

What's Up and Coming in Veterinary Medicine - Part II

Adam Little, DVM

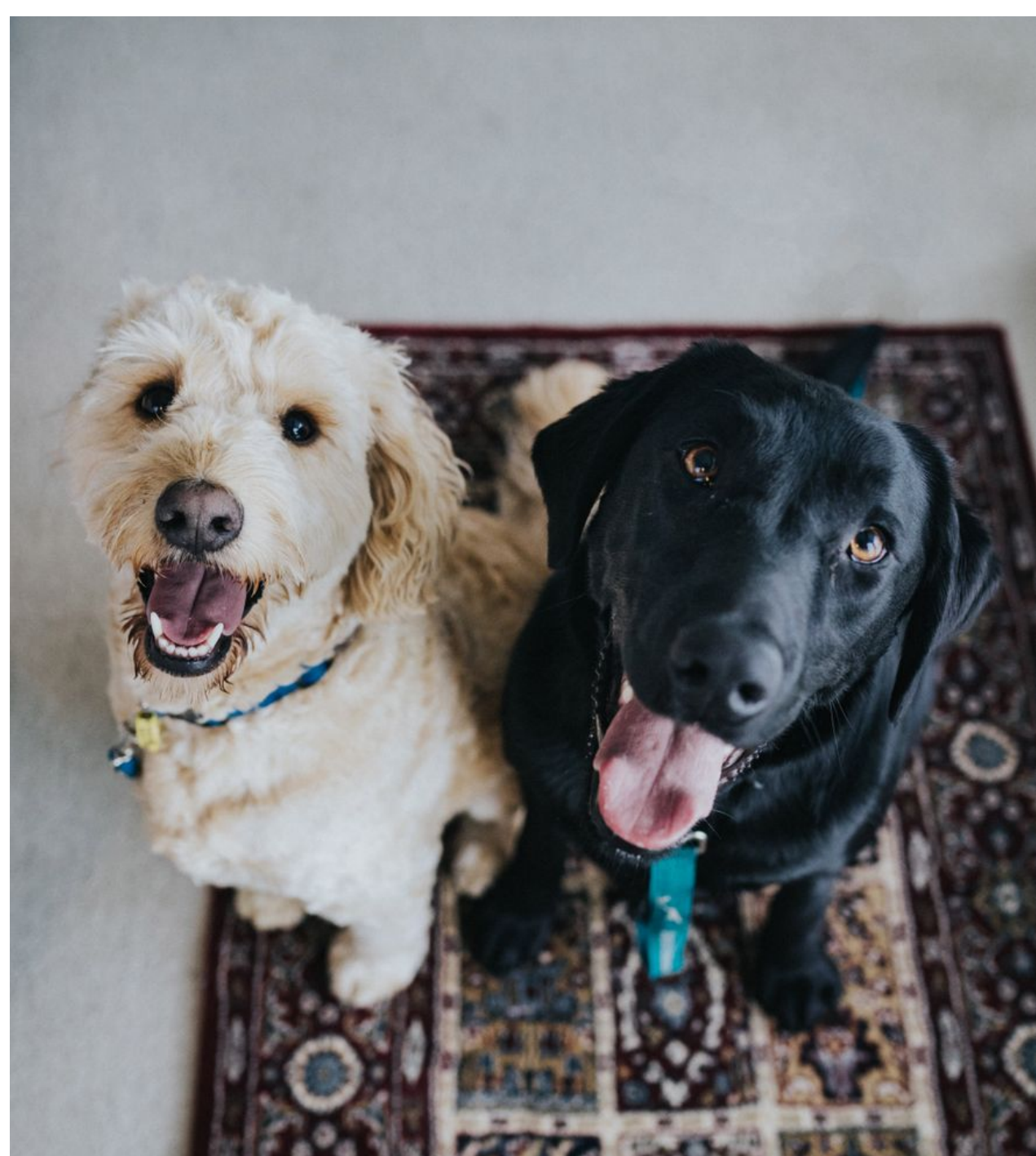
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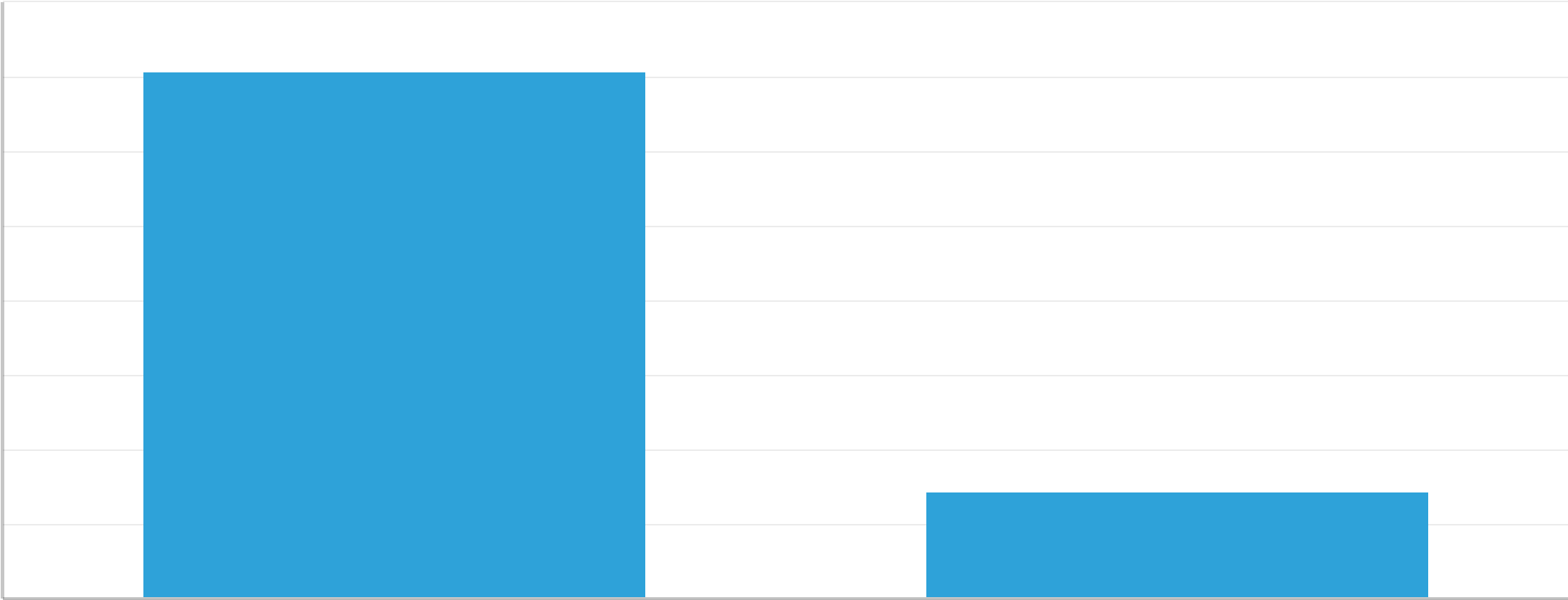
Why Care Needs to Evolve?

**Most pets don't
get the care
they need**



Pets receive 5x less care than AAHA recommendations

Average Revenue Per Patient Over Lifetime

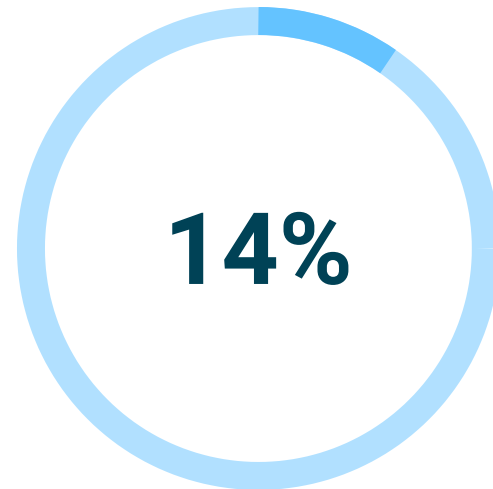


Source: AAHA & IDEXX



This leads to missing critical findings that could help us be more effective in treating pets

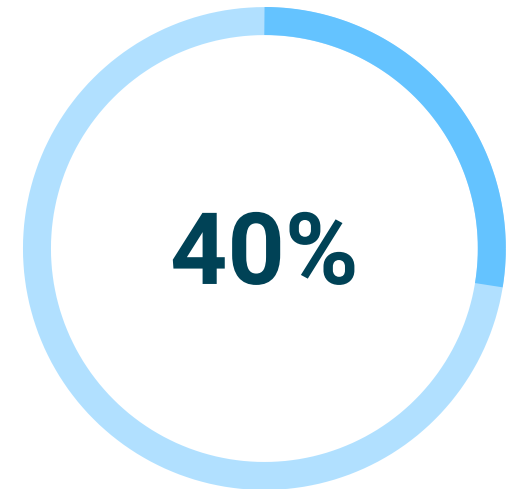
Preventative screenings lead to proactive treatments in:



Adults



Seniors



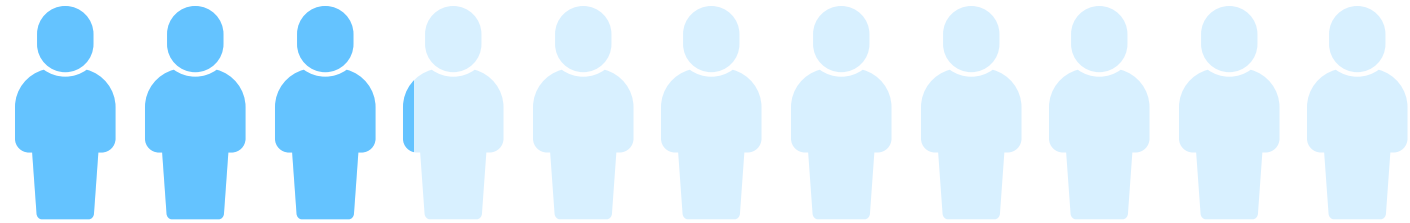
Geriatrics

61%



Have no heartworm preventative purchases at all

28%



of households unable to obtain preventative care for their pet

Traditional Practice Model


- **Brick & Mortar Bound**
- **Limited Flexibility**
- **Repetitive Workflows**
- **Unclear Potential Career Paths**
- **Corporate vs Independent**



It's not easy being a veterinarian

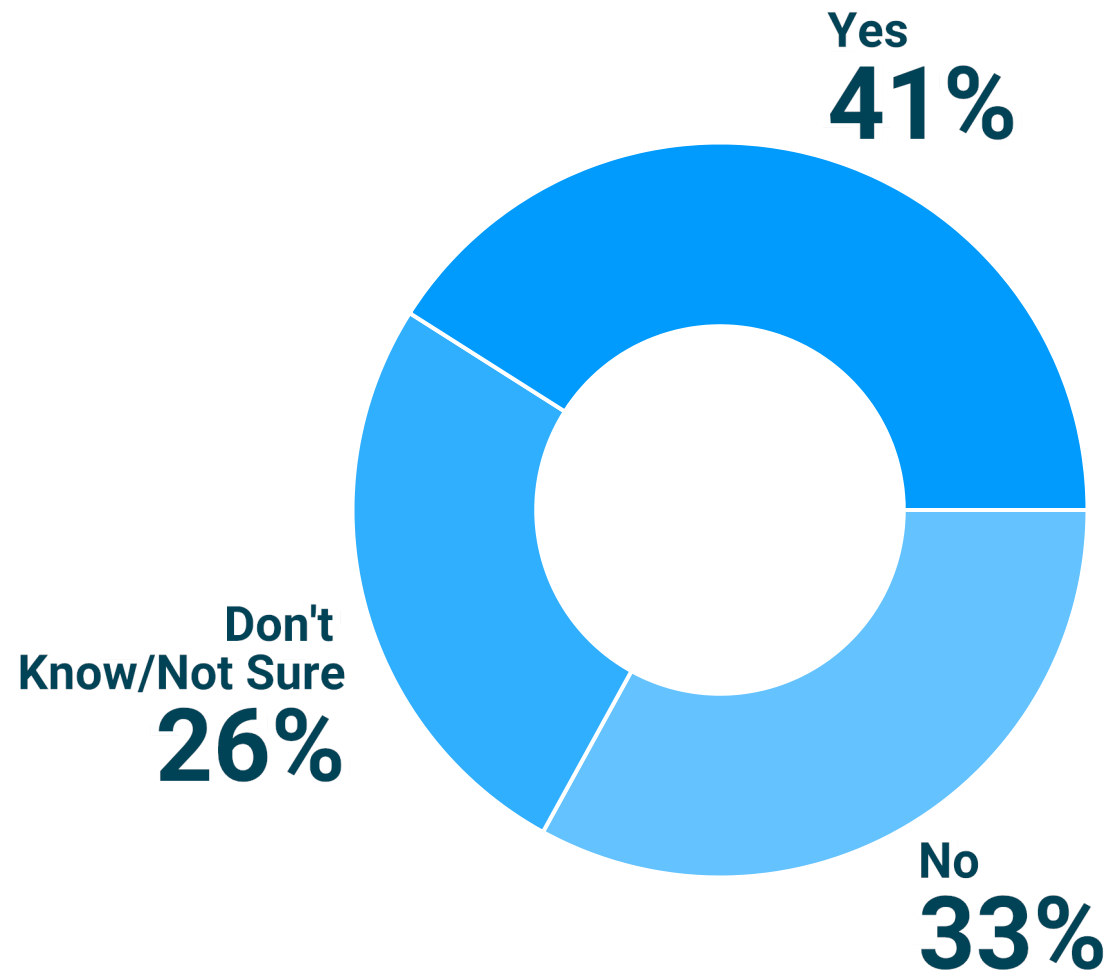
I have to say that I am sick and tired of being made out to be a villain. It's frustrating that I have to spend a large portion of my day debunking myths or disputing claims made by groomers, breeders, pet store clerks, or Dr. Google. Nothing like taking medical advice from your hairdresser or grocery store clerk 😊 FYI, my 8+ years of university means no "alternative facts" here, people. Rant over.

 Like

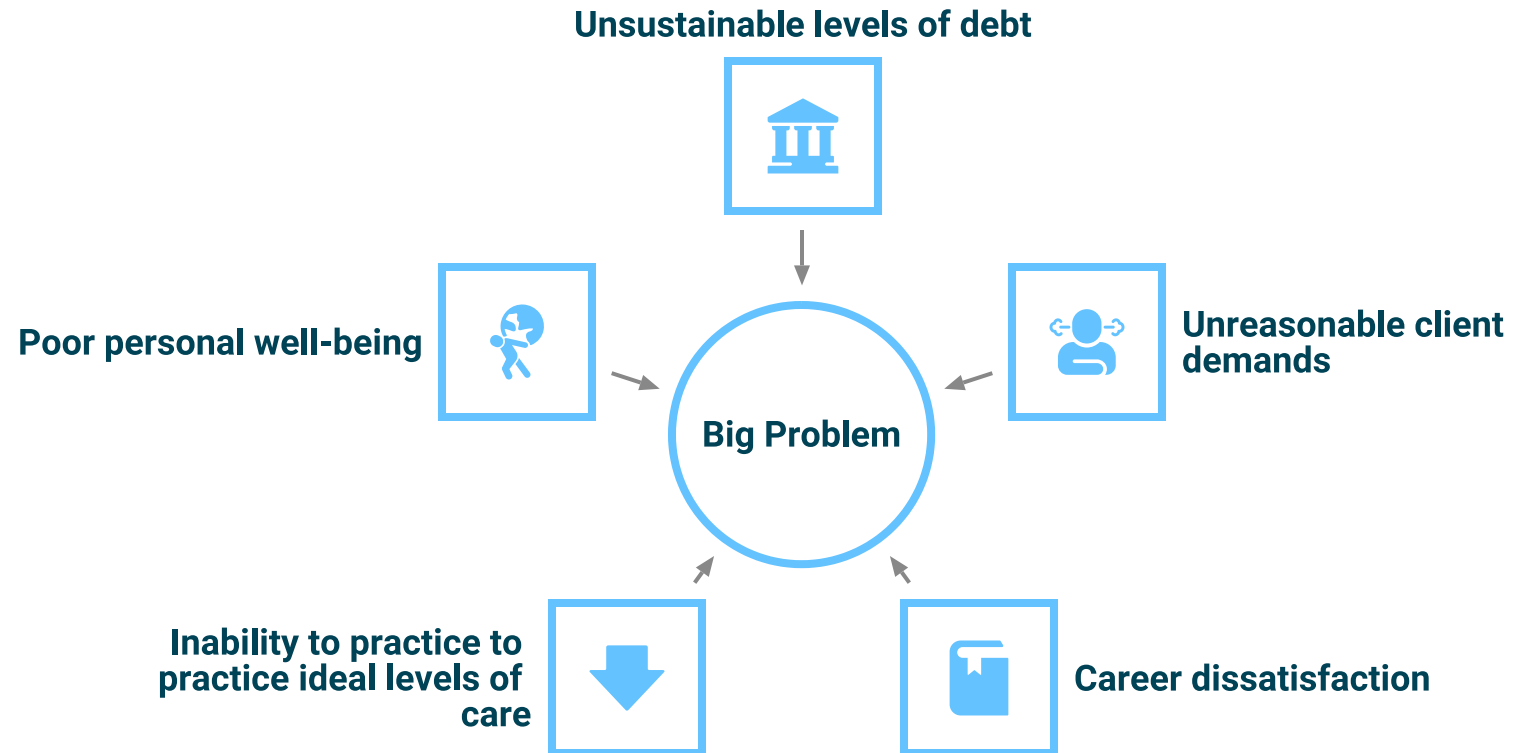
 Comment



Do you recommend a career in veterinary medicine?



Are we reaching at breaking point?



Veterinary Suicide Rate from 1979-2015

2.1x

**of men more likely to commit suicide
than general public**

3.5x

**of women more likely to commit suicide
than general public**

**Without a healthy profession,
we can't deliver healthy pets**

Emerging Models of Care

- **Upgrading Your Practice Experience**

The role of technologies to extend, expand, and enhance the brick & mortar practice

- **Collaborating on Care**

Real-time, multi-colleague case support anytime/anywhere

- **Empowering Individual Veterinarians**

Leveraging the brand, influence, trust, and capabilities of individual practitioners

**What's unique
about this
phone?**



**By creating the platform
which enabled others to
build on top of iOS, Apple
became a dominant player**

Preferred Offers by a Vet or Animal Health Company

Dog Owners

- 1 Offer an online chat or text service
- 2 Provide a list of online resources that I can go to for reliable pet care information
- 3 Offer a monthly payment plan
- 4 Offer some type of loyalty program
- 5 Offer online purchasing & home delivery

Source: Merck, Pet Owner Pathways





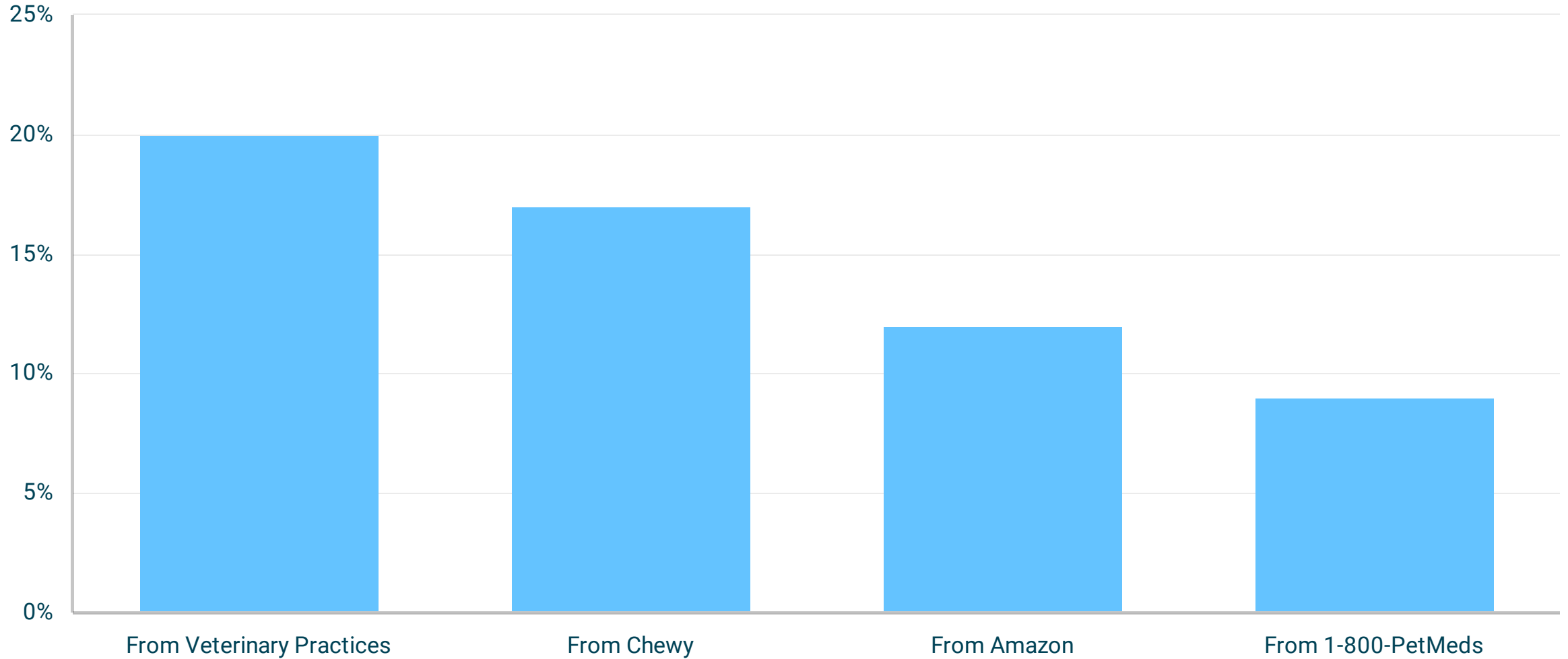
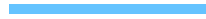
Preferred Offers by a Vet or Animal Health Company

Cat Owners

- 1 Offer a monthly payment plan
- 2 Offer and online chat or text service
- 3 Offer some type of loyalty program
- 4 Offer video consultations
- 5 Provide a list of online resources that I can go to for reliable pet care information

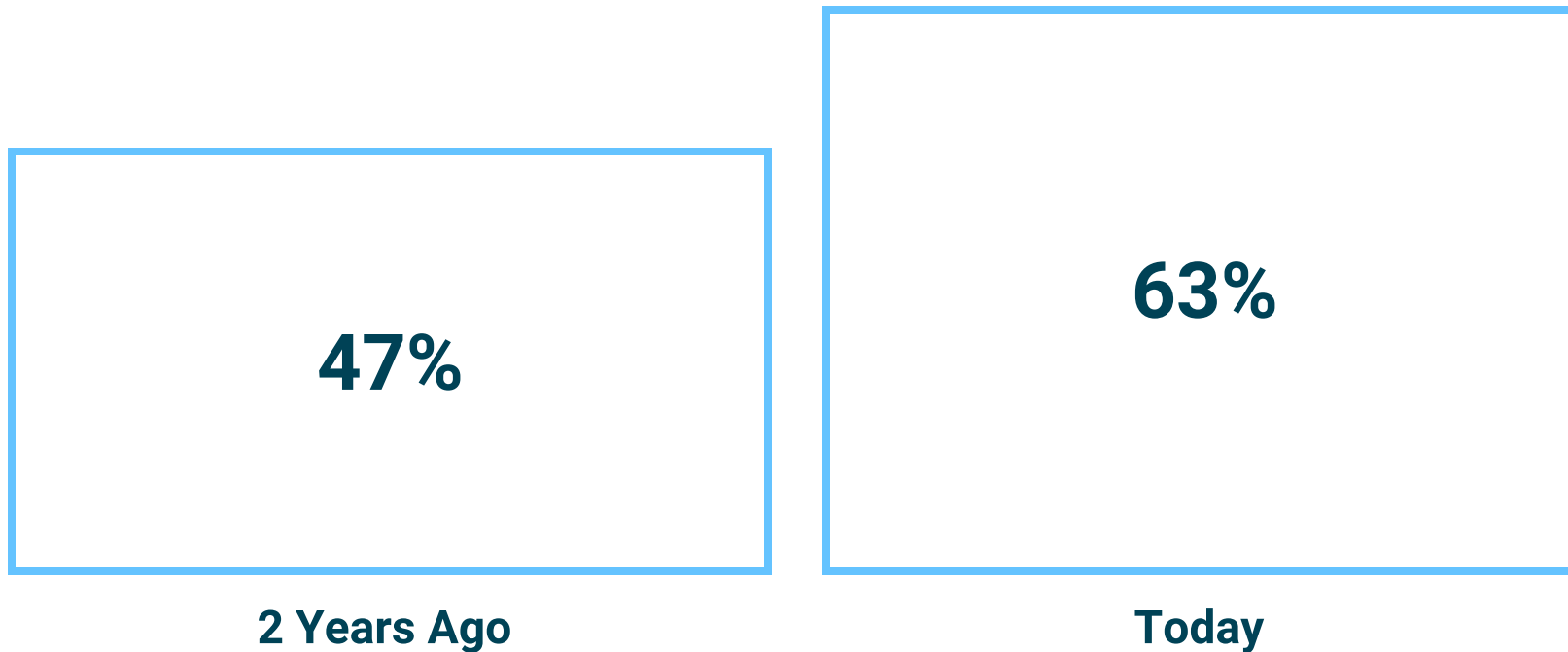
E-Commerce

Pet Owners Purchasing Pet Health Products Online

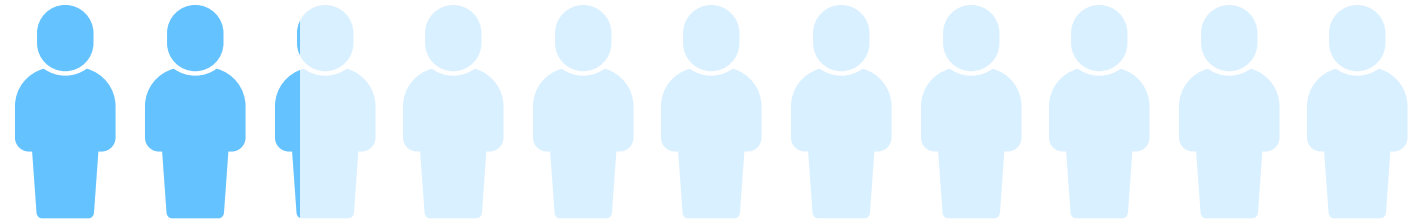


Source: Brakke Consulting: "Pet Health Products: Changing Channels"

Veterinary Practice Adoption of E-Commerce

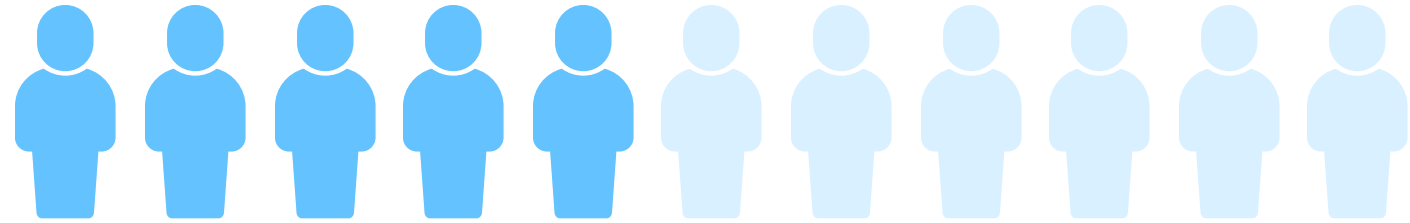


20%



Of owners order from veterinarians online today

45%



Would order from the vet if their vet offered the service or they were aware that their vet does already offer the service

Chewy

- **Online pet retailer carrying over 1000 brands of pet supplies**
- **Focused on autoship and home delivery and offer 5-10% savings on recurring orders**
- **Known for it's 24/7/365 customer support**



Every customer receives a handwritten “Welcome to the [Chewy] family” postcard. If customers email a photo of their pet (cat, dog, horse, fish), we have an artist create an oil painting of their pet.

We want customers to be so wowed by the interaction they can't help but share their experiences

I had a customer who used to go to the Florida Keys every weekend with his army buddies and they'd go to Kermit's Key Lime Pies.

He called us, and he had just mentioned that he hadn't had it in 40 years, so we overnighted one to him! I've never heard somebody cry so hard, laugh so hard and be so happy all at the same time.

While most retailers see customer service as a cost center, Chewy relies on customer service as the key to its soaring customer happiness metrics

PillPack

Empathy Training

Employees were given a timed test: They had to pack dozens of pills into a box, known as a pillminder, while parsing through complicated and sometimes vague instructions in tiny script, like “take one tablet Monday, Wednesday and Friday night, take two tablets Tuesday and Saturday. Skip Sunday.”

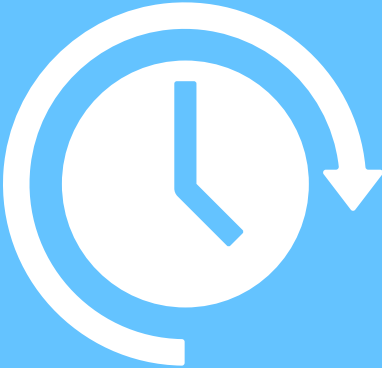
To add a further challenge, they wore oversized gloves to restrict their mobility and thick prescription glasses to duplicate poor eyesight.



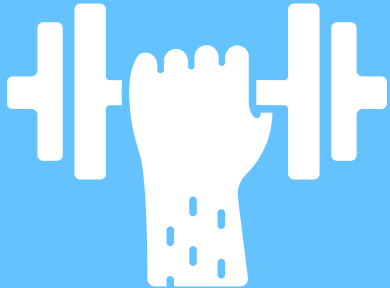
Vet clinics cannot deliver a better experience themselves



Too Expensive



Too Much Time

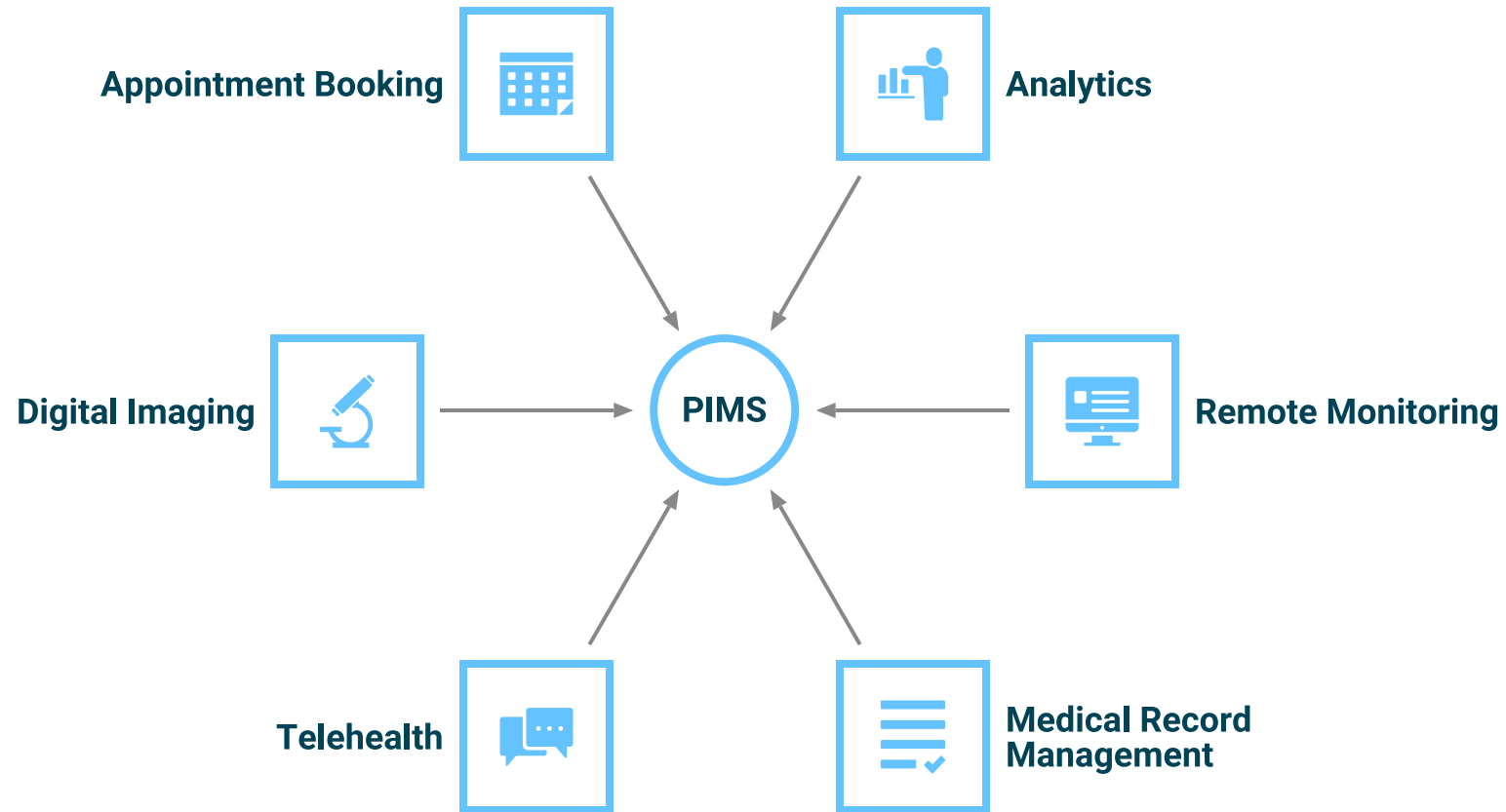


Too Much Work

**“There are over 100+
applications now connected
to Cornerstone”**

Jon Ayers, Fmr CEO, IDEXX

Ecosystem of Connected Solutions



Integrations

- **Read - Batch**

Eg. Analytics

- **Read - Real-Time**

Eg. Reminders

- **Read/Write**

Eg. Calendars

- **IDEXX & Covetrus both have utilities that allow for integration at scale**

Already in 10K+ practices

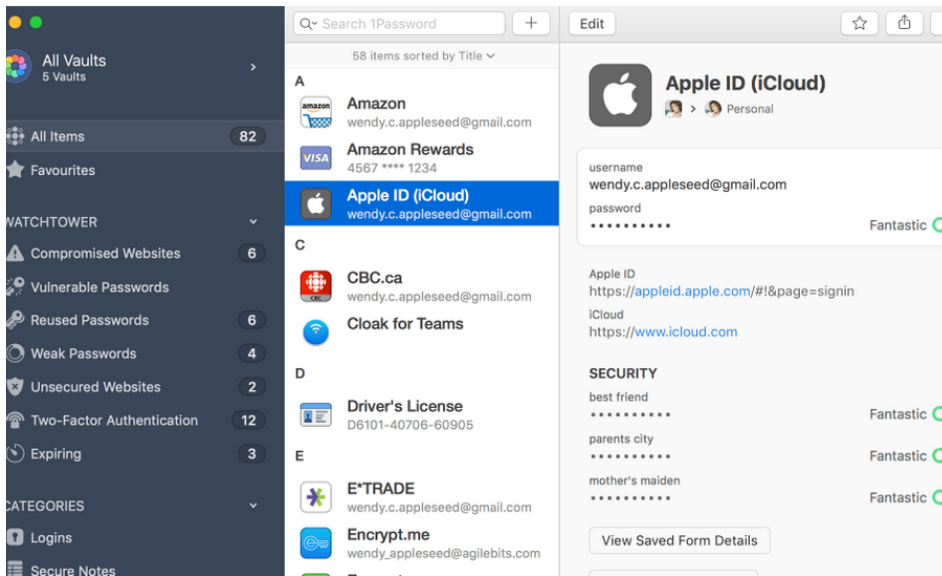
- **= Explosion of 3rd Parties able to build solutions**

Data Collection

- 1 Be clear what you are asking for and why you need the information
- 2 Make it easy for people to unsubscribe & respect when they do
- 3 Audit your existing communications
- 4 Measure the success of the campaigns that you run
- 5 Practice list hygiene



1Password



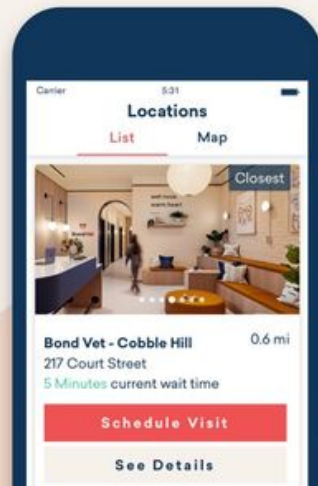
- Allows you to securely store and easily access logins for yourself and your team
- One-touch access on websites
- Automatically generates strong passwords and saves them for your convenience
- **Use Cases:** any practice login information, 3rd party login information, personal information (etc.)

What becomes possible..



Fully Integrated Clinic Models

- Own and operating new hospital builds
- Developing their own technologies to support the client experience
- eg. Modern Animal, Bond Vet, Small Door Veterinary, Heart + Paw



Video

Introducing GoFetch Health

- **Unlimited 24/7 Vet Support**

Live chat & phone with veterinarians & vet nurses

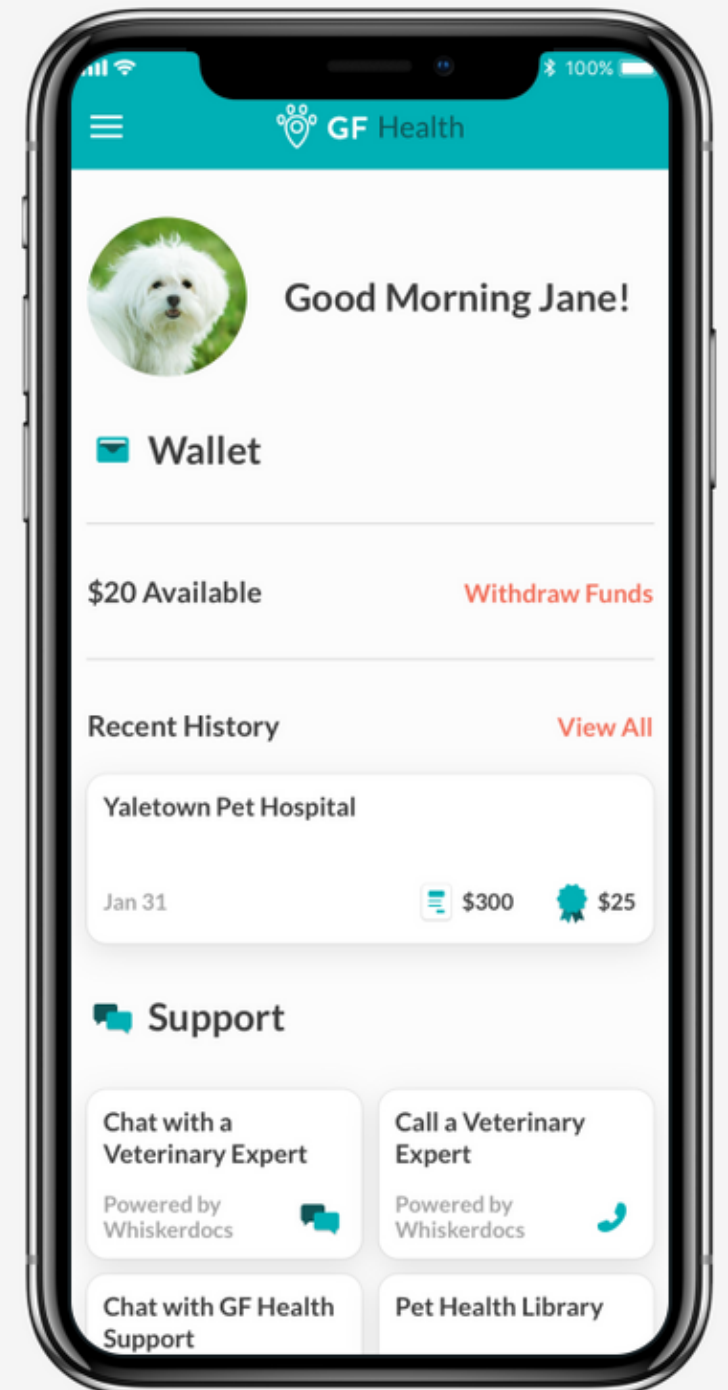
- **Earn 5%+ cash-back on vet expenses**

Plus additional bonuses for being compliant on care

- **Access to personalized offers & promotions**

- **\$5/month (\$50/year) membership covers all your pets**

No age or breed restrictions & use with insurance



How It Works

Practices don't administer, manage or track anything

1 Members earn rewards every visit

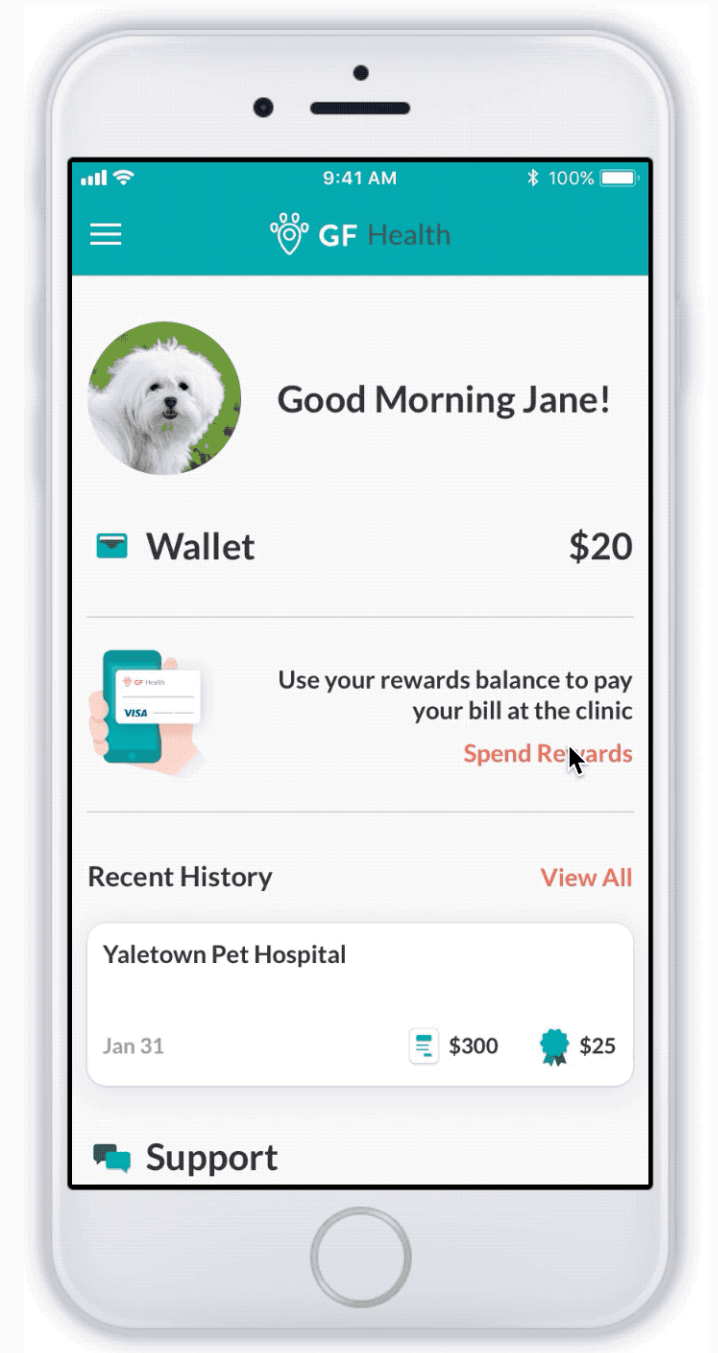
Automatically tracked and deposited into account within 24-48hrs

2 At their next visit, members can spend any earned rewards

From us, partners, and/or the clinic

3 Members pay for care using our virtual VISA

Clinic gets paid instantly using existing hardware and workflows



Summary

- Practices are going to **have more solutions available than ever before**
- **Instead of a fragmented set of capabilities, those clinics that can deliver a unified experience will be better**
- **Technology needs to make our lives easier, not create more work**
- **Practices will need to leverage their relationship with clients, data, and hospital infrastructure to maximize benefit**



Collaborating on Cases

When you need help
where do you go?

Most medical decisions are made in isolation

Time, Cost, Geographic Constraints

Specialty Care

Digitization of Diagnostics

New Forms of Collaboration

**Driving Outcomes at Primary
Care Clinic**

Radiology

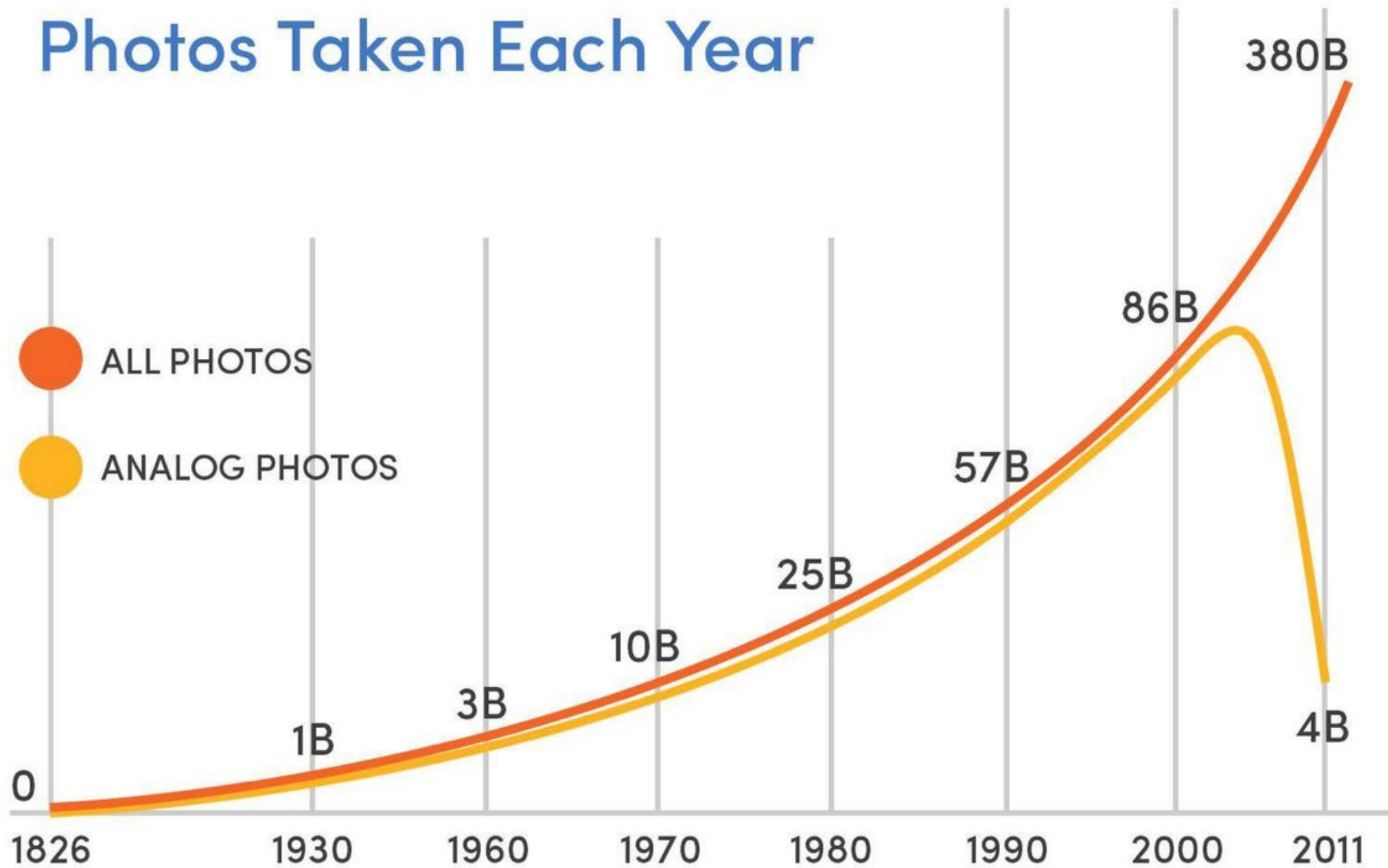
- **Analog Process**

- Infrequent Use
- Expensive
- Little opportunities for collaboration
- Lengthy turn-around time
- Limited to special facilities

- **Digital Process**

- Commonly used
- Little additional cost per image
- Specialty interpretation baked into the model
- Quick turnaround times

Photos Taken Each Year



Now there are over 1.2 trillion photos taken each year

Vetology.AI

- Founded by veterinary radiologist
- # of veterinary radiologists will increase by 30-35% in next 5 yrs
- # of reads submitted will increase by 400-500% in next 5 yrs
- Use machine vision to make radiologist more efficient and provide first-line of support to general practice

Vetology AI Rapid Cardiopulmonary Screening

Ask A.I.M.E.	CASE AI EVALUATION REPORT:			
	Case		Patient	
Vetology Innovations San Diego, CA. ai.vetology.net (888) 416-2124	ID	1417817	Name:	Troge Dooley
	DOS	06/01/2019	Current Age:	14 years 9 months
	Priority	Normal	Age when report:	14 years 9 months
	Clinic		Sex:	M
	Center Veterinary Clinic		Species:	Canine
	8977 Mira Mesa Blvd		Breed:	Dachshund Mix
	San Diego, CA 92126		Weight:	0.00 lb

Artificial Intelligence (AI) Evaluation

CANINE AI Cardiopulmonary Screening: Abnormal

Airway/Pulmonary Findings:

1) A mild bronchial pattern has been detected. Common DDx: acceptable for older age (if non-clinical), mild bronchitis (bacterial, allergic or parasitic, including heartworm disease), recurrent microaspiration (brachycephalic dogs or laryngeal paralysis). Less Common DDx: false positive result from technique or edge-enhanced image processing, eosinophilic bronchopneumonopathy, inhaled chemical irritant.

Cardiac Findings:

1) The cardiac silhouette size is normal.

DISCLAIMER: This report is for **DOGS ONLY**. These results should not be applied to another species. This is a computer assessment without human input. This assessment should be used as one piece of information in your diagnostic evaluation. This is **NOT** a radiographic diagnosis.

Seth Wallack, DVM, DACVR
Vetology Founder. Creator of Radiology AI Algorithms

Next Steps

NOTE: If the result is inconsistent with the clinical picture or if you would like another opinion, this study can be submitted to Vetology for further evaluation.

[CLICK HERE to submit your question directly to a Vetologist](#)

See below for additional image links.

[CLICK HERE for the Vetology Image Viewer](#)

Further evaluation/treatment of the lungs and/or airways may include:

1. Deeper AI Evaluation of the lungs using Ask A.I.M.E. [Go to Image Viewer](#)
2. Radiograph submission to a Vetologist for further evaluation.
3. Empirical therapy for lung disease based on your clinical assessment.
4. Bronchoscopy with bronchoalveolar lavage (BAL) vs. endotracheal lavage and/or Baermann fecal.

Video

Use Cases

Anesthesia

Collaboration with specialists to provide remote oversight to patients

Oncology

One Health Company is using genomic sequencing to deliver targeted therapies to patients that are provided through primary care clinic

Pathology

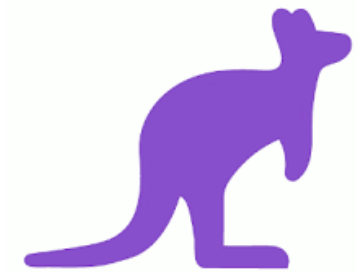
Lacuna, IDEXX and others allowing for machine supported readings of slides and samples

Imaging

Use of specialists and machine vision technologies to support radiograph and ultrasound interpretation

Empowering Individual Practitioners

New Locum Models



Locum/Relief Networks

Old Way

Referral Networks

Manual Search

Limited Opportunities & Geography

Poor Discovery Options

No tracking

Limited Support

New Way

Online Communities

Resources to help individual vets succeed

Credential and skill matching

Larger and more diverse pool of opportunities

Ongoing personal and professional

development

On-Demand Veterinary Care

- **Operate in-home services enabled through software**
- **Focus on providing high-touch customer support, expanding share of wallet, and optimizing for for supply**
- **Members have 1x interaction/month**



“Uber” for Vet care



LA



SF/NYC



NYC



UK



Acquired



An experience built for the modern pet parents?

	Traditional Clinics	Their Approach
Appointment Booking	Give us a call	Book directly online
Pricing	We can't give that information out	Posted directly online
Medical Records	Difficulty sharing with owners, charge etc.	Freely available to owners
Access to Doctors	Available 9-5, Email, Phone	Telehealth chat is included in every membership (Average usage is 1x/month/member)
Medication & Nutrition Refills	Pick-up in person, extra-charges associated with writing a prescription for external use	Preventative included in membership (additional products available through app and home delivered)
Doctor Selection	Can be difficult to select the same doctor for each appointment	Rich doctor profiles and pictures and the ability to select your individual veterinarian

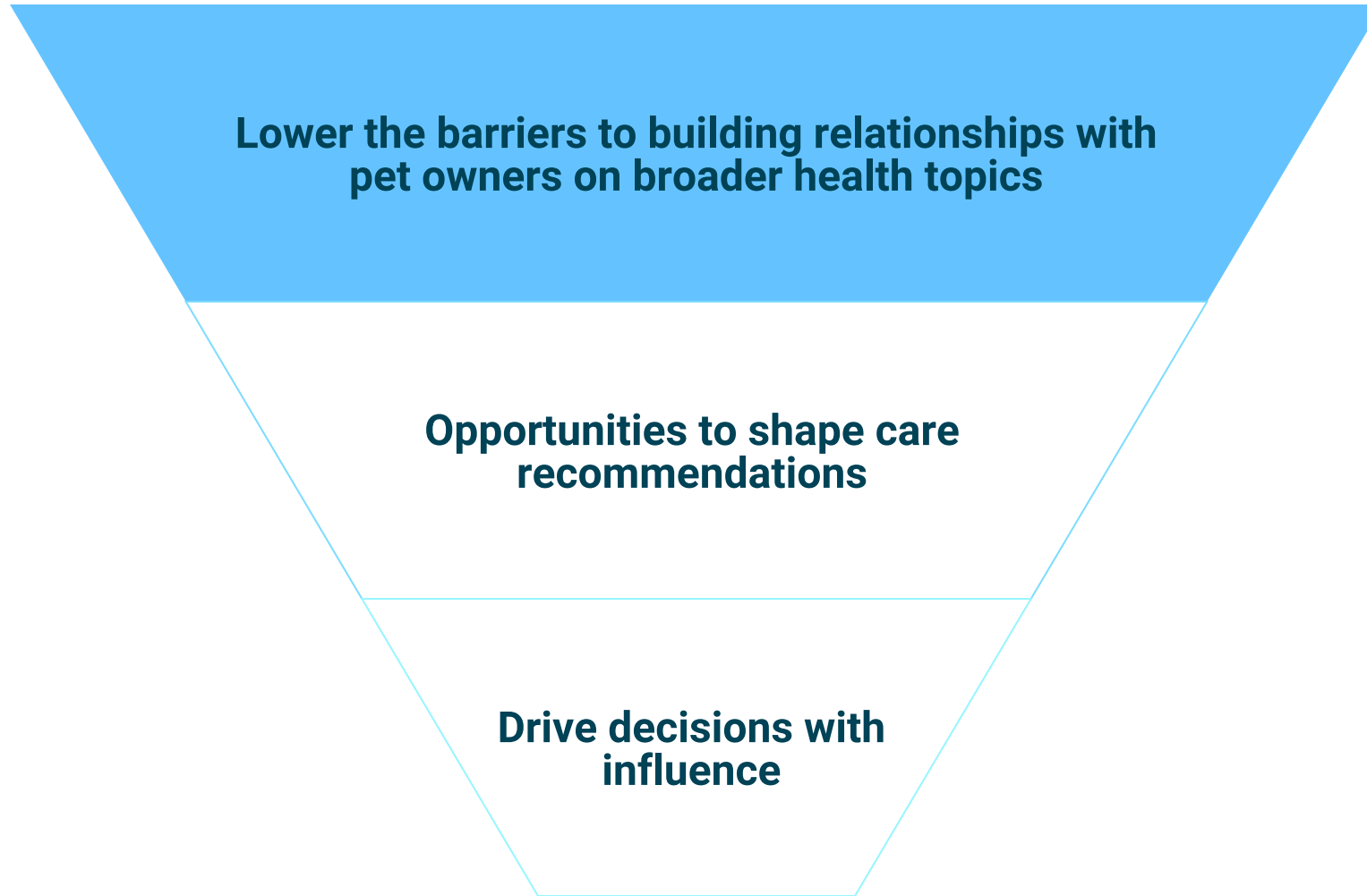
“Click to Brick” in Veterinary Medicine

Low-Tech Strategies to Create Experiences for Your Clients

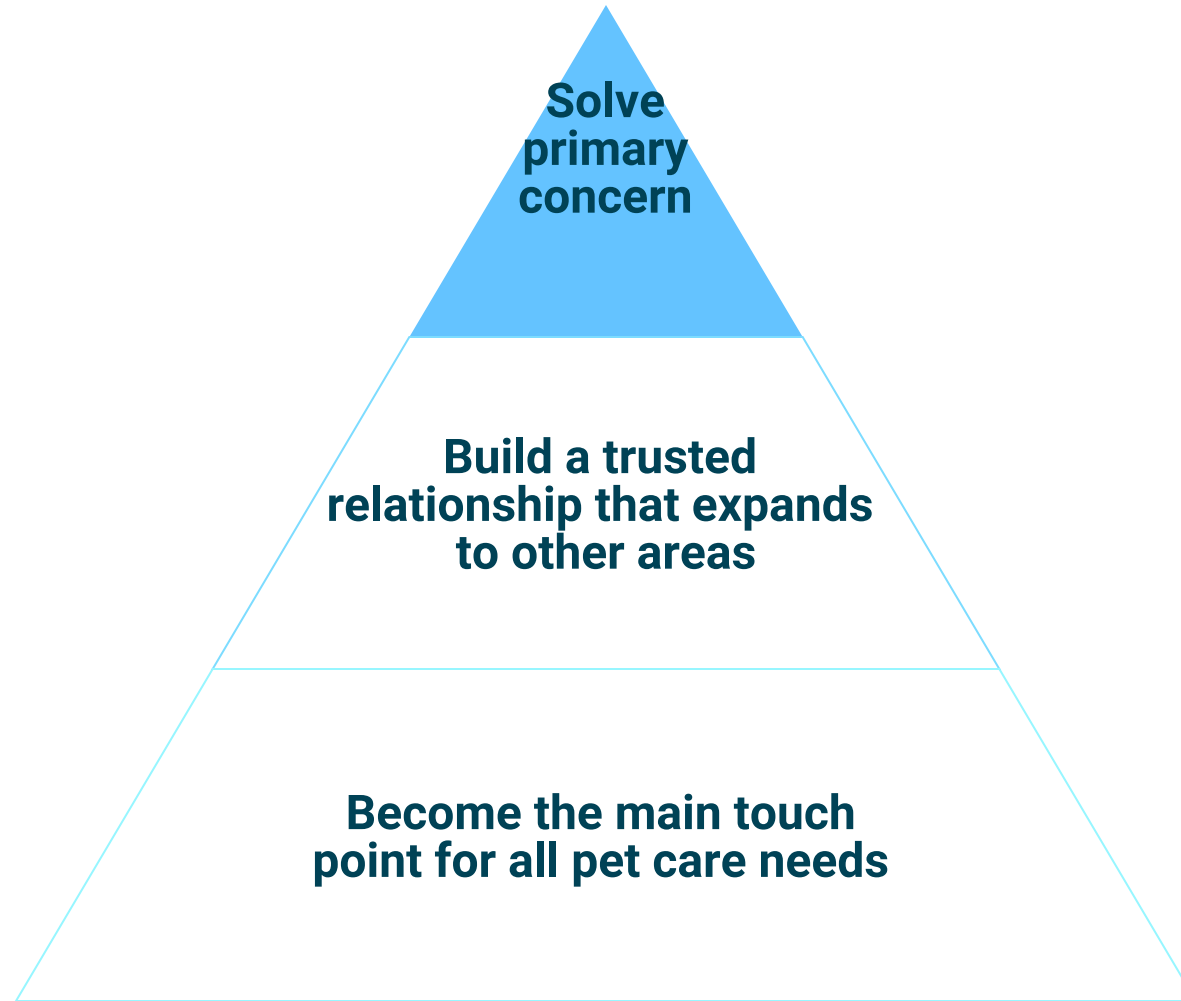
- Dedicated pick-up location for online orders
- Weight check turned into photo booth like experience
- Simple signage at front desk to inform clients when an euthanasia is taking place
- Coffee giftcards for when your staff are running behind
- Build focus for your team through colour coding
- Easy access to all necessities (eg. poop bags, water, leashes)
- Parking lot help



Developing a Different Relationship



Developing a Different Relationship



Summary

- **These trends are converging and shifting the profession in ways that are yet to be fully understood**
- **Our models of care were built for a very different world**
- **There is enormous opportunity for the profession to grow in both size and significance in response to evolving attitudes about pet health**
- **This will require us to think differently about the role of the practitioner and the practice**



Questions?

Adam Little, DVM

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