

CLIENT IMPACT CASE STUDY

FLORIDA • SMALL ANIMAL MOBILE PRACTICE



BACKGROUND & CHALLENGES

This mobile veterinary practice in Newberry, Florida was operating with active bookkeeping, but without the structure needed to support meaningful decision-making. With six DVMs and a growing team, leadership lacked clear visibility into financial performance and key cost drivers. Financials were categorized into broad, non-specific accounts with no AAHA Chart of Accounts structure in place, limiting insight into Cost of Goods Sold, revenue streams, and net income. As a result, reporting did not support operational or strategic decisions, leaving leadership without clear answers to critical questions around spending, hiring readiness, and overall financial health. While the data existed, it lacked the clarity and organization needed to guide the practice forward.

Practice Type: Small Animal Mobile Care

Location: Northern Florida

DVMs: 6 FTE veterinarians

Staff: 12 staff members

Hours: Monday – Friday (8 am – 6 pm)

SOLUTIONS

FINANCIAL STRUCTURE & STANDARDIZATION

The practice was transitioned to the AAHA Chart of Accounts, replacing broad categories with detailed, veterinary-specific financial tracking. Historical transactions were cleaned up and reclassified to accurately reflect key areas such as lab, pharmacy, inventory, and administrative costs.

REPORTING & VISIBILITY

Clear, actionable Profit & Loss statements were developed to provide both high-level insights and detailed category visibility. Financial reporting was aligned with how the practice operates, ensuring consistency between bookkeeping and day-to-day operations.

CONSISTENCY & WORKFLOW

Standardized monthly bookkeeping workflows were implemented to ensure financials are accurate, up to date, and delivered consistently. This created a reliable rhythm of reporting that leadership could depend on month after month.

RESULTS



Financial Clarity

Implemented a **clean, AAHA-aligned P&L** with detailed category tracking.



Visibility

Established full visibility into **revenue, COGS, operating expenses, and net income.**



Consistency

Monthly financials are now **accurate, reconciled, and delivered on time.**



Decision-Making

Leadership now uses financials to confidently **guide hiring, budgeting, and growth planning.**



Confidence

Financial data is now **trusted, understood, and actively used** by leadership.