

Unpacking Telehealth: The Why, What, and How of Virtual Care

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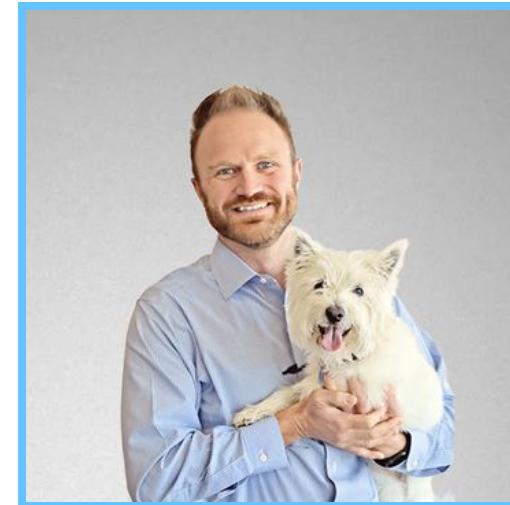


Telehealth Sessions



This Session

Telehealth Models
Understanding the Rules
Early Lessons Learned



Afternoon with Dr. Aaron Smiley

In the Trenches Experience
Use Cases
Case Studies from 1000+ Consults

Breaking Down Telehealth

- **Unpacking Modern Client Relationships**
- **Why Now?**
- **What Models of Telehealth Exist?**
- **How Can You Monetize It**
- **Lessons Learned**

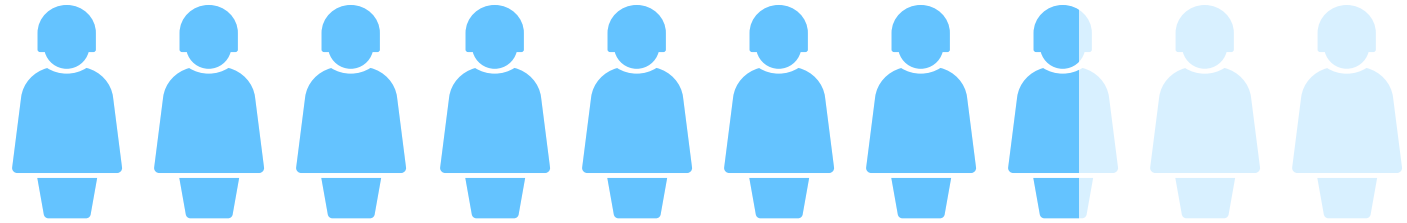
**On a scale from 1-7, how
strong is your relationship
with your clients?**

Audience Poll

**What makes your relationship
with your client's strong?**

Importance of Seeing the Same Veterinarian

75%



Very or Somewhat Important

What if your relationship with your client's wasn't as deep or resilient as you thought?

**How many of you have
messaging a friend or
family member about
their pet recently?**

In the last month?

In the last week?

Today?!?

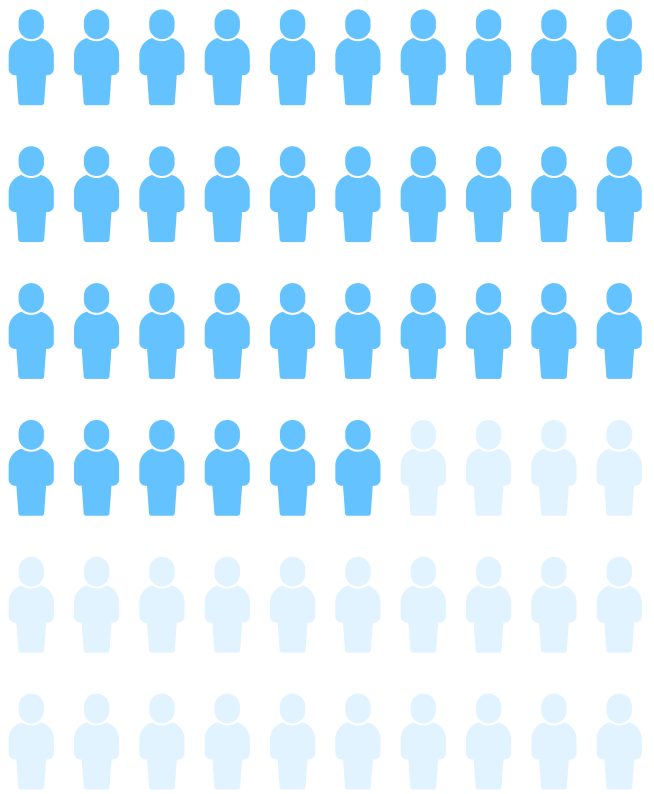
**We are all a veterinarian
to someone else**

A vicious unsustainable cycle



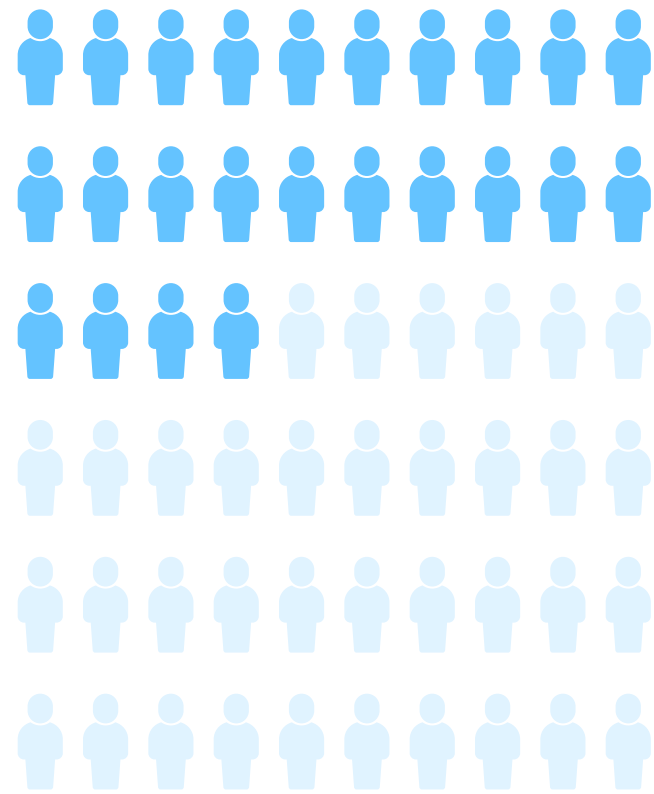
What % of owners research care before vet visit?

60%



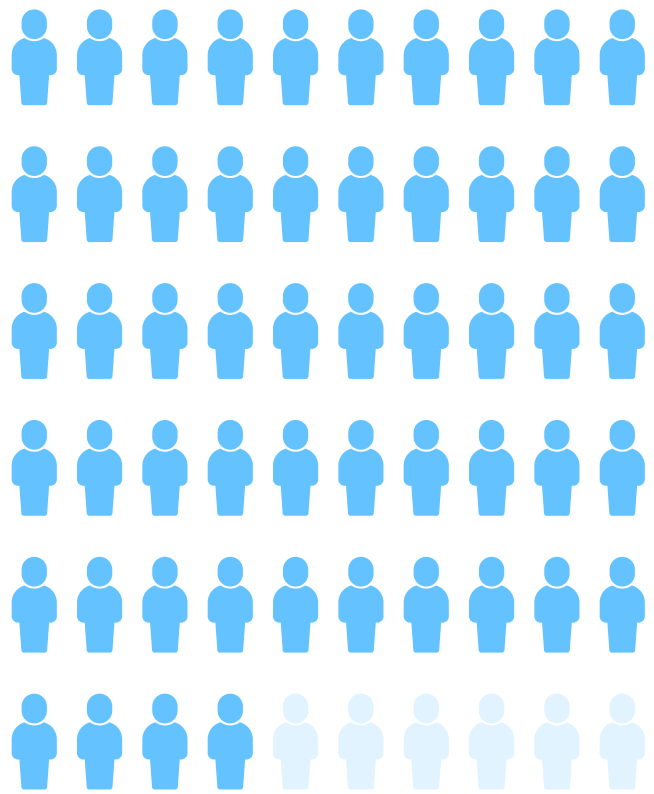
Average Owners

40%



“Old School” Owners

90%



“New School” Owners

Source: Merck, Pet Owner Pathways

0.009%

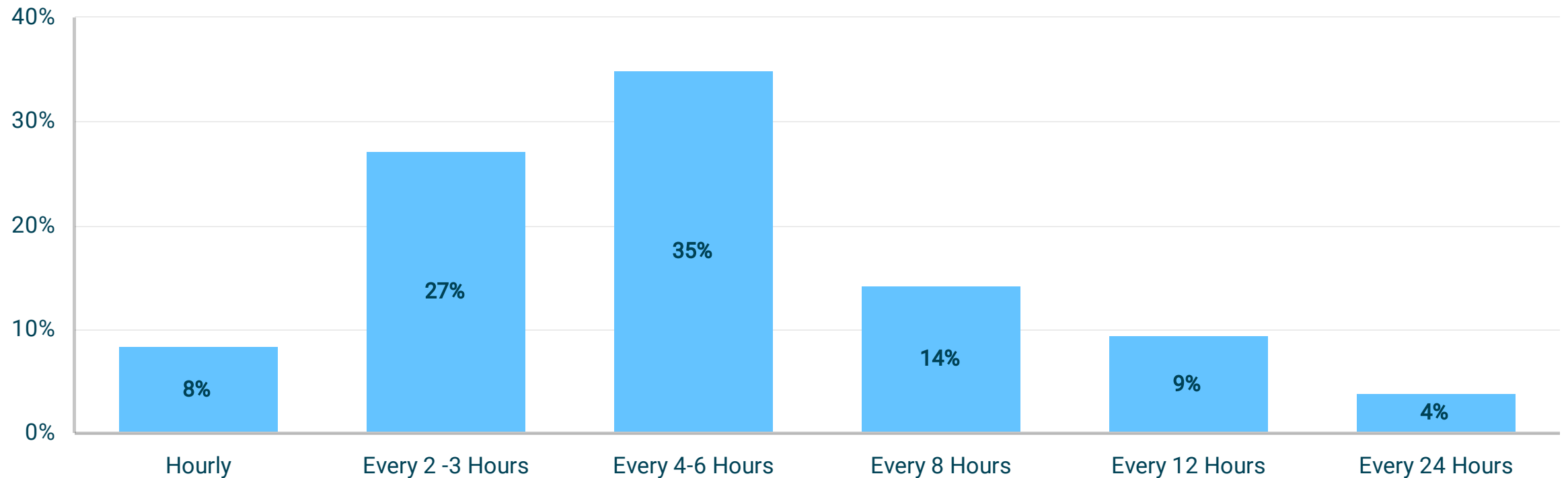
Amount of time pet owners spend at the veterinary clinic per year



**How often do you think people
want to be contacted when
their pet is in the hospital?**

Owners were then asked their preference regarding frequency and modality of updates if they had a pet that required a hospital stay of at least 24hr at some point in the future

Medical Updates and Appointment Confirmations: Pet Owners' Perceptions of Current Practices and Preferences



It's not just about the # of touch points, but the quality of those interactions

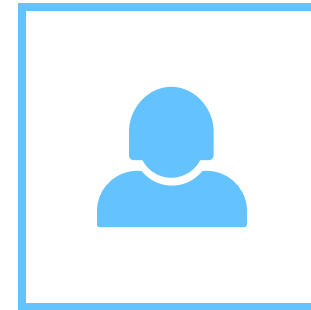
Are we speaking the same language?

Different perspectives on what preventative care is



Veterinarian

- Vaccines
- Parasite Preventative
- Spay/Neuter



Pet Owner

- Diet
- Exercise
- Care
- Play

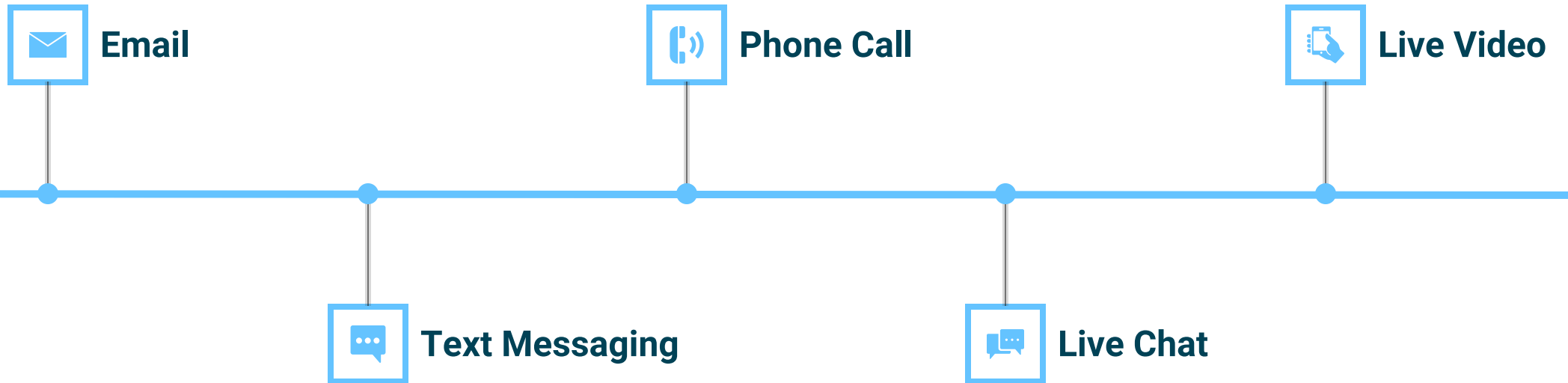


Veterinary “Broken Telephone”



Spectrum of Telehealth

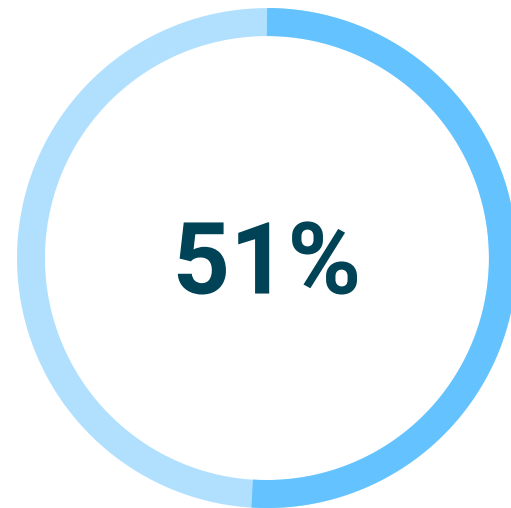
Veterinary Innovation Council



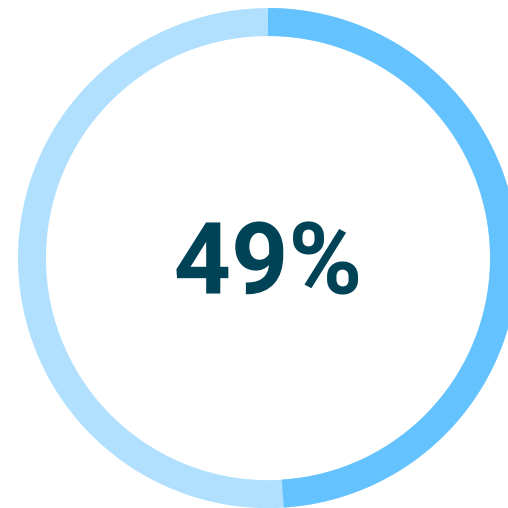
How many of you are providing support through one of these channels?

You are already doing this

Do you offer diagnosis and or treatment recommendations to clients after collecting historical or clinical data via digital communications

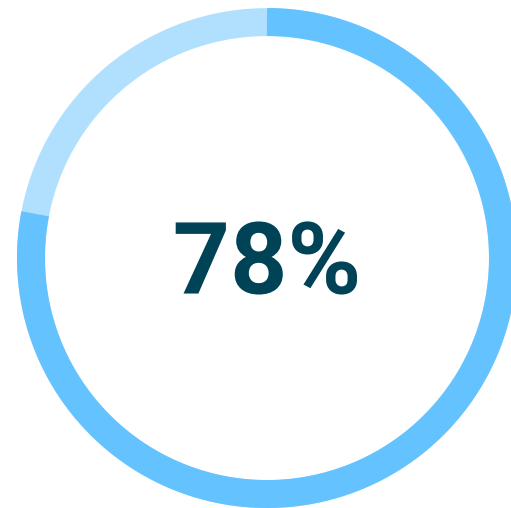


No

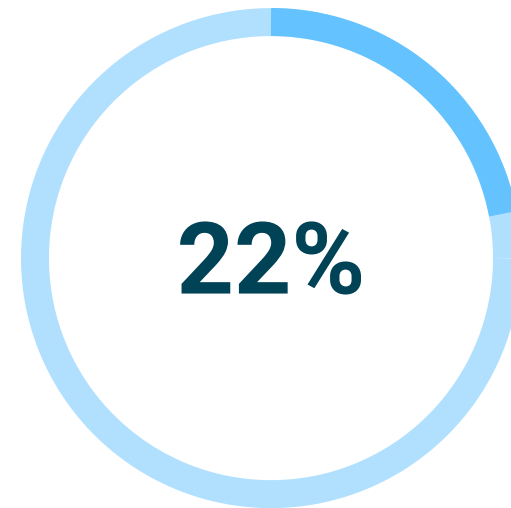


Yes

For which type of problems do you offer these consultations?

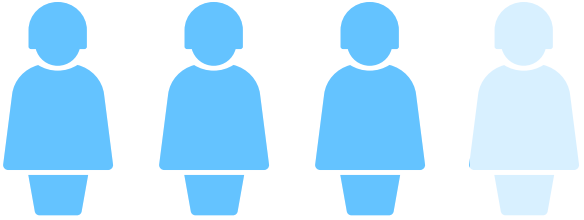


**Rechecks or
reassessment of
previously diagnosed
issue**



**Diagnosis or
management of a new
problem**

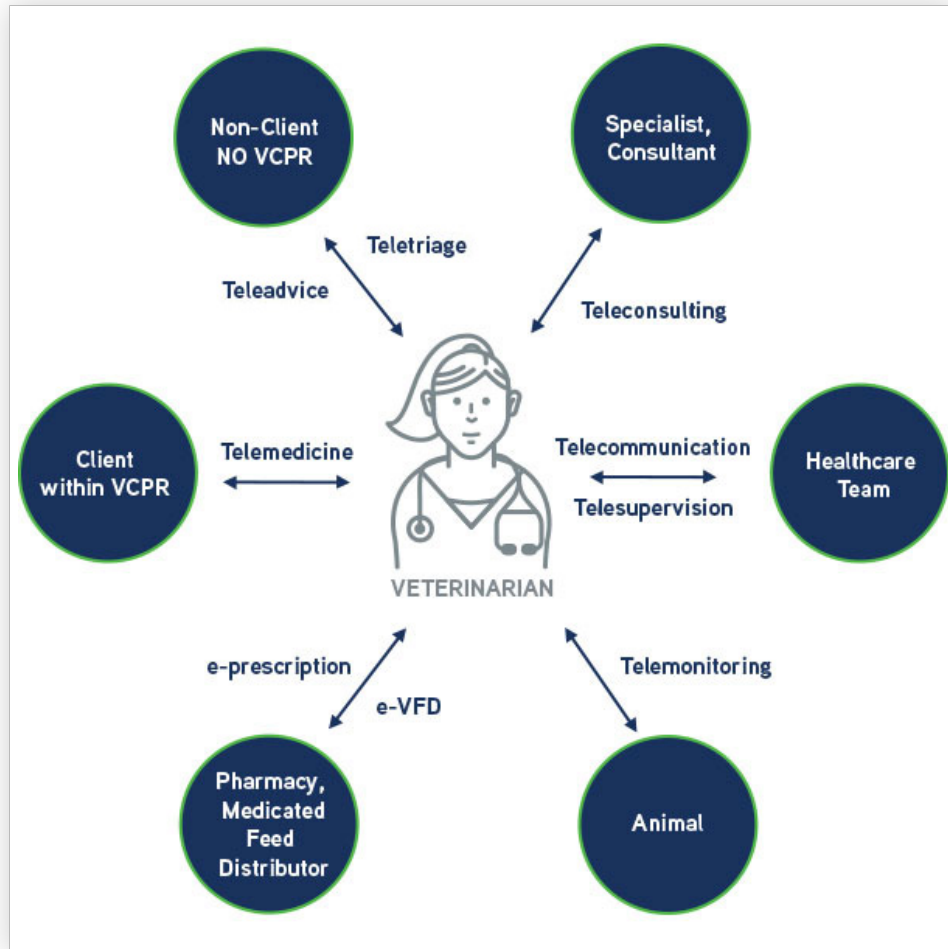
**In what
situations do
you charge for
these
consultations?**

75% 

I don't charge for such consultations

Telehealth Models & Rules

AVMA Telehealth Model



There are several models currently available

Outside the VCPR - Triage & Advice

Within the VCPR - Telemedicine (+/- prescriptions)

The VCPR varies State to State

It's messy

Unpacking the Veterinary-Client-Patient-Relationship

- **Each state is different**

- **Person vs Practice**

The VCPR is with you, not the practice

- **Time Constraints**

How long since past visit?

- **Condition Constraints**

VCPR for all situations?

- **Physical vs Virtual**



Telehealth Providers



Most states and the Principles of Veterinary Medical Ethics of the American Veterinary Medical Association (AVMA) require a VCPR for a veterinarian to diagnose, prescribe medication for, or otherwise treat an animal

American Association of Veterinary State Boards

A recent examination of the animal or group of animals, either physically or by the use of instrumentation and diagnostic equipment through which images and medical records may be transmitted electronically

**We make decisions
in the absence of
information every day**

Ohio Position Statement

January 2019

The veterinarian is readily available for follow-up evaluation, or had arranged for emergency coverage, in the event the patient suffers adverse reactions to the treatment regimen or the treatment regimen fails.



Ohio Position Statement

January 2019

The veterinarian has sufficient knowledge of the patient to initiate at least a general or preliminary diagnosis of the medical condition of the patient. In order to demonstrate that the veterinarian has sufficient knowledge, the veterinarian shall have seen the patient recently and also shall be acquainted personally with the keeping and care of the patient either by examining the patient or by making medically appropriate timely visits to the premises where the patient is kept.



Ohio Position Statement

January 2019

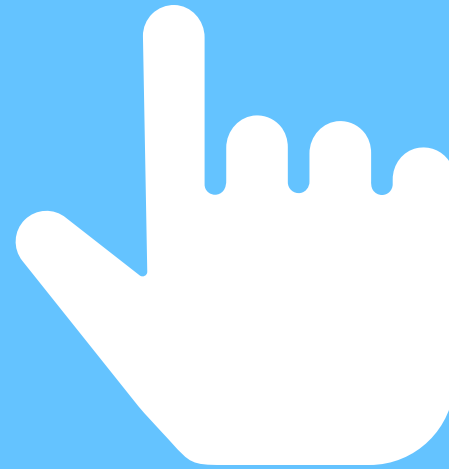
A veterinarian assumes responsibility for making clinical judgment regarding the health of a patient and the need for medical treatment, medical services or both for the patient, and the client has agreed to follow the veterinarians' instructions regarding the patient.



Models of Telehealth



Software as a Service



Virtual On-Demand

Software as a Service

Overview



TeleVet



airVet
24/7 PET CARE, FROM ANYWHERE!

**Clinics
license
software
for a fee**

**Clinics set
scope of
services,
hours of
availability
& fees**

**Variety of
features**

Notes,
scheduling,
appointment
refills, video
recordings

**Can be
used by
teams or
individuals**

Software as a Service

Advantages & Disadvantages



TeleVet



airVet
24/7 PET CARE, FROM ANYWHERE!

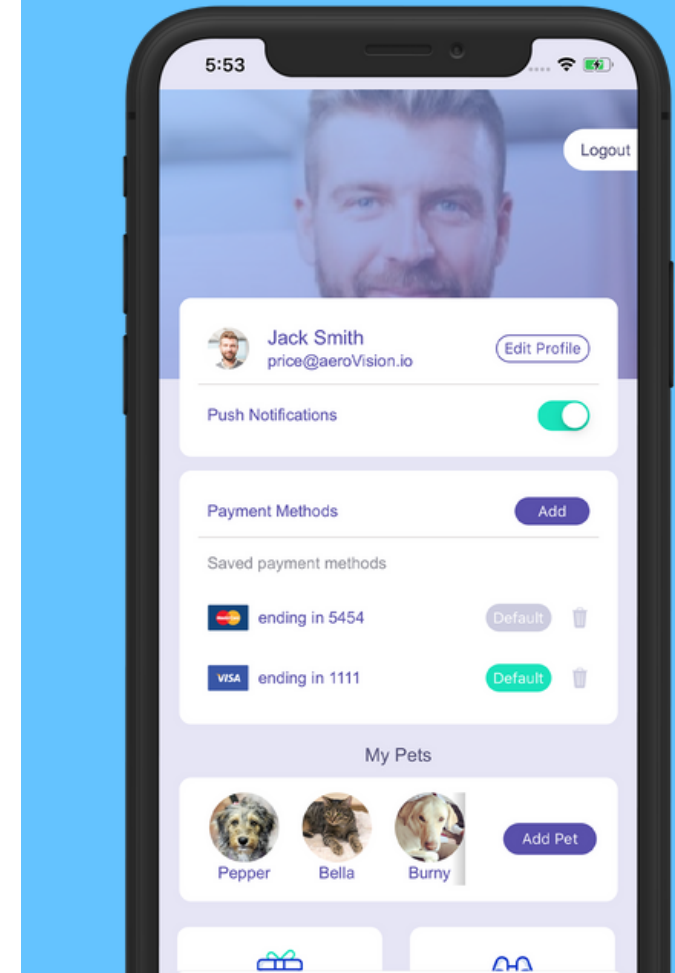
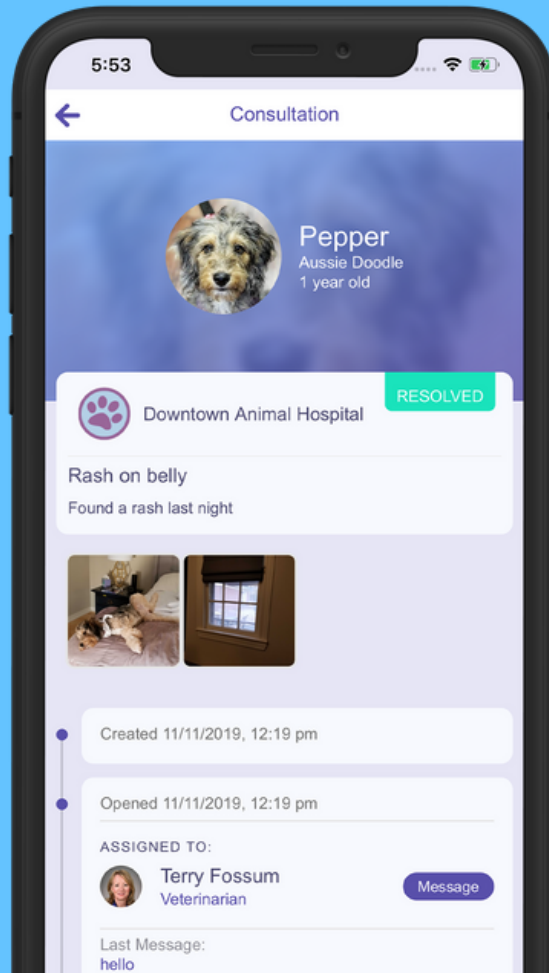
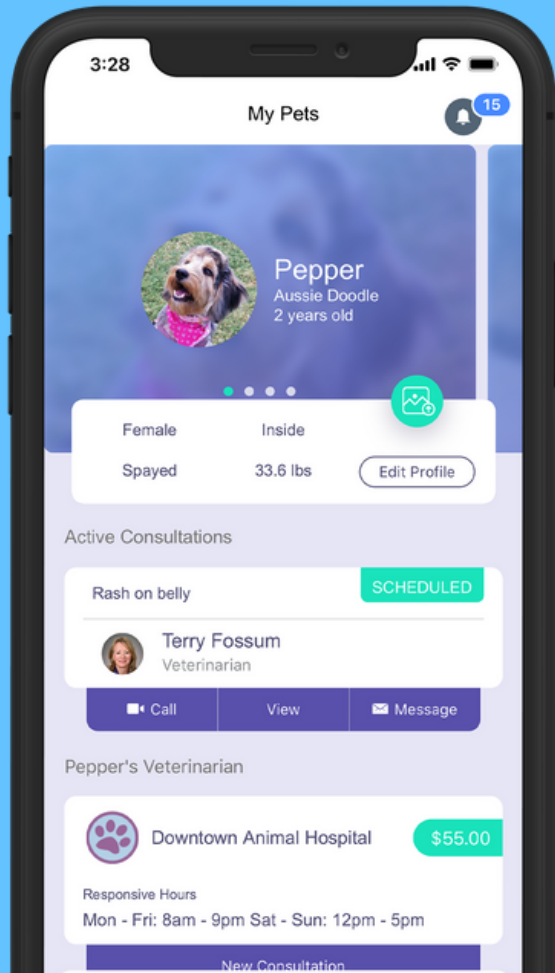
Flexibility

Easy for individuals to get going

Can be difficult to integrate within workflows

You are responsible for marketing & managing

Televet



Virtual On-Demand

Overview



**Augments existing team
or offered as direct to
consumer**

Contract veterinary staff

**Focused on triage &
general advance (outside
the VCPR)**

**Transcripts often sent
back to primary clinic**



Virtual On-Demand

Advantages & Disadvantages



Can help scale your staff

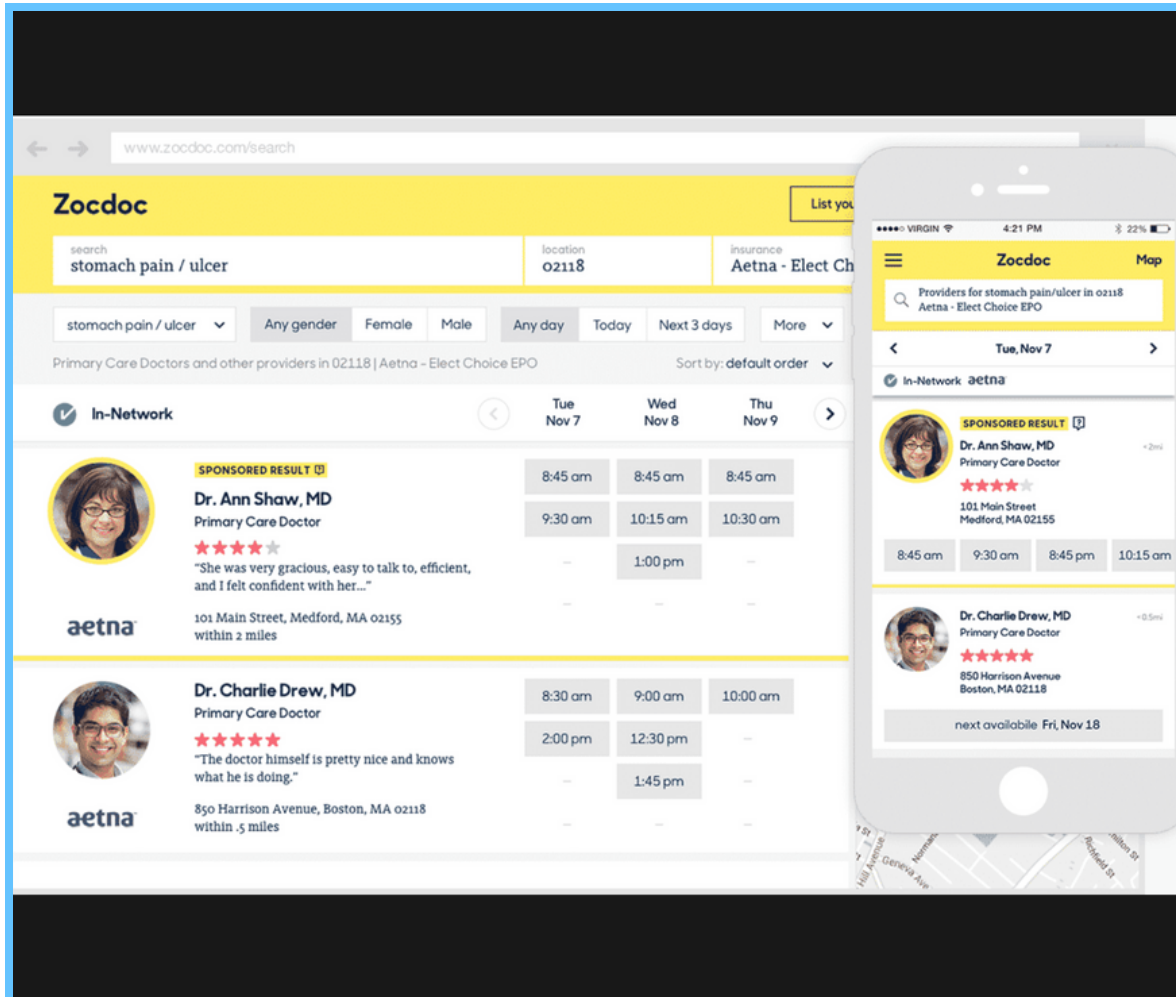
Provide support to your clients

Lead to appointments being generated

Can lead to broken experiences



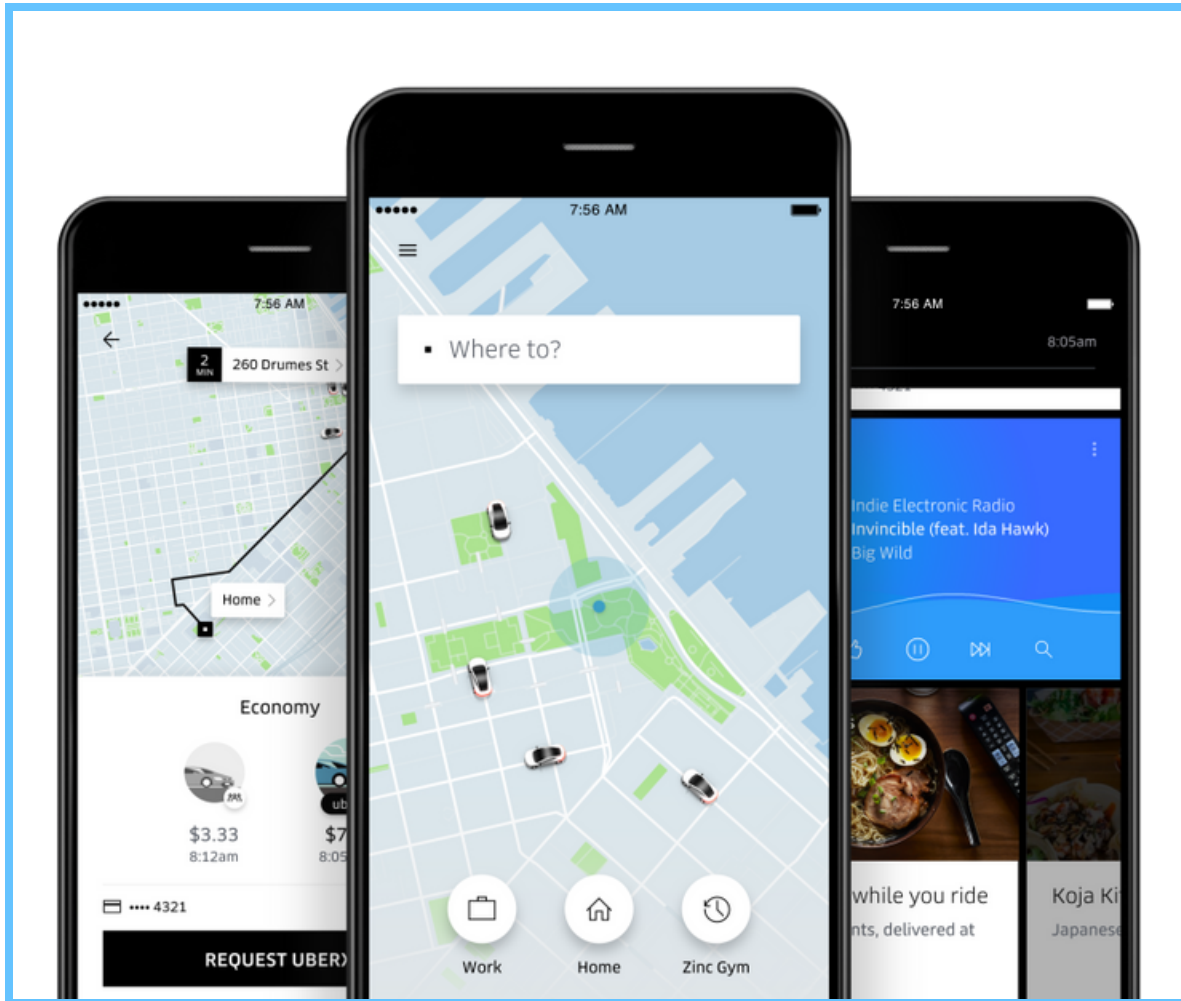
Enabling Trust



Zoc Doc

- The ability to get you the best doctor possible at the right time
- Network of providers each with profiles, ratings, reviews, etc
- Search by symptom, rating, geography, availability, coverage
- Focused on the individual
- Transparent ratings, availability, etc
- Valued at over \$1B and have millions of patients using platform

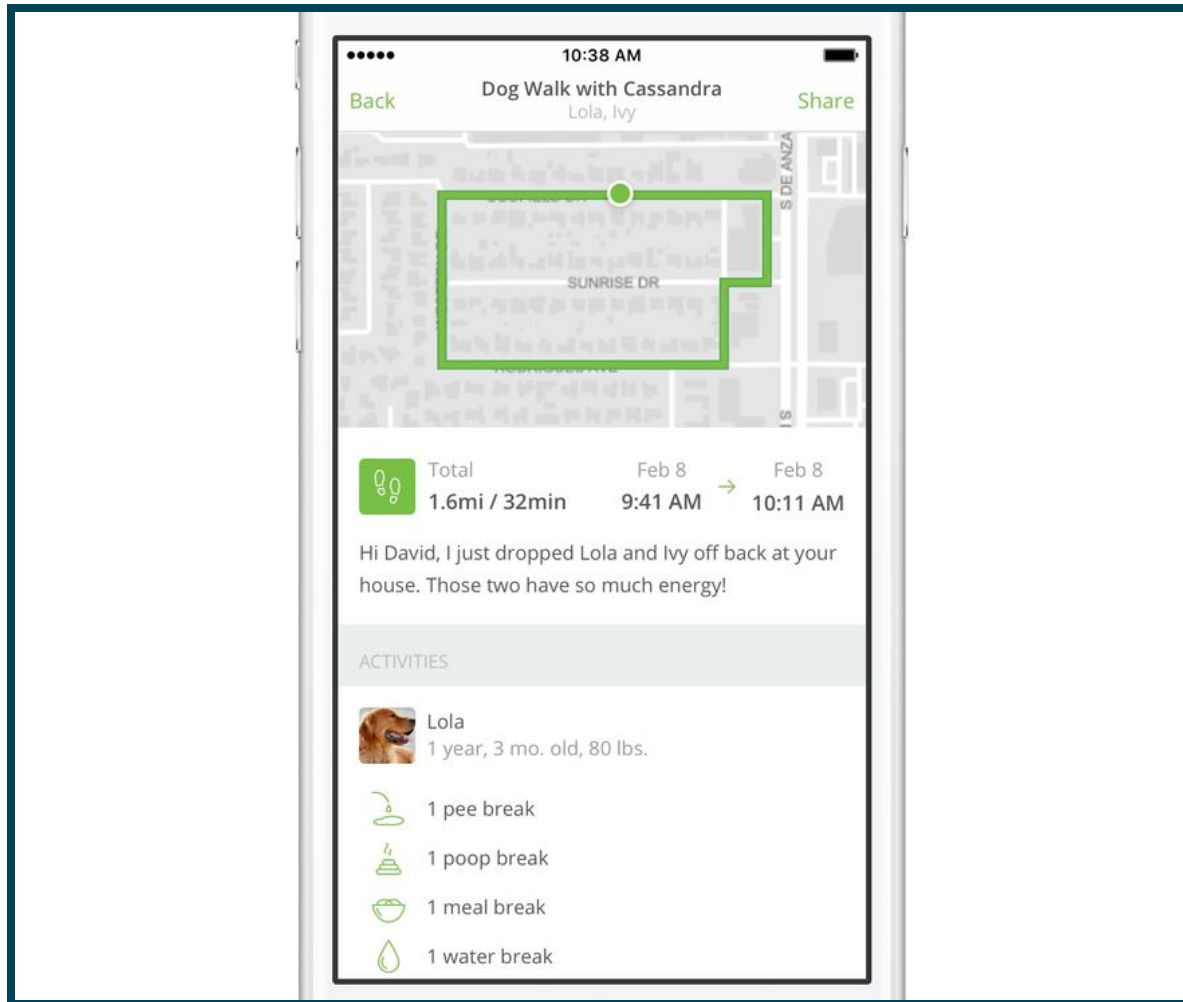
Enabling Trust



Uber

- Rider and driver profiles
- Badging systems based on past experiences
- Safety features and ride reviews
- 24/7 support
- GPS tracking
- Reporting on rides
- Intermediary support for lost and found

Enabling Trust

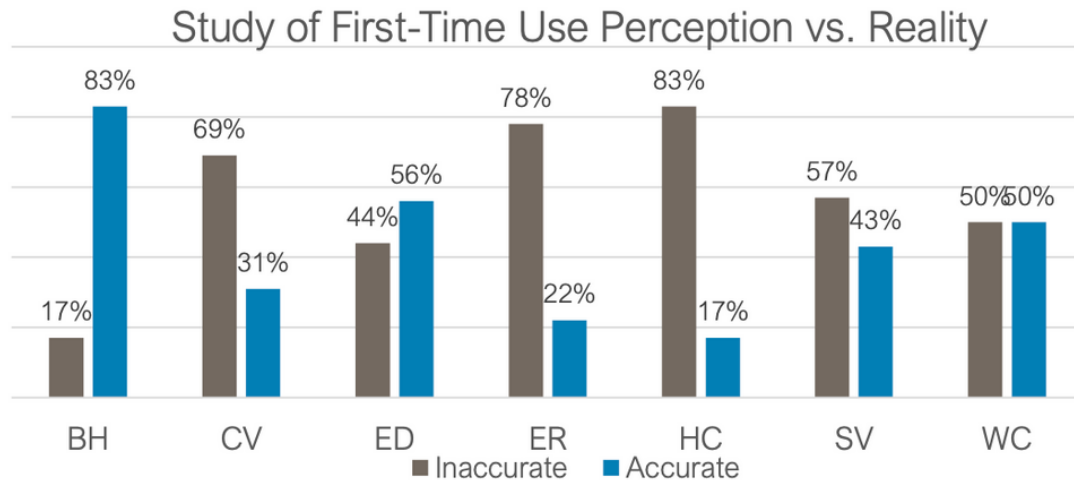


Rover

- Network of over 65,000+ dog sitting and boarding sitters in over 10,000 cities
- Daily access to people's homes, pets and wallets
- Transparent profiles, updates, and walking routes
- Raised over \$100M

WhiskerDocs

Primarily scaled through partners & serves 3.5M pet owners



- Measure initial pet owner issue and expected course of action
- Measure post-consult response and whether care recommendations whether lessened or elevated
- 80% of the time consumers think it's an emergency, emergency isn't required

A variety of business models are already being used to drive digital care services

- **Subscription Care**

Inclusion in wellness plans, etc

- **Employer Benefits**

WhiskerDocs serves >1M+ pet owners through employer relationships

- **Incorporated in Pet Insurance**

Most insurance lines include access to one or several lines

- **A la carte**

Per use pricing

- **Freemium**

Lessons From Early Adopters

Lessons Learned

- **Make the Invisible, Visible**
- **Leverage Your **Early Adopters****
- **How To Work With Vendors**

“I feel stuck. If clients are already getting free phone calls & emails, why would they start paying?”

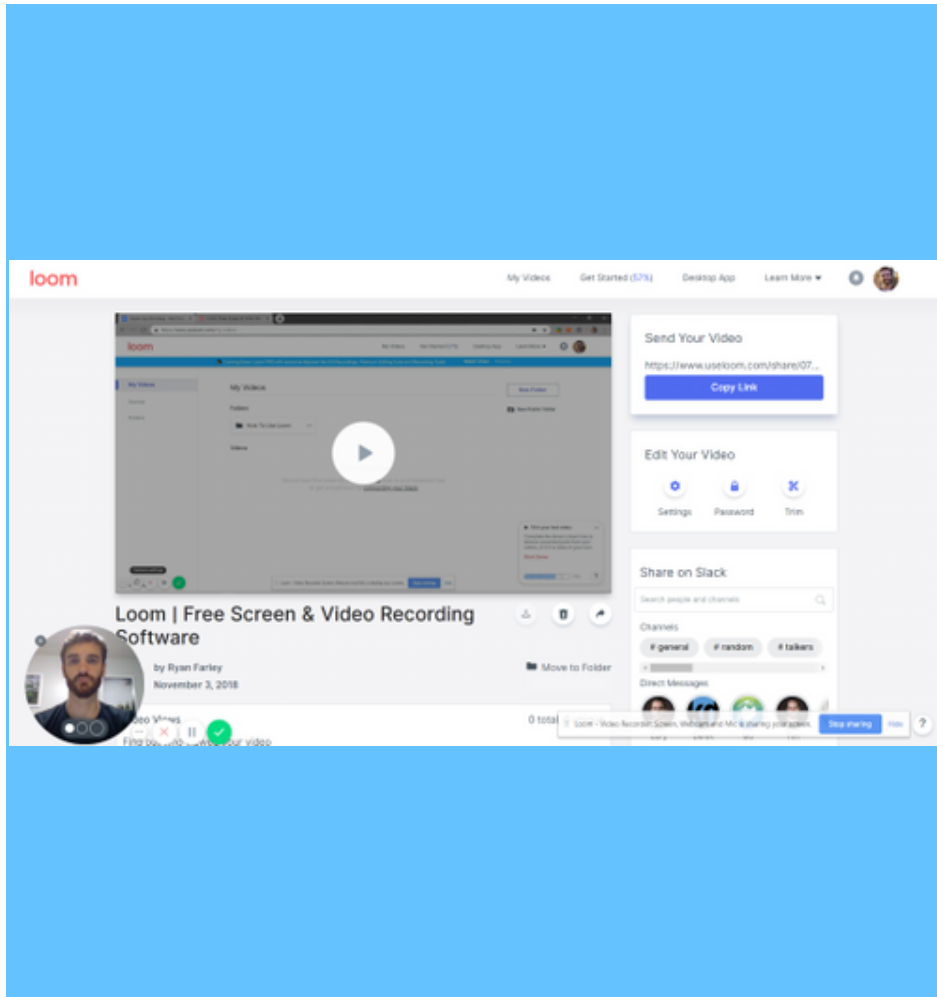
Comparison

	Phone Calls	Telehealth Consult
Immediacy	Wait on hold, less priority	Dedicated time with medical team
Who They Speak To?	Front Desk	Veterinarians & Veterinarian Nurses
Method of Communication	Audio-Only	Multi-Modal (Chat, Video, Photos,)
Follow-Up	N/A	Supporting Documentation, Etc

**As diagnostic tools
become digitized, it
creates new
opportunities to engage
and empower clients**



Loom



- **Free and easy to use software that allows you to capture your screen, annotate, and comment with video or voice**
- **Can run off your existing browser, share links to colleagues or clients**
- **Use Cases: Communicating blood work or other diagnostic findings, staff training, etc**

Finding Your Early Adopters

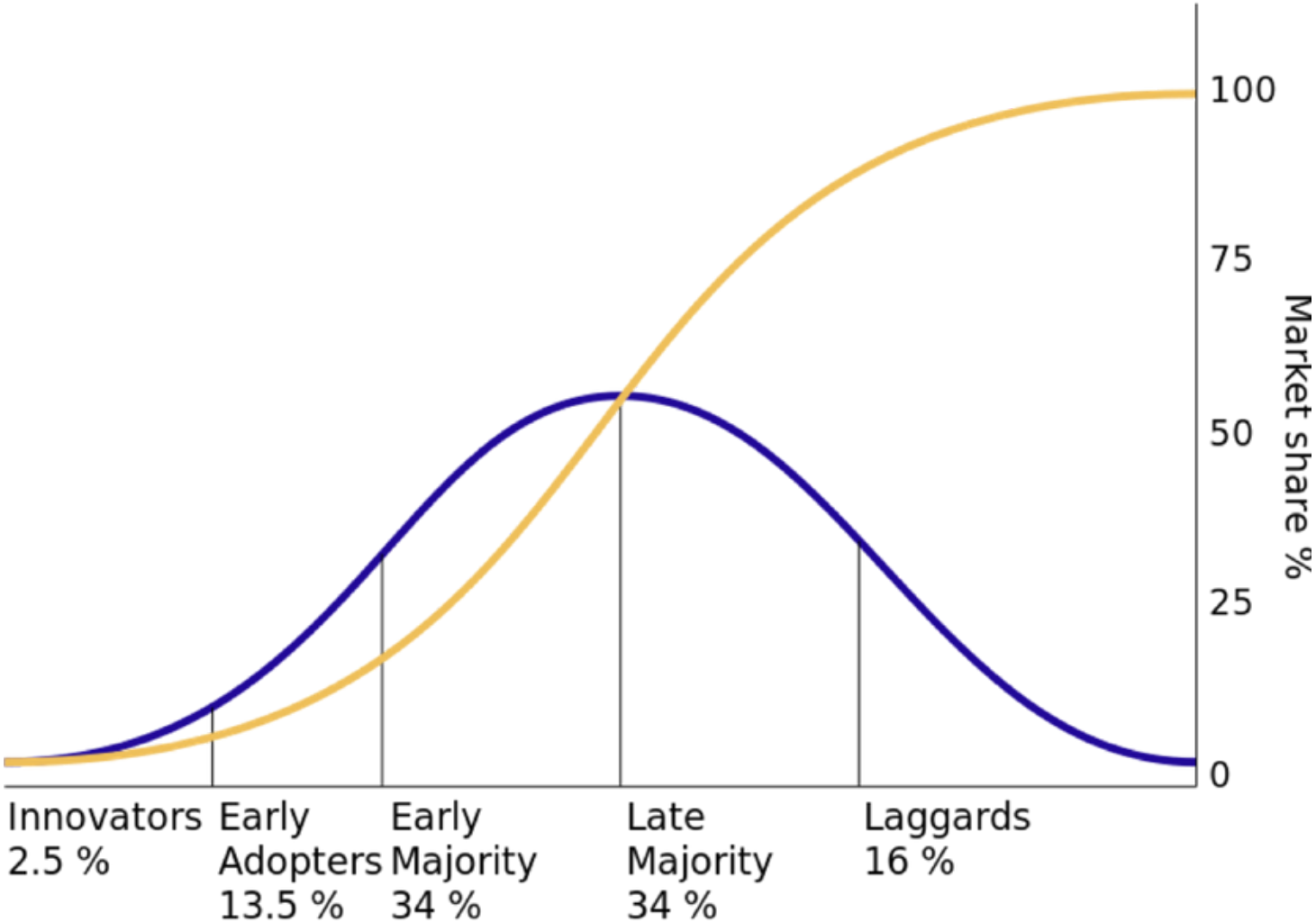
DON'T UNDERSTAND THIS STUFF
CAN'T BE DONE NOT NECESSARY
WE DON'T DO IT THAT WAY
ALREADY OVERWHELMED
WON'T WORK
LET'S TRY NEXT YEAR
OUR STAFF ISN'T TRAINED TO DO THAT
THAT'S STUPID
WE HAVE OLDER CLIENTS

TIME CONSUMING
TRY LATER

PEOPLE DON'T WANT THAT
TOO BUSY
EXPENSIVE
NOT AGAIN

WE TRIED THAT

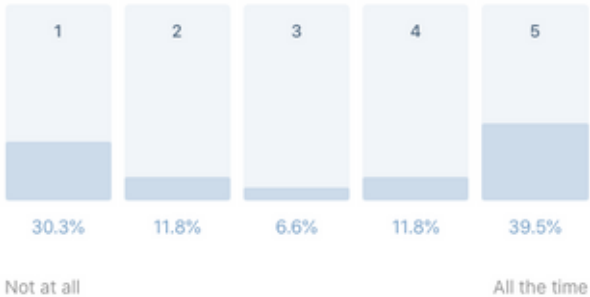
Not all customers are equal



It is hard to get things perfect for all clients

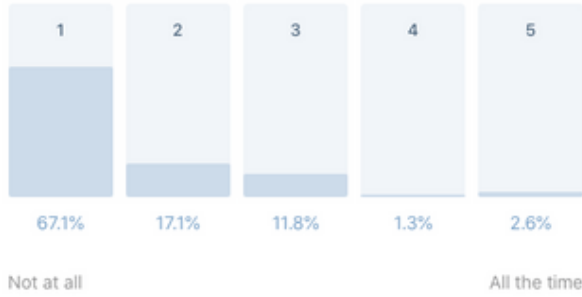
2i We use surveys to engage our clients after appointments and share this feedback with the team Avg. 3.2

76 out of 76 people answered this question



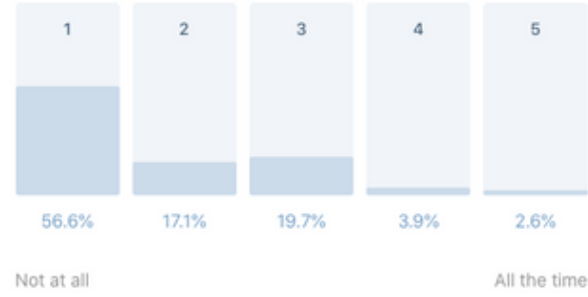
2j We use focus groups and/or customer interviews to engage our clients Avg. 1.6

76 out of 76 people answered this question



3f We normally test a new change with a small group of our clients before launching it to all our clients Avg. 1.8

76 out of 76 people answered this question





Characteristics of an Early Adopter

- They are excited about new things
- They like to be included in the process
- They care about your practice
- They are ok with imperfect
- They try lots of solutions



Ways to Engage Them

- **VIP or Members Program**
- **Waiting List for New Services**
- **Post-Appointment Surveys**
- **Events**
- **1 on 1 Interviews**

Working With External Partners

When evaluating a potential partner, what questions are most important to ask/answer?

What To Evaluate

The Four Ts



Team



Technology



Traction



Testimonials

Team



- **Who are the people that run the business?**
- **Who will you be working with at each stage of the partnership?**
- **What is their experience?**
- **What are their motivations?**
- **How long have they been working on this problem?**

Technology

- **Do they have a demo or just screenshots?**
- **Can you test the software before you implement it?**
- **Do they integrate with your practice management system?**

Do they do it? Will you be using another service?

- **How do they integrate?**

Read (Batch), Read (Real-Time), Read/Write

- **How will they use my clients information?**





Traction

- **Have they launched their product?**
- **How do they measure success?**
- **How do they intend to grow?**
- **How are people using it?**
- **How often are people using it?**



Testimonials

- **Who is using their product?**
- **What was required of the clinic to make this work?**
- **Can you speak to those practitioners?**
- **Can you visit their hospital to see it in action?**



“Red Flags”

- **They can't explain how their product actually works**
- **You only get screenshots**
- **They won't divulge any information**
- **They are coy about their existing clinics and partners**

Tools to get s#*+! done

Visit vetstash.ca


Veterinary Tools & Tech


Find and rank the best tools to help your practice grow

[View Companies](#)

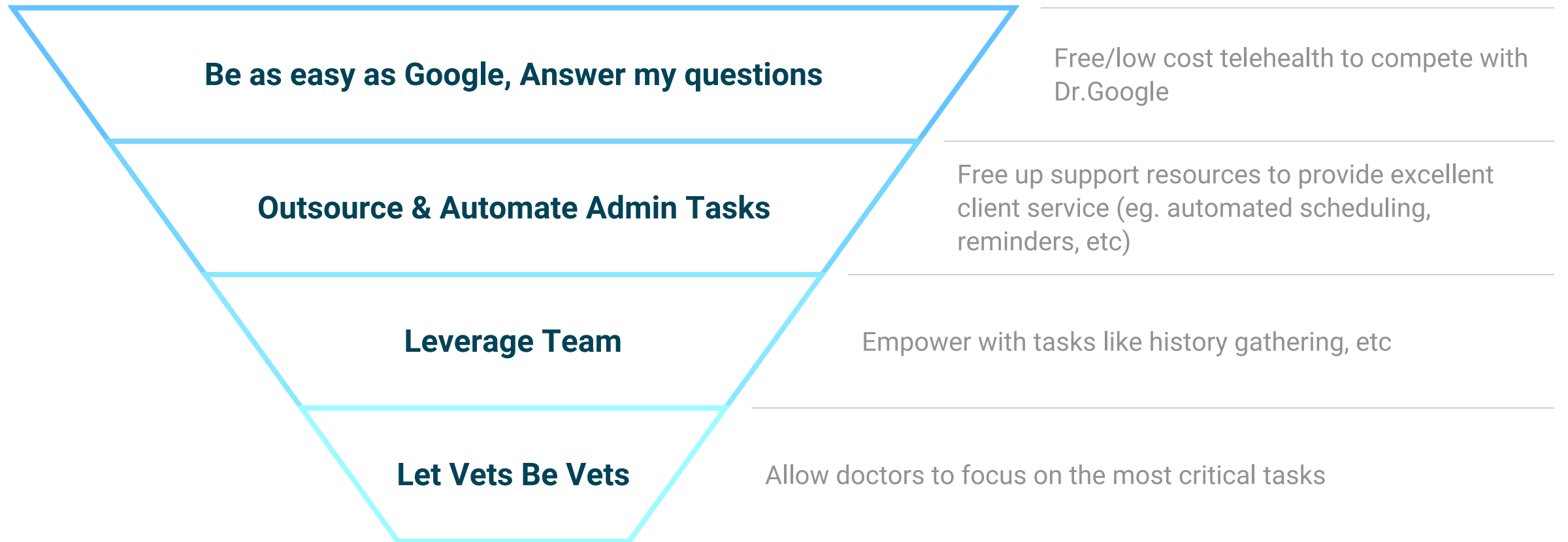
The list

- All
- diagnostics
- telehealth
- client communications
- genetics
- financial
- inventory
- pharmacy
- pims

 **Pet Coach**
PetCoach is the leading source of online veterinarian advice.
telehealth ♥ 0

 **Vet2Pet**
V2P. For Vets. By Vets.
client communications, loyalty ♥ 1

We need to lower the barriers to accessing support and drive more efficient, profitable, & client-centered interactions



Audience Q/A



Thank you!

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