

How to choose a *PMS.*

A step-by-step guide for veterinary practices picking a practice management system for the first time, or moving from one provider to another.

PUBLISHED BY

**Veterinary IT
Services**

FOR

**Practice owners &
managers**

STEPS

Sixteen

EDITION

2026

INTRODUCTION

The most significant technical *decision* your practice will make.

A PMS is the lifeblood of a veterinary practice. Its job is to bring every part of the business together: reception, consult room, nursing, dispensary, imaging and management. Getting it right takes a fair amount of time and investment up front, so it is worth taking your time and really considering the options.

We have worked exclusively in the veterinary sector for over 21 years. That means a wealth of experience working alongside PMS providers, helping practices pick a system for a new site, and guiding teams through the process of moving from one PMS to another.

What we have learned is that, although this is a big decision that takes real work, it doesn't have to be a stressful one. Follow the sixteen steps in this guide and you will take most of the pain out of the process.

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STEP 01

Create the 'A'team.

Before you do anything else, put an internal project team together. You will need input from a cross-section of staff, because every member of your team will use the system differently and you need to cover every corner of the business.

This pays off again at implementation. People can be averse to change, and making particular team members a 'champion' of the new system makes the switch as seamless as possible — not to mention making your life easier.



STEP 02

Outline a feature list of what you want the PMS to *do*.

The type of practice you run shapes the type of PMS and features you need. A small animal practice may want an easy way to track patient weights, or to link hospital admission charts with medical histories. In an equine practice, X-rays may be a core service, so saving images straight into patient files for sharing with clients could be invaluable. Large animal practices need to keep up with all the legislation around farm animals, so a PMS that holds the relevant forms and the history of each farm is vital.

The more measurable your research is, the easier the decision becomes. We suggest creating a simple table in Word or Excel. In the left-hand column, list the requirements you expect your PMS to deliver: the functional things that will help your team run the practice day to day.

If you are looking to change provider, there must be a reason. Ask yourselves why you are looking to move in the first place, and which services your current provider is not delivering. Then ask the opposite question: what does your current provider do well? If you do change, the new system has to match and exceed what you have today.

STEP 02 • SOME CONSIDERATIONS MIGHT BE

- ✓ Billing and invoicing
- ✓ Scheduling appointments
- ✓ Client portal
- ✓ Online shop
- ✓ Digital forms and signatures
- ✓ Appointment and vaccination reminders
- ✓ Stock management
- ✓ Financial reporting
- ✓ Payment integration
- ✓ Health plan management



STEP 03

Decide between cloud or local *server*.

Traditionally a PMS ran on a server in the practice. In recent years most vendors have moved to cloud-based systems. Each approach comes with its own costs, advantages and return on investment, and all of them affect your business. The main considerations — beyond "do we have space for a server in the practice?" — are these.



Cost

A local server carries a greater initial cost but lower monthly recurring costs. Cloud is the reverse: minimal up-front spend, larger recurring fees.



Security

Cloud is a full-package service, so security is maintained by the vendor. With an on-site server, the security is yours to manage and maintain.



Resilience

Generally a cloud system is more resilient because the vendor maintains it. We regard a local server as a single point of failure for the practice.



Remote access

Cloud systems allow easier, more secure remote access and almost always have it built in. A local server would usually need an IT professional to set it up.



Management and deployment

Cloud is managed, patched and deployed by the vendor, typically with no hardware to buy. An on-site server has to be specified, installed, updated and maintained by you or your IT partner.



Scalability

Cloud scales with your needs: contact the vendor and adjust the package. A local server always has a ceiling, and there is a real risk of outgrowing it and having to invest again.



STEP 04

Ensure the equipment you have in place is *compatible*.

Your practice already relies on a lot of kit. The question is whether it will work with the PMS you are proposing to move to. That could include printers (standard, label and receipt printers) and diagnostic equipment such as imaging devices and in-house blood analysers.



STEP 05

Review your current *integrations*.

Chances are you have a number of systems that work alongside your current PMS. Would you still need them if you changed the PMS?

Don't forget the integrations you have to keep: insurance, labs, wholesalers, PACS, your accounting system and so on. Will these work with the new PMS? If they do, how — one-way or two-way sync? If they don't, you need to consider replacements, or it may rule that PMS out as an option altogether.



STEP 06

Analyse the gaps in *functionality*.

There is a very high chance the PMS will be unable to do something on your list. That is not necessarily a negative, but you need to ask whether the functionality is essential and, if it is, whether the vendor has third-party partners they would recommend. For example, they may not have a strong telemedicine or online booking option, and something like PetsApp or Vetstoria might fill the gap.

It is important to understand this early, because any add-on needs to be included in the final cost of the solution.



STEP 07

Find out how easy it is to *use*.

You want a system that is clean and as simple to use as possible. Equally, it must not be so simplified that it lacks the information your team needs day to day. The honest challenge is that there is no such thing as a 'simple' PMS, given the sheer amount of information it holds and the roles it performs — but you want to get as close as you can.

Also ask whether your team needs the PMS on a mobile device, for example vets on the road. If so, is it mobile-friendly, or is there an app? And does that app provide the functionality your team actually needs?



STEP 08

Ensure the platform is *secure*.

Yes, of course we are going to highlight this — we are a veterinary IT and cyber security specialist. But it really matters. Under UK GDPR your practice is responsible for looking after client data, which means doing thorough due diligence on the PMS provider you choose.

Find out what they have in place to protect your clients' data and, just as importantly, what they expect you to do.

Take backup as an example

Do they back up your data? When, and how often? Does the backup live in more than one location, and how long is it retained? If you needed a restore, would they charge for it? And what does their disaster recovery plan look like if there is an outage?



STEP 09

Communicate, communicate, *communicate*.

We can't stress this enough. Communication is important in any relationship, and nobody appreciates change being sprung on them — especially when it is the PMS.

Communication is the single most important step in making a migration successful. We are not talking about a few sporadic emails in the days before go-live; we mean a solid communications plan that starts months before.

REMEMBER

Communication works both ways. It is not enough to tell your team that the change is happening. To get real buy-in, help them feel part of the decision. Give them the chance to feed back and raise their concerns about the new PMS before you switch over.



STEP 10

Frequency of development and *updates*.

Something a lot of people forget. The first question to ask is: if you take on the platform, are you entitled to all future updates, or do they come at a cost?

Don't be afraid to ask for the product roadmap. It gives you a clear idea of what they are working on, whether they are heading in the right direction, and whether the things in development are the things your practice would value.

Finally, how often do they actually release updates? If a vendor only updates once every six months or longer, they are not being proactive in developing the platform — and that is never a good sign.



STEP 11

Confirm the level of *support*.

Customer service and support are critical to the decision. What hours do they operate, and will your practice need support outside them? If support is only available during set hours, is there an emergency service should disaster strike — and what does it cost?

You also need to understand what the support covers and what response and resolution times their SLAs guarantee. Your team does critical work, so knowing exactly what to expect from the vendor when something breaks will be a big factor in the decision.



STEP 12

Cost and payment *plans*.

Different PMS solutions offer different payment plans, and these usually depend on whether you have chosen cloud or a local server. Make sure there are no hidden charges. The advertised price is rarely what you end up paying, so ask whether they charge per user or per system, and whether they add bolt-ons for extra features. It is amazing how quickly a PMS can go from affordable to very expensive.

ADDITIONAL COSTS WE HAVE SEEN ADDED

- ✓ Set-up or registration fees
- ✓ À la carte features not included in the basic package
- ✓ Data conversion fees
- ✓ Costs to update the software in future
- ✓ Cost per vet in the practice
- ✓ Cost per additional user

Don't forget to include the costs of the integrations and gap-fillers you identified in Steps 05 and 06.



STEP 13

Check what their customers *think*.

Before you get as far as a shortlist, get an honest view of the PMS and the service behind it. Start by asking the vendor for reference sites so you can speak to their best clients. Then dig deeper and look at independent review platforms such as Google and Facebook.

Find out how many clients they have, and whether those clients are practices of a similar size and type to your own.



STEP 14

Training your *team*.

A fundamental component, and one that should never be disregarded. What does training look like if they provide it? Is it an extra cost? Do they train only your core team, or everyone? And how much training is included?

After the install, do they provide a learning management system or knowledge base that makes it easier for new members of staff to get up to speed?



STEP 15

The implementation *process*.

Before you make the decision, you want a clear understanding of how the vendor will bring their PMS into your practice. The key questions to ask are on the next page.

STEP 15 • CONTINUED

Key questions to ask about *implementation*.

WHAT APPROACH WILL THE INSTALL TAKE?

- There are usually two. The 'big bang' approach is essentially going cold turkey — transitioning to the new PMS on a set date. The 'parallel' approach means running both platforms side by side and gradually increasing reliance on the new system over time.

IS IT A MANAGED INSTALL OR SELF-INSTALL?

- You want a clear understanding from the outset of what you will be expected to do.
- If you are busy, the last thing you want is to be handed the keys to a new PMS and told "over to you".
- Even with a managed install, clarify exactly what the vendor expects from your team and when.
- Once you have that, lock the time into the diary so those tasks don't hold up the project.

HOW MUCH DISRUPTION WILL THERE BE, AND FOR HOW LONG?

- This is key to managing expectations for your team and your clients.
- You can then plan to ease the pressure during the periods the vendor intends to do the work.

CAN THEY INSTALL OUT OF HOURS?

- Hugely helpful if you are not a 24/7 practice — and even if you are, out-of-hours will usually be quieter. Find out whether the work can be done in your less busy periods.

WILL YOU RETAIN ALL THE DATA FROM YOUR EXISTING PMS?

- A really important question. If they cannot migrate your data, significant time will go into manual data entry — which means a lot of time, or money. It may also mean keeping the old PMS running alongside, adding cost and complexity.



STEP 16

Start the *cull*.

Narrow the search to two or three providers. Invite them into the practice to demo the software and make sure it delivers the list of requirements you identified in Step 02. Don't forget that a PMS can tick every box on paper and still be close to impossible to use in reality. Making sure the dashboards and interfaces suit the skill level of you and your team is vital.

Requesting a demo or trial also lets you experience their customer service first hand. Send each provider an initial enquiry and see who responds fastest, and how prompt and efficient they are in their communication.

When you do get them in, ask them what they think the negative aspects of their own PMS are. The answer tells you a lot about their honesty and integrity.

A shortlist checklist

Feature list scored · cloud or server decided · equipment and integrations confirmed · gaps and add-on costs priced · security and backup answers in writing · support SLAs understood · total cost over three years · references spoken to · training and implementation plan agreed.



CONCLUSION

Take it one step at a *time*.

Picking a PMS for a new practice, or changing from one provider to another, is a huge undertaking whether you have done it before or not. We know this guide contains a lot of information, so take the time to understand each section and tackle them one at a time.

Remember, you are not alone. You have a wonderful and supportive community of vets who have done exactly the same thing and will be full of knowledge and willing to help. And if you have a more technical question, don't be afraid to reach out to a professional with real experience of the veterinary sector. Our team is here to help — book a free consultation at a time that suits you.

ABOUT US

Built for veterinary. Not retrofitted for **IT**.

We have worked exclusively in the veterinary sector for over 21 years, helping practices pick the system that works best for them and guiding teams through the move to a new one. If you have any questions at all, please get in touch — we are here to help.

[Book a free consultation →](#)

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