand matched versus unmatched appointments.
- See how online bookings look in your PIMS.
- See how the pet owner journey is displayed.

## 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 cover:

- 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.



**Duration: 30 minutes**



### In this call, we will:

- Guide you through integrating booking links into your social media pages, including Facebook and Instagram.
- Assist you with linking your Google Business Profile (formerly Google My Business).
- Enable booking links via in-house reminders and QR codes.
- Review your website links.

After we configure the account to your liking, test the features, and train your team, you will be ready to go live. We're happy to assist you throughout the process until you're ready to hit launch.



## 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