



## WUTCHIETT TUMBLIN AND ASSOCIATES

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Better Management is Better Medicine®

### 7 Easy Steps to Enable Change – 2010

The last two years have presented a variety of opportunities resulting from economic shifts. Veterinarians and team members have risen to the challenge and kept their practices operating smoothly, even improving processes and profit margins. As we draw to the close of 2010 who knows exactly what 2011 has in store, but creating a tactical plan based on what you do know will help you navigate through the next year and into the future.

#### *Preparing for a Tactical Planning Meeting*

Follow these fool-proof steps to get your tactical planning meeting off to a great start.

- Schedule at least once a year
- Select a location (off-site offers fewer distractions)
- Select a facilitator
- Develop and distribute an agenda
- Identify the participants and request advance preparation
- Designate a recorder for the day of the meeting

Tactical planning begins with a meeting involving the management team. Take a look at “Preparing for a Tactical Planning Meeting” for tips on how to organize the meeting, and see **Figure 1** for what Well-Managed Practices include on their tactical planning agendas. Once you’ve assembled your management team (see **Figure 2** for who Well-Managed Practices include on the team), the fun begins. Yes, fun. Someday you want your practice to gross \$1 million, or \$5 million, you’d like that shiny new piece of equipment, the facility could really use a facelift, or you’d love to give your staff a well-earned raise. Wouldn’t it be great to be able to do one (or all) of the above? Sit down at least once a year and use the following seven steps to help you face and conquer change and to achieve your goals.

1. Identify your practice’s strengths, challenges, and opportunities. What do you do better than any other practice in the area? That’s a strength. If you can’t think of an answer to that question, you have an opportunity. Strengths may include high scheduling rates and client satisfaction. Opportunities may mean improvements when it comes to client service, patient care, and the hospitals standards of care, or taking advantage of an untapped market niche. Challenges can include a new practice coming to the area, industry-wide changes, or a decline in new client numbers.

2. Develop next year’s goals. Given what you know from the strengths, challenges, and opportunities you recorded, plot the direction your practice will take in the short-term (next one to two years) and in the long-term (next three to five years). Cover the following five areas of management:



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**Medical development** - Does the practice currently have hospital standards of care? If not, what elements of the standards of care will the practice develop for next year? Does the practice have a niche in a certain procedure? How can the practice make clients aware of that niche procedure?

**Staff development** - What external continuing education will staff attend? What continuing education will be offered at the practice? How will compensation and benefits change, if at all? How will you present changes to the staff? Will you need to hire additional staff? If so, which position(s) will you fill, what will the starting pay scale be, who will train the new hire(s), and how will you communicate the staffing changes to your team?

**Client development** – Is your team active in the local community? Is your community aware of your services (both for-profit and volunteer)? You offer continuing education for your staff, but what sort of continuing education can you offer for your clients? Consider hosting an open house and providing information on your services, or letting the community know what's going on by adding a calendar of practice events to your website. (If you don't have a website, that's an opportunity.)

**Facilities, equipment, and technology management** – What aspects of the facility need a facelift or outright renovations? What equipment purchases do you need (or want) to make this year? In the future?

**Financial management** - Compare last year's budget to last year's actual performance. Note the differences and review the proposed budget for the upcoming year. (The proposed budget will be completed prior to the tactical planning meeting by the management team.) It's perfectly fine to make changes to the budget based on decisions made in other management areas or as a result of unforeseen challenges or opportunities in the marketplace (i.e. changes in staff compensation or staffing, equipment purchases, an influx of new clients, etc.).

3. Create an action plan. To reach the short-and long-term goals you defined in each management area, you'll need to prioritize those goals and identify the steps that must be accomplished to reach those goals. Your action plan should be a brief description of what must be accomplished for the practice to reach its goals. Include a timeline for completion of the items in your plan with a goal of completing two to three items every two months. See **Figure 3** for samples goals (discussed above) and action plan.

4. Implement your action plan. After the tactical planning meeting, communicate your recently created goals and the corresponding action plan to your staff. Explain the logic behind your decisions so your staff understand the purpose of their new goals. You'll get better buy-in from your staff if you legitimately consider, and possibly accept, their input on the action plan and the implementation process. After all, they'll be the ones doing most of the work. Delegate responsibilities so everyone knows who's responsible for what action item.



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5. Measure results. What gets measured gets done, so quantify as much of the action plan as possible in terms of progress and results. Then periodically discuss the results of the team's efforts in implementing the action plan and moving toward the goal.

6. Review the action plan as necessary. Monitor progress toward goals monthly, and if implementation of the action plan isn't where it should be, take steps to get back on track. Correct mistakes as they occur by asking your team what they have learned from their mistakes and how will they use what they've learned to move toward their goals. Review the action plan as necessary based on current trends and unexpected situations. It's ok to change the plan (and the budget) later if you realize either was unrealistic.

7. Celebrate your successes. Track improvements and accomplishments for individual staff members and the practice as a whole. Aim for progress, not perfection. An occasional pat on the back will help encourage forward movement.

You can't plan for every eventuality, but you can plan for some. Use last year as your baseline for next year's tactical plan. Learn from your mistakes, set quantitative goals that can be easily measured, and create a plan to ensure you achieve your goals. Monitor your progress and celebrate your accomplishments, and no matter what happens next year, you'll be prepared.

### Figure 1

#### What topics are usually included on the agenda?

Here's what Benchmarks 2010 participants said:

Financial management (review of operations, budgeting)	87%
Client development (marketing, promotions, assessment of needs)	87%
Equipment and technology upgrades	79%
Facility management (planning for repairs, renovations, expansion)	74%
Practice goals for the next one to two years	71%
Developing an implementation plan to reach goals	57%
Compensation (practice owners, associate veterinarians, staff)	43%
Practice goals for the next three to five years	16%



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### Figure 2

#### Who's involved in tactical planning meetings?

Here's what Benchmarks 2010 participants said:

Practice owner(s)	100%
Practice manager	74%
Associate veterinarian(s)	46%
Hospital administrator	37%
Staff members	25%
Bookkeeper	18%
Other (please specify)*	9%

\*Other responses: management team, outside consultant, accountant, everyone

### Figure 3

#### Sample Goals and Action Plan

##### **Team Goals**

1. Elevate patient care
2. Enhance client service
3. Invest in new technology
4. Raises for doctors and staff

##### **Action Plan**

1. Increase ADT
2. Increase client visitation
3. Increase number of new clients

#### **To obtain additional information:**

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