Contents

Editor-in-Chief and Consulting Editors xv
Contributors xvi
Preface xx
About the Companion Website xxi

Section 1

Marketplace 1

1.1 Models of Veterinary Practice, Lowell Ackerman, DVM, DACVD, MBA, MPA 2
1.2 Challenges to the Profession, Peter A. Weinstein, DVM, MBA 4
1.3 Trends in Companion Animal Veterinary Practices, Brian Cassell, DVM 8
1.4 Veterinary Trade Areas, Jan Miller 10
1.5 Today’s Pet Owner, Lowell Ackerman, DVM, DACVD, MBA, MPA 12
1.6 Today’s Veterinarian, Dena D. Baker, DVM 14
1.7 Veterinary Staff, Lowell Ackerman, DVM, DACVD, MBA, MPA 18
1.8 Functioning as a Healthcare Team, Louise S. Dunn 20
1.9 Differing Perspectives of Practice Teammates, Louise S. Dunn 24
1.10 Generational Differences, Randy Hall 26
1.11 Personality Profiling, Lorraine Mothetor List, CPA, CVA 30
1.12 Value Disciplines, Elizabeth Bellavance, DVM, MBA, CEPA 34
1.13 Practice Management Support Professionals, Elizabeth Bellavance, DVM, MBA, CEPA 36
1.14 Stakeholders and Strategic Partners, Elizabeth Bellavance, DVM, MBA, CEPA 38
1.15 Importance of the Human–Animal Bond, Jacqui Ley, BVSc (Hons), BANDC (Canine Behaviour), PhD, DECANZBM 40
1.16 Mergers and Acquisitions, James E. Guenther, DVM, MBA, MPH, CVPM, AVMA, CEPA 42
1.17 Specialty and Emergency Centers, James E. Guenther, DVM, MBA, MPH, CVPM, AVMA, CEPA 44
1.18 Equine Practice Management, James E. Guenther, DVM, MBA, MPH, CVPM, AVMA, CEPA, and Elise Lacher, CPA 48
1.19 Not-For-Profit Veterinary Hospitals, Lowell Ackerman, DVM, DACVD, MBA, MPA 52
1.20 Housecall and Mobile Practices, Dena D. Baker, DVM 54
1.21 Hospice Care, Valerie Adams, CVT 56

Section 2

Client Relationship Management 59

2.1 The Basics of Client Service, Amanda L. Donnelly, DVM, MBA 60
2.2 Client Service Strategies, Randy Hall 64
2.3 It’s Not Your Job . . . It’s Your Responsibility, Peter A. Weinstein, DVM, MBA 68
2.4 Creating a Client-Centered Hospital, Nan Boss, DVM 70
2.5 Creating a Feline-Friendly Hospital, Jane Brunt, DVM 72
2.6 Accountability, Lowell Ackerman, DVM, DACVD, MBA, MPA 76
2.7 Hospital Image, Steven L. May, CVJ 78
2.8 Client Perception and Learning, Dallas McMillan, BVSc, BSc (Hons) 80
2.9 What Clients Expect From Their Veterinarian, Lowell Ackerman, DVM, DACVD, MBA, MPA 82
2.10 Lifelong Excellence in Healthcare, Lowell Ackerman, DVM, DACVD, MBA, MPA 84
2.11 Compliance and Adherence, Karyn Gavzer, MBA, CVPM 88
2.12 Personalized Pet Profiles, Lowell Ackerman, DVM, DACVD, MBA, MPA 90
Contents

2.13 Measuring Client Satisfaction, Elizabeth Bellavance, DVM, MBA, CPA 92
2.14 Telephone Service Management, Karyn Gavzer, MBA, CVPM 96
2.15 Client Appointment Scheduling, Kurt A. Oster, MS, SPHR 98
2.16 Client Reminder Systems, Nan Boss, DVM 100
2.17 Maintaining Regular Client Contact, Robin Brogdon, MA 102
2.18 Client Rewards Programs, Diederik Gelderman, BVSc, MVS, MT-NLP, TAE Cert IV 104
2.19 Client Retention, Kurt A. Oster, MS, SPHR 106
2.20 High-Touch and High-Tech Customer Service, Nan Boss, DVM 108
2.21 The Extended Hospital Team—Making Referrals Work, Amanda L. Donnelly, DVM, MBA 110

Section 3

Communications 113
3.1 Effective Client Communication, James P. Humphries, DVM, CVJ 114
3.2 Speaking as a Professional, Kathleen A. Bonvicini, MPH 116
3.3 Making Clear Client Recommendations, Mary Ann Vande Linde, DVM 118
3.4 Translating Medicalese: Client-Centered Communication, Kathleen A. Bonvicini, MPH, PhD 122
3.5 Shared Decision-Making, Kathleen A. Bonvicini, MPH, PhD 126
3.6 Posing Client Questions Effectively: Open-ended Inquiry, Mary Ann Vande Linde, DVM 128
3.7 Reflective Listening, Kathleen A. Bonvicini, MPH, PhD 130
3.8 Nonverbal Communication, Kathleen A. Bonvicini, MPH, PhD 132
3.9 Empathy, Diederik Gelderman, BVSc, MVS, MT-NLP, TAE Cert IV 134
3.10 Discussing Lifelong Care, Lowell Ackerman, DVM, DACVD, MBA, MPA 136
3.11 Discussing Finances, Lorraine Monheiser List, CPA, CVA 140
3.12 Discussing Behavior, Gary Landsberg, DVM, DACVB, DECAWBM, and Jacqui Loy, BVSc (Hons), MANZCVS (Veterinary Behaviour), PhD, DECAWBM 142
3.13 Discussing Diet and Nutrition, Sean J. Delaney, DVM, MS, DACVN 144
3.14 Discussing Oral Health, Gregg A. DuPont, DVM, Fellow AID, Diplomate AVDC 146
3.15 Discussing Pain Management, Andrea Loomey, DVM, DACVP, CCRP, CVA 148
3.16 Giving and Receiving Feedback, Diederik Gelderman, BVSc, MVS, MT-NLP, TAE Cert IV 152
3.17 Delivering Bad News, Kathleen A. Bonvicini, MPH, PhD 154
3.18 Dealing with Angry or Difficult Clients, James P. Humphries, DVM, CVJ 156
3.19 End of Life Considerations, Katherine Dobbs, RT, CVPM, FAW, and Valerie Adams, CVT 158
3.20 Dealing with a Grieving Client, Katherine Dobbs, RT, CVPM, FAW 160
3.21 Dealing with a Communications Crisis, James P. Humphries, DVM, CVJ 162

Section 4

Financial Management 165
4.1 Time Value of Money, Lowell Ackerman, DVM, DACVD, MBA, MPA 166
4.2 Financial Statements, Lorraine Monheiser List, CPA, CVA 168
4.3 Measures of Liquidity, Solvency, and Profitability, Marsha L. Heinke, DVM, EA, CPA, CVPM 172
4.4 Getting the Most Out of Your Accounting Professional, Mark J. McGaunn, CPA/PFS, CFP 176
4.5 Analyzing Client Transactions, Karen E. Felsted, CPA, MS, DVM, CVPM 178
4.6 Benchmarking, Kurt A. Oster, MS, SPHR 180
4.7 Data You Should Be Reviewing Regularly, Karen E. Felsted, CPA, MS, DVM, CVPM 182
4.8 Making Valid Comparisons Between Practices and Services, Lowell Ackerman, DVM, DACVD, MBA, MPA 184
4.9 Understanding Practice Profitability, Karen E. Felsted, CPA, MS, DVM, CVPM 186
4.10 Pricing Strategies: Markup versus Margin, Lowell Ackerman, DVM, DACVD, MBA, MPA 190
4.11 Breakeven Analysis, Karen E. Felsted, CPA, MS, DVM, CVPM 194
Contents

4.12 Activity-Based Costing and Cost Allocation, Elizabeth Bellavance, DVM, MBA, CPA 196
4.13 Internal Accounting Controls, Mark J. McGaunn, CPA/PFS, CFP® 198
4.14 Return on Investment from Practice Ownership, Karen E. Felsted, CPA, MS, DVM, CFP® 200
4.15 Perquisites (Perks) of Practice Ownership, Elise M. Lacher, CPA 202
4.16 Forgotten Costs of Doing Business in a Veterinary Hospital, Karen E. Felsted, CPA, MS, DVM, CFP® 204
4.17 Capitalization and Depreciation, Mark J. McGaunn, CPA/PFS, CFP® 206
4.18 Accounting Closing Process, Mark J. McGaunn, CPA/PFS, CFP® 208
4.19 Tax Planning, Mark J. McGaunn, CPA/PFS, CFP® 210
4.20 Practice Sales: Planning, Structure, and Methods to Minimize Taxes, Gary L. Ackerman, DVM 214

SECTION 5

CASH MANAGEMENT 219
5.1 Revenue Streams in Veterinary Practice, Karen E. Felsted, CPA, MS, DVM, CFP® 220
5.2 Revenue Budgets and Forecasts, Kurt A. Oster, MS, SPHR 224
5.3 Increasing the Top Line in Practice, Elizabeth Bellavance, DVM, MBA, CPA 226
5.4 Expenses in Veterinary Practice, Karen E. Felsted, CPA, MS, DVM, CFP® 228
5.5 Managing General and Administrative Expenses, Marsha L. Heinke, DVM, EA, CPA, CFP® 232
5.6 Improving the Bottom Line (Profit) in Practice, Jon C. Dittrich, BSIM, MBA 234
5.7 Payroll Management, Kurt A. Oster, MS, SPHR 236
5.8 Ordering Inventory Economically, Angela Aisbet-Schneider, CVT, CFP®, and Lowell Ackerman, DVM, DACV, MBA, MPA 238
5.9 Accounts Receivable Issues in Companion Animal Practice, Elise M. Lacher, CPA 240
5.10 Getting Paid for Services Rendered, Lowell Ackerman, DVM, DACV, MBA, MPA 242
5.11 Pet Health Insurance, Lowell Ackerman, DVM, DACV, MBA, MPA 244
5.12 Payment (Wellness) Plans, Lowell Ackerman, DVM, DACV, MBA, MPA 246
5.13 Credit Alternatives: Third-Party Payments, Louise S. Dunn 248
5.14 Credit and Collections, Amanda L. Donnelly, DVM, MBA 250
5.15 Discounting, Jon C. Dittrich, BSIM, MBA 252
5.16 Practice Reinvestment, James E. Guenthner, DVM, MBA, MHA, CPA, CFP® 254
5.17 Borrowing Money, Marsha L. Heinke, DVM, EA, CPA, CFP® 256
5.18 Buying versus Leasing, Elise M. Lacher, CPA 260
5.19 Controlling Cash Flow: Budgeting, Mark J. McGaunn, CPA/PFS, CFP® 262
5.20 The EFT (Electronic Funds Transfer) Payment Process, Mark J. McGaunn, CPA/PFS, CFP® 266
5.21 Cash Control: Preventing Embezzlement, Elise M. Lacher, CPA 268

SECTION 6

HUMAN RESOURCES 271
6.1 Compensation, Karen E. Felsted, CPA, MS, DVM, CFP® 272
6.2 Benefits, Karen E. Felsted, CPA, MS, DVM, CFP® 276
6.3 Wage and Benefit Summaries: The Whole Package, Karen E. Felsted, CPA, MS, DVM, CFP® 280
6.4 Employee Bonus Criteria, Mark J. McGaunn, CPA/PFS, CFP® 282
6.5 Employee-Related Costs, Karen E. Felsted, CPA, MS, DVM, CFP® 284
6.6 Effective Staff Recruitment, Robin Brigdon, MA 286
6.7 Screening Potential Hires, Randy Hall 290
6.8 Staff Orientation, Rebecca Hart, APR 294
6.9 Staff Training, Karyn Gauzer, MBA, CFP® 296
6.10 Structured On-the-Job Training, Joel Gendeelman, ESL, and Louise S. Dunn 298
# Contents

6.11 Staff Development, Lowell Ackerman, DVM, DACVD, MBA, MPA & 300  
6.12 Motivating the Healthcare Team, Louise S. Dunn & 302  
6.13 Engaging Staff, Robin Brogdon, MA & 304  
6.14 Making Meetings Work, Karyn Gavzer, MBA, CVPM & 306  
6.15 Effective Coaching for the Exam Room, Mary Ann Vande Linde, DVM & 308  
6.16 Mentoring, Kurt A. Oster, MS, SPHR & 312  
6.17 Staff Scheduling Options, Kurt A. Oster, MS, SPHR & 314  
6.18 Staff Performance Evaluations, Shawn G. McCoy, MA, MSW & 316  
6.19 Staff Turnover and Retention, Lorraine Monheiser List, CPA, CVA & 318  
6.20 Measuring Your Human Resource (HR) Performance, Karen E. Felsted, CPA, MS, DVM, CVPM & 322  
6.21 Office Politics, Karyn Gavzer, MBA, CVPM & 324  
6.22 Conflict Resolution, Karyn Gavzer, MBA, CVPM & 326  
6.23 Terminating Staff, Randy Hall & 328  
6.24 Compassion Fatigue, Katherine Dobbs, RVT, CVPM, PHR & 330

## Section 7  
### Marketing Management 333

7.1 The Big Picture: Marketing, Advertising, Promotion, and Public Relations, Rebecca Hart, APR & 334  
7.2 Giving Clients What They Want Most, Lowell Ackerman, DVM, DACVD, MBA, MPA & 336  
7.3 Better Meeting the Needs of Existing Clients (Internal Marketing), Lowell Ackerman, DVM, DACVD, MBA, MPA & 338  
7.4 Attracting New Clients (External Marketing), Robin Brogdon, MA & 340  
7.5 Marketing Plan, Amanda L. Donnelly, DVM, MBA & 342  
7.6 Basic Tools of Marketing, Lowell Ackerman, DVM, DACVD, MBA, MPA & 344  
7.7 Demographic Assessment, David F. McCormick, MS & 346  
7.8 Client and Patient Segmentation, Linda Wasche, MBA, MA & 348  
7.9 Target Marketing, Linda Wasche, MBA, MA & 352  
7.10 Practice Positioning, Linda Wasche, MBA, MA & 354  
7.11 Branding, Dallas McMillan, BVS, BS (Vet) & 356  
7.12 Practice Differentiation, Steven L. May, CVJ & 358  
7.13 Professional Promotion and Publicity, James P. Humphries, DVM, CVJ & 360  
7.14 Client Education Tools, Nan Boss, DVM & 362  
7.15 Paid Advertising, Elizabeth Bellavance, DVM, MBA, CEPA & 366  
7.16 Personalized Marketing That Works: Making the Telephone Ring and the Front Door Swing, James P. Humphries, DVM, CVJ & 370  
7.17 Outbound Telephone Calls, Karyn Gavzer, MBA, CVPM & 372  
7.18 Measuring Marketing Performance, Rebecca Hart, APR & 374  
7.19 Dealing with the Media, James P. Humphries, DVM, CVJ & 376

## Section 8  
### Operations Management 379

8.1 Medical Records and Patient Documentation, Karl Salzsieder, DVM, JD, AVA & 380  
8.2 Patient and Procedure Logs, Kurt A. Oster, MS, SPHR & 382  
8.3 Standards of Care and Care Pathways, Lowell Ackerman, DVM, DACVD, MBA, MPA & 384  
8.4 Continuity of Care, Kurt A. Oster, MS, SPHR & 388  
8.5 Profit Centers, Lorraine Monheiser List, CPA, CVA & 390  
8.6 Value-Added Analysis, Lowell Ackerman, DVM, DACVD, MBA, MPA & 394  
8.7 Continuous Quality Improvement, Elizabeth Bellavance, DVM, MBA, CEPA & 396
## Contents

**Section 9**

**Technology Management**

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.1</td>
<td>Information Technology in Veterinary Medicine, Henry K. Yoo, DVM, MSc, MBA</td>
<td>430</td>
</tr>
<tr>
<td>9.2</td>
<td>Selecting Computer Hardware, Eric D. Garcia</td>
<td>432</td>
</tr>
<tr>
<td>9.3</td>
<td>Selecting Computer Software, Kurt A. Oster, RVT, CVPM, MPH</td>
<td>434</td>
</tr>
<tr>
<td>9.4</td>
<td>Cloud-Based Computing Options, Eric D. Garcia</td>
<td>436</td>
</tr>
<tr>
<td>9.5</td>
<td>Backing Up and Archiving Your System, Eric D. Garcia</td>
<td>438</td>
</tr>
<tr>
<td>9.6</td>
<td>Network Security, Eric D. Garcia</td>
<td>440</td>
</tr>
<tr>
<td>9.7</td>
<td>Electronic Communication: E-mail and Texting, Eric D. Garcia</td>
<td>442</td>
</tr>
<tr>
<td>9.8</td>
<td>Internet Marketing, Eric D. Garcia</td>
<td>446</td>
</tr>
<tr>
<td>9.9</td>
<td>Websites and Search Engine Optimization, Eric D. Garcia</td>
<td>450</td>
</tr>
<tr>
<td>9.10</td>
<td>Social Media, Eric D. Garcia</td>
<td>454</td>
</tr>
<tr>
<td>9.11</td>
<td>Mobile Applications, Eric D. Garcia</td>
<td>458</td>
</tr>
<tr>
<td>9.12</td>
<td>Patient Portals, Eric D. Garcia</td>
<td>460</td>
</tr>
<tr>
<td>9.13</td>
<td>Protecting and Defending Your Online Reputation, Eric D. Garcia</td>
<td>462</td>
</tr>
<tr>
<td>9.15</td>
<td>Technology: Redefining the Client Visit, Eric D. Garcia</td>
<td>466</td>
</tr>
<tr>
<td>9.16</td>
<td>Online Retail: Making it Work, Eric D. Garcia</td>
<td>470</td>
</tr>
<tr>
<td>9.17</td>
<td>Virtual Team Training Consult, Joel Gendelman, GCCL, and Louise S. Dunn</td>
<td>472</td>
</tr>
<tr>
<td>9.18</td>
<td>Putting Your Smart Device to Work for You, Robert D. Gribble, DVM, CVPM</td>
<td>476</td>
</tr>
<tr>
<td>9.19</td>
<td>Internet Use Policy, David D. Barbee, DVM, MS, DACVR</td>
<td>478</td>
</tr>
<tr>
<td>9.20</td>
<td>Digital Communication Policies for Staff, Eric D. Garcia</td>
<td>480</td>
</tr>
</tbody>
</table>

**Section 10**

**Administrative Management**

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.1</td>
<td>Workplace Management, Lowell Ackerman, DVM, DACVD, MBA, MPH</td>
<td>484</td>
</tr>
<tr>
<td>10.2</td>
<td>Organizational Charts, Katherine Dobbs, RVT, CVPM, PHR</td>
<td>486</td>
</tr>
<tr>
<td>10.3</td>
<td>Managing People, Patricia Rutherford, RVT, CVPM, PHR</td>
<td>488</td>
</tr>
<tr>
<td>10.4</td>
<td>Working in Teams, Shawn G. McVey, MA, MSW</td>
<td>490</td>
</tr>
<tr>
<td>10.5</td>
<td>Leadership, Lorraine Monteser Lisi, CPA, CVA</td>
<td>494</td>
</tr>
<tr>
<td>10.6</td>
<td>Implementation: Getting It Done, Robin Broydon, MA</td>
<td>498</td>
</tr>
<tr>
<td>10.7</td>
<td>Emotional Intelligence, Lowell Ackerman, DVM, DACVD, MBA, MPH</td>
<td>502</td>
</tr>
<tr>
<td>10.8</td>
<td>Negotiating 101, Mark D. Samson, DVM, JD</td>
<td>504</td>
</tr>
<tr>
<td>10.9</td>
<td>When to Hire an Office Manager/Administrator, Mark J. McGaun, CPA/PFS, CFP™</td>
<td>508</td>
</tr>
</tbody>
</table>
## Contents

<table>
<thead>
<tr>
<th>Section 10</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>10.10 Staff Performance Planning, Kurt A. Oster, MS, SPHR</td>
<td>510</td>
</tr>
<tr>
<td>10.11 Staffing Budgets, Kurt A. Oster, MS, SPHR</td>
<td>512</td>
</tr>
<tr>
<td>10.12 Employee Manuals, Leslie R. King, JD</td>
<td>514</td>
</tr>
<tr>
<td>10.13 Procedure Manuals, Kurt A. Oster, MS, SPHR</td>
<td>516</td>
</tr>
<tr>
<td>10.14 Enhancing Doctor Productivity, Elizabeth Bellavance, DVM, MBA, CEPA</td>
<td>518</td>
</tr>
<tr>
<td>10.15 Enhancing Team Productivity, Louise S. Dunn</td>
<td>520</td>
</tr>
<tr>
<td>10.16 Changing Organizational Culture, Randy Hall</td>
<td>522</td>
</tr>
<tr>
<td>10.17 Personnel Records, Leslie R. King, JD</td>
<td>526</td>
</tr>
<tr>
<td>10.18 Practice Insurance Needs, Walter Deeg, LUTCF, Financial Advisor, Lifetime Member MDRT</td>
<td>528</td>
</tr>
<tr>
<td>10.19 Employee Benefit Programs, Walter Deeg, LUTCF, Financial Advisor, Lifetime Member MDRT</td>
<td>530</td>
</tr>
<tr>
<td>10.20 Continuing Education Benefits, Karen E. Felsted, CPA, MS, DVM, CVFM</td>
<td>532</td>
</tr>
<tr>
<td>10.21 Not-For-Profit Foundations, Philip Hornsey, Esq.</td>
<td>534</td>
</tr>
</tbody>
</table>

## Section 11

### Practice Safety

<table>
<thead>
<tr>
<th>Section 11</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>11.1 Basics of Meeting Practice Safety Requirements, Lowell Ackerman, DVM, DACVD, MBA, MPA</td>
<td>537</td>
</tr>
<tr>
<td>11.2 Practice Safety Needs, Mark R. Croootof, DVM</td>
<td>538</td>
</tr>
<tr>
<td>11.3 Client Safety, Duane Flemming, DVM, JD, DACVO</td>
<td>540</td>
</tr>
<tr>
<td>11.4 Animal-Related Injuries at the Workplace, Betsy Choder, Esq.</td>
<td>542</td>
</tr>
<tr>
<td>11.5 Security Issues for Hospital and Staff, Bryan M. King, AIA</td>
<td>544</td>
</tr>
<tr>
<td>11.6 Implementing a Safety Plan, Mark R. Croootof, DVM</td>
<td>546</td>
</tr>
<tr>
<td>11.7 Hospital Safety Manual, Philip J. Seibert, Jr., CVT</td>
<td>548</td>
</tr>
<tr>
<td>11.8 Radiation Safety, Ryan King, DVM</td>
<td>550</td>
</tr>
<tr>
<td>11.9 Work-Related Accidents and Workers’ Compensation, Robert E. Kuderer, JD, SA, and S.A. Nilsen, JD</td>
<td>552</td>
</tr>
<tr>
<td>11.10 Emergency Preparedness for Veterinary Professionals, Cheryl L. Elia, JD, DVM, MPH</td>
<td>554</td>
</tr>
<tr>
<td>11.11 Emergency Plans, Philip J. Seibert, Jr., CVT</td>
<td>556</td>
</tr>
<tr>
<td>11.12 Controlled Substances, Karl Salzsieder, DVM, JD, AIA</td>
<td>558</td>
</tr>
<tr>
<td>11.13 Adverse Drug Event Reporting, Douglas Reece, DVM, Elizabeth Bodner, DVM, MBA, CEPA, and Sarah Taylor, DVM, MBA</td>
<td>560</td>
</tr>
</tbody>
</table>

## Section 12

### Legal Issues

<table>
<thead>
<tr>
<th>Section 12</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>12.1 Veterinary Practice Legal Needs and Dealing with Attorneys, Karl Salzsieder, DVM, JD, AIA, and John F. Scott, DVM, JD</td>
<td>571</td>
</tr>
<tr>
<td>12.2 Informed Consent, John F. Scott, DVM, JD</td>
<td>572</td>
</tr>
<tr>
<td>12.3 Malpractice, John F. Scott, DVM, JD</td>
<td>574</td>
</tr>
<tr>
<td>12.4 Unprofessional Conduct, Karl Salzsieder, DVM, JD, AIA</td>
<td>576</td>
</tr>
<tr>
<td>12.5 Privacy Policy and Confidentiality, Gregory M. Dennis, JD, MSL, BSC</td>
<td>578</td>
</tr>
<tr>
<td>12.6 Identity Theft Prevention Programs at the Workplace, Betsy Choder, Esq.</td>
<td>580</td>
</tr>
<tr>
<td>12.7 Employment Contracts, Karl Salzsieder, DVM, JD, AIA</td>
<td>582</td>
</tr>
<tr>
<td>12.8 Partnership Agreements, Stephen W. Cavanaugh, JD</td>
<td>584</td>
</tr>
<tr>
<td>12.9 Buy/Sell Agreements, Karl Salzsieder, DVM, JD, AIA</td>
<td>586</td>
</tr>
<tr>
<td>12.10 Employees versus Independent Contractors, James F. Wilson, DVM, JD</td>
<td>588</td>
</tr>
<tr>
<td>12.11 Non-competition, Lowell Ackerman, DVM, DACVD, MBA, MPA</td>
<td>590</td>
</tr>
<tr>
<td>12.12 Legal Duty to Refer, Duane Flemming, DVM, JD, DACVO</td>
<td>592</td>
</tr>
<tr>
<td>12.13 Extra-Label Drug Use, John W. Thomas, JD</td>
<td>594</td>
</tr>
<tr>
<td>12.14 Disability Law, Karl Salzsieder, DVM, JD, AIA</td>
<td>596</td>
</tr>
<tr>
<td>12.15 Workplace Harassment, Kerry M. Richard, Esq.</td>
<td>598</td>
</tr>
</tbody>
</table>
## Contents

12.16 Fair Labor Standards Act, Kerry M. Richard, Esq. 602
12.17 Ownership versus Guardianship of Animals, Gregory M. Dennis, JD, MS, BSc 606
12.18 Pet Trusts and Wills, Lowell Ackerman, DVM, DACVD, MBA, MPA 610
12.19 Animal Abandonment, Adam P. Karp, MS, JD 612
12.20 Animal Cruelty, Adam P. Karp, MS, JD 614

### Section 13

**Planning and Decision Making** 617

13.1 Career Planning, Christine Merle, DVM, MBA, CVPM 618
13.2 Professional Development Plans, Christine Merle, DVM, MBA, CVPM 620
13.3 Résumé and Cover Letter, Christine Merle, DVM, MBA, CVPM 622
13.4 Curriculum Vitae, Christine Merle, DVM, MBA, CVPM 626
13.5 Strategic Planning and Implementation, Lowell Ackerman, DVM, DACVD, MBA, MPA 628
13.6 Identifying and Solving Practice Problems, James E. Guenther, DVM, MBA, MHA, CVPM, AIA, CPA 632
13.7 Mission and Vision Statements, Jon C. Dittrich, MMS, MBA 634
13.8 Business Plans, Lowell Ackerman, DVM, DACVD, MBA, MPA 636
13.9 Business Entity Structures, Mark J. McGaunn, CPA/CFR, CPFR® 638
13.10 Determining a Practice’s Worth, Elizabeth Bellavance, DVM, MBA, CPA 642
13.11 Purchasing a Practice, Valerie Ewell, DVM, CPFR® 646
13.12 Buying into a Practice as a Partner, David F. McCormick, MS 650
13.13 From Associate to Owner—Beyond the Money, Peter A. Weinstein, DVM, MBA 652
13.15 Debt Management, Elise M. Lacher, CPA 656
13.16 Business Contingency Planning for Veterinary Practices, Cheryl L. Eia, JD, DVM, MPH 658
13.17 Succession Planning, David F. McCormick, MS, and Larry F. McCormick, DVM, MBA, CFA 662
13.18 Planning for the Sale of a Practice, David F. McCormick, MS, and Larry F. McCormick, DVM, MBA, CFA 664
13.19 Gifting Practice Ownership, Mark J. McGaunn, CPA/CFR, CPFR® 668
13.20 Retirement Planning, Mark J. McGaunn, CPA/CFR, CPFR® 670
13.21 Your Next Career (Reinventing Yourself), Louise S. Dunn 672

### Section 14

**Facility Management, Design, and Construction** 675

14.1 Contemplating Practice Ownership—Getting Started, Jan Miller 676
14.2 Building, Buying, or Leasing?, Bryan M. King, AIA 680
14.3 Asset Ownership, Elise M. Lacher, CPA 682
14.4 Financing Basics, Elise M. Lacher, CPA 684
14.5 Selecting a Site, Tony L. Cochran, AIA 686
14.6 How Large Should a Clinic Be?, Tony L. Cochran, AIA 688
14.7 The Construction Process and Working with Architects, Bryan M. King, AIA 690
14.8 Zoning and Permitting, Tony L. Cochran, AIA 692
14.9 Managing Construction Costs, Bryan M. King, AIA 694
14.10 Practice Renovations, Vicki J. Pollard, AIA, NCARB, CVT 698
14.11 Leasehold Improvements, Tony L. Cochran, AIA 700
14.12 Designing with the Patient in Mind, Heather E. Lewis, AIA, NCARB 702
14.13 Client/Patient Flow, Tony L. Cochran, AIA 704
14.14 Integrating Technology, Bryan M. King, AIA 708
14.15 Noise and Odor Control, Heather E. Lewis, AIA, NCARB 712
Contents

14.16 Heating, Ventilation, and Air Conditioning, Heather E. Lewis, AIA, NCARB 716
14.17 Flooring, Bryan M. King, AIA 718
14.18 The “Greening” of Veterinary Practice, Heather E. Lewis, AIA, NCARB 720
14.19 Referral and Emergency Facilities, Vicki J. Pollard, AIA, NCARB, CVT 722
14.20 Pet Boarding and Luxury Accommodations, Vicki J. Pollard, AIA, NCARB, CVT 724

Section 15

Appendices 727

15.1 Finding More Information on Practice Management Topics, Lowell Ackerman, DVM, DACVD, MBA, MPA 728
15.2 Sample Cover Letter and Résumé, Christine Merle, DVM, MBA, CVPM 730
15.3 Sample Curriculum Vitae, Christine Merle, DVM, MBA, CVPM 733
15.4 Sample DEF Veterinary Clinic Business Plan, Lowell Ackerman, DVM, DACVD, MBA, MPA 737
15.5 Sample Marketing Plan for ABC Veterinary Hospital, Amanda L. Donnelly, DVM, MBA 741

Abbreviations 743
Glossary 747
Index 777