

HOW TO: Supercharge Your Veterinary Clinic with AI

A hands-on workshop for veterinary teams.



by **Adam Greenbaum**



Adam Greenbaum

I'm Liz's husband and proud dad to Sophie (the boss of the house), Nala (the queen cat), and Cosmo (the professional goofball). I'm also a longtime tech nerd and AI enthusiast.

Back in 2016, I founded WhiskerCloud to help veterinary clinics look better online and grow smarter—with great design, storytelling, and a whole lot of marketing automation. We ended up working with over 10,000 clinics around the world after being acquired by PetDesk in 2022.

These days, I'm building something close to my heart: a new platform that supports pet parents through end-of-life care. And I'm using AI to build most of it—because honestly, it helps me move at 50x speed (and I'm not even exaggerating).

Meet my kids.



Sophie




Nala





Cosmo

What we're discussing today:

 **How ChatGPT Works** → We'll break it down in simple terms so you understand what it can (and can't) do.

 **How to Use It Like a Pro** → You'll learn how to write clear, detailed prompts that get great results in your voice and style.

 **Real-World Clinic Use Cases** → We'll explore practical ways to use ChatGPT in your hospital, from client emails to SOPs to medical note summaries.

 **Live Demos + Q&A** → You'll see it in action, try it yourself, and leave with tools you can use right away.

Why do we use AI?

🕒 **Time-Saving** → ChatGPT helps you knock out tasks in minutes instead of hours.

✅ **Fewer Errors & Miscommunications** → Clear, consistent messaging means less back-and-forth and fewer mistakes.

📝 **Easier Content Creation** → Whether it's emails, SOPs, or social posts — it takes the heavy lifting off your plate.

😊 **Happier Clients + Less Stress on Staff** → Better communication leads to more satisfied clients and a smoother workflow for your team.



What is ChatGPT?

- **ChatGPT is a type of AI called a Large Language Model (LLM)** → It's trained to understand and generate human language by predicting what comes next in a sentence.
- **It was trained on hundreds of billions of words from books, websites, articles, and more** → Imagine reading everything on the internet — it's like the most well-read, informed person on Earth.
- **It doesn't "think" like a human, but it can answer questions, write emails, summarize info, and more** → It's shockingly good at understanding what you're trying to say and giving back useful, human-sounding answers.
- **It's like having a 24/7 genius assistant who's read everything and is always ready to help** → You bring the veterinary knowledge — ChatGPT brings speed, clarity, and creativity.

ChatGPT is like a super helpful librarian who has read every book in the world.



How AI works for *you*.

🧠 **It learns patterns in language** → Just like you notice patterns in patient cases, ChatGPT notices patterns in how people write and speak.

🔤 **It predicts the next word based on context** → It doesn't think like a person — it just looks at your prompt and tries to generate the most likely and helpful response.

❌ **It doesn't "know" facts — it makes really smart guesses** → So while it can write an email or summarize a note beautifully, always double-check anything medical or factual.


🎯 **It works best when you guide it** → The more clearly you explain what you want (tone, details, format), the more it acts like a great assistant who's aligned with your clinic's needs.


How to Use AI Like a Pro


Your Inputs = Your Outputs


Let's be real — if you give ChatGPT a lazy prompt, you'll get a lazy response.

But when you put in just a little effort and clarity, it becomes one of the most powerful tools you'll ever use.

 **Be Specific** → Tell it exactly what you want. Don't make it guess.

 **Give Context** → Who is this for? What's the tone? What's the goal?

 **Include Examples or Formatting Styles** → Show it what "good" looks like — and it'll match it.

 **Ask It to Rewrite, Clarify, Summarize, or Translate** → Don't settle. If it's not perfect, tweak your prompt and ask again.

Use AI to hire (and retain) better.

Why is this important?

The 2024 AAHA "Stay, Please" study, released in February, provides insight into retention challenges, finding that 30% of veterinary professionals in clinical practice plan to leave their current role, with half of those (15% total) planning to leave clinical practice entirely.

That's wild!



This is a bad prompt.

"Write me a detailed job description for a veterinary practice manager."

This is a good prompt.

If I wanted a really great job description to hire a new practice manager for our veterinary clinic, what information would you need from me to make it really pop?

Take the time to do this!



Clinic-Specific Info

- **Clinic name** and **location**
- Type of practice (general, emergency, specialty, mixed, mobile)
- Number of DVMs and support staff
- Clinic culture — how would you describe the vibe? (e.g., fun and fast-paced, family-style, focused and clinical)
- Any certifications (e.g., AAHA, Fear Free, Cat Friendly)
- Mission or values statement (or a quick sentence or two that captures your purpose)



What You're Looking for in a PM

- What kind of personality would *thrive* with your team?
- Do you want someone seasoned and strategic, or hands-on and scrappy?
- What are your *must-have* skills? (e.g., leadership, financial acumen, staff coaching, conflict resolution, client service, etc.)
- Any tools/software they need to know? (Cornerstone, Avimark, ezyVet, etc.)



What They'll Be Doing

- What are the top 3–5 responsibilities this person *really* needs to own?
- Will they be supervising the whole team or just the client service staff?
- Will they be involved in hiring/firing? Payroll? Marketing?
- Are you expecting them to improve KPIs, client retention, or operational flow?



Why Join You?

- What sets your clinic apart from others in the area?
- Any perks or benefits you're proud of? (e.g., team outings, CE budgets, growth opportunities, 4-day workweeks)
- What kind of mentorship or support will this person receive from ownership/leadership?



Optional but Awesome Touches

- A quote from a current team member about what they love about working there
- A short paragraph describing a “day in the life” of this role
- Fun facts (e.g., “We celebrate every team member’s birthday with cake and a Spotify dance party.”)
- Links to your website or social media pages

I did the homework for you.

Clinic-Specific Info

- **Clinic Name:** Lake Eola Veterinary Center
- **Location:** Downtown Orlando, Florida — five minutes from Lake Eola Park and a quick hop to Winter Park’s restaurants and cafés
- **Type of Practice:** Full-service small-animal practice with a big emphasis on preventive care, dentistry, and client education
- **Team Size:** 4 full-time DVMs, 1 regular relief doctor, 12 support staff (RVTs, CSRs, and assistants)
- **Clinic Culture:** Think “boutique hospitality meets neighborhood family.” We’re upbeat, organized, and love adding a personal touch—paw-print lattes for clients, birthday shout-outs for pets, and plenty of team high-fives.
- **Certifications:** AAHA-accredited, Cat Friendly Practice
- **Mission:** To deliver gold-standard, compassionate medicine while fostering a supportive, growth-oriented workplace. We treat every pet (and person) like family, communicate clearly, and never stop learning.

What We’re Looking for in a Practice Manager

- A servant-leader who can inspire, coach, and jump in wherever needed.
- A master of both “front” and “back” of house—scheduling, HR, inventory, and vendor relationships—while keeping the vibe warm and welcoming.
- Comfortable with data, budgeting, and PIMS (we’re on Cornerstone but open to your favorites).
- Minimum two years of veterinary management experience; CVPM, social-media know-how, or multi-site leadership a big plus.
- Someone excited about growth—ours and theirs.

What They’ll Be Doing

- Coaching CSRs and techs, championing doctor efficiency, and keeping patient flow smooth.
- Owning operations: schedules, payroll, inventory, vendor negotiations, and compliance.
- Designing unforgettable client experiences from first call to last follow-up.
- Leading HR efforts—recruiting, onboarding, performance reviews, and career paths.
- Partnering with ownership on KPIs, marketing campaigns, and long-term expansion plans.
- Driving innovation: new tech, forward-booking strategies, wellness plans—you name it.

Why Join Us?

- **Sunshine Lifestyle** – morning walks around Lake Eola, lunch breaks in the park, and year-round farmers markets.
- **Supportive Culture** – every voice is heard; ideas move fast.
- **Perks That Matter** – medical, dental, vision, 401(k) w/ match, generous PTO, CE stipend, uniform allowance, and big employee-pet discounts.
- **Shape Our Future** – we’re growing and eager for your fingerprints on everything from workflows to community outreach.
- **Feel-Good Extras** – monthly team breakfasts, wellness challenges, paid volunteer days, and an annual staff retreat (last year: a private Airboat tour through the Everglades).

Fun Add-Ons

- **Team Quote:** “I’ve never seen a clinic where laughing and learning happen every single day—and I’ve been in vet med for 15 years.” — Maria, Lead CSR
- **A Day in the Life:** Coffee and a quick stand-up at 7:45 a.m. You confirm coverage, smooth out the surgical schedule, and greet Mr. Rodriguez’s anxious Lab with a chilled towel and a treat. After reviewing inventory counts, you coach a new tech on catheter placement best practices, then jump into a marketing meeting to plan next month’s heartworm campaign. By 3 p.m. you’ve finished payroll, conducted a growth check-in with a rising CSR, and still found time to help restrain a wiggly Frenchie for radiographs—before heading out for a sunset stroll around the lake.
- **Website/Socials:** [w](#)Coming soon at www.LakeEolaVet.com | Follow the journey on Instagram [@LakeEolaVet](#)



Now it's time to interview better.

Ask ChatGPT about the above prompt, and ask what interview questions you should ask.

The prompt: *"Based on the provided information and job description we created, help me come up with five interview questions, and explain what answers I should look for and why."*

Interview question example:

“Tell me about a time you had to handle a conflict between two team members. How did you approach it and what was the outcome?”

What to look for:

- Empathy and professionalism in approach
- A solution-oriented mindset that doesn't ignore emotion or dynamics
- Demonstrated leadership in resolving the conflict without escalating it
- Willingness to coach and follow up with both parties afterward

Why it matters:

Team harmony is key in a tight-knit clinic — you want someone who's emotionally intelligent and can maintain morale while addressing issues head-on.

Red flags:

- Blaming one person without acknowledging nuance
- Responses like “I told them to just work it out” or “I let it go because it resolved itself”

Use AI to create better SOAP notes.

I am a veterinarian at Lake Eola Veterinary Center in Orlando, Florida, and I need your help turning my appointment notes into clean SOAP notes. Here are my notes:

Date: 5/23/25

Pt: Max, 4yo MN Lab, 32kg

Owner: Jane D.

CC: V+ D+ x2d, off food, tired

- Jane says Max throwing up 3-4x/day, yellow + some kibble, since Wed. Loose stool, watery, 5-6x/day, no blood seen.
- Not eating since Tues, drank a bit but puked after. Was at dog park Mon. No new food/garbage.
- UTD vax, on HW/flea prev. No cough/sneeze.
- T 101.7, P 88, R 26, wt down ~1kg. Looks ~5% dehydr, tacky gums, CRT 2s.
- EENT ok, ears clean, eyes clear.
- Heart/lungs NAD. Abd soft, bit gurgly, no pain.
- Skin good, no fleas. Moves fine, no limping.
- Fecal neg. PCV 43%, TS 7.1, gluc 94. Parvo neg.
- Gave 1L LRS SQ. Cerenia 2mg/kg inj. Metro 500mg BID x7d, FortiFlora x2wk.
- NPO 12-24h, then bland diet (chk/rice).
- R/o GI bug vs FB vs panc.
- Recheck 5d or if worse. Call w/ update 2d. Told Jane watch for blood/worsening.

Dr. AG

Follow-up Emails

Once you have your cleaned up SOAP notes, we're going to have our follow up with an email to the owner. Reply in the same ChatGPT thread with: **Perfect. Now please write me a follow-up email for the client, [name], about today's visit with [pet's name].**

Use AI to create SOPs!

I believe whole-heartedly in creating SOPs, but creating them is not fun. It's a lot of time and effort, but AI solves that.

Whether you have a process for anything or not, AI can help be your assistant. Let's say you do not have a process for what to do when someone calls to request records go to a new clinic because they are moving on from working with you.

Go to ChatGPT and prompt ▶ "What would be everything that needs to happen when a client calls a veterinary clinic to request records because they are moving to a new clinic?"

Once it gives you the information, ask it to make a formal SOP for your clinic based on the information it knows about you. The follow up prompt to the above question would be ▶ "Create an official SOP for Newport Beach Animal Hospital on what to do when a client calls and requests records because they are moving to a new veterinary clinic."

Boom! You have your first SOP.

Now, you can ask ChatGPT to provide you the information in PDF or .doc format, and save it somewhere everyone can have access to it. Moving forward, you can upload that SOP and ask ChatGPT to help you create SOPs in the same format for anything.

Remember **!** input = output. The more information you give AI about your SOP, the better the SOP will turn out.

Unsure where to start with SOPs?

You can ask ChatGPT for help with that, too!

Ask, "What are common SOPs for a veterinary clinic?" In an instant, you'll get SOP ideas for all categories.

Here's an example:

 Client Services / Front Desk SOPs

1. Client Check-In and Check-Out Procedure
2. Appointment Scheduling and Cancellation
3. Phone Call Handling and Call Triage
4. Medical Record Request & Release
5. New Client Intake Process
6. Payment Collection and Billing Protocol
7. Client Communication and Follow-Up (Post-Visit, Reminders, Lab Results)
8. Handling Difficult Clients or Complaints
9. Client Education Material Distribution
10. End-of-Life Client Support & Grief Resources

Now, you can create a version of each of these for your clinic. And if you already have certain things for any of these, be sure to mention it to ChatGPT when asking for help creating these SOPs.

Create an SOP for Handling External Online Pharmacy Prescriptions

Why is this so important?

- **Ensures legal compliance and patient safety:** A clear process helps the clinic meet state regulations and avoid medication errors.
- **Protects the clinic and team:** Documentation reduces liability and provides a record in case of disputes or mistakes.
- **Creates consistency and saves time:** Staff follow the same steps every time, reducing confusion and improving efficiency.

Ask first, "What information would you need from me to create an SOP for a veterinary team whose clients want to fill a prescription with an external online pharmacy?" We want to have everything covered from client request to interactions with the online pharmacy, client follow-up, documentation, client follow-up, compliance, and approval.


Write emails with AI.

Veterinary clinics send the same emails over and over and over. You deserve to have templates that make life easier, and AI can help with that.

Today, we're going to do a couple email templates for you.

- Treatment and Aftercare Instructions Email
- Billing and Payment Reminders Email
- Promotional Offers and Discounts Email
- Welcome Emails For New Clients

Ask what AI needs from you.

 What information do you need from me to create a perfect client welcome email for Newport Beach Animal Hospital? We have an app that we use for booking and reminders. We have a subscription plan that we offer. And we have a way to request refills on our website.

You're No Longer New to AI — You've Got This

✓ **You understand how ChatGPT works** → It's not magic — it's a tool trained on massive amounts of text to help you communicate better, faster.

✍️ **You've learned how to talk to it like a pro** → Great inputs lead to great outputs — and you now know how to write prompts that actually work.

💬 **You know how to ask smart questions to get better results** → Whether you're clarifying, summarizing, or creating something from scratch, you're in control of the conversation.

🏥 **You've seen how it can help in your clinic today** → From simplifying medical notes to writing SOPs and job postings — AI is ready to take some weight off your team's shoulders.

Reminder: AI won't replace veterinary professionals — but it will help you spend more time doing what you love: caring for pets and people.

Live Q&A — Let's Build

💡 **What are your ideas for using ChatGPT in your clinic?** → No idea is too small — even simple time-savers can make a big difference.

😞 **What concerns or hesitations do you still have?** → Whether it's about accuracy, privacy, or workflows — let's talk through it honestly.

🔧 **Want to test something live? Let's do it together.** → Share a real scenario from your clinic, and we'll build a prompt and see the results on the spot.



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