Management

Key areas to monitor include client satisfaction via net promoter score; active client numbers; average annual client spend; team harmony and engagement with sick days; staff turnover; clinical performance with repeat consultation rate (C2:C1 ratio) and diagnostic ratio; and finally any new or ongoing initiatives.

KEY LEARNING OBJECTIVES

- How to choose what matters and build an informative panel of data
- Some suggestions for useful key performance indicators (KPIs)
- The common pitfalls with KPIs and how to avoid them

MULTIPLE CHOICE QUESTIONS

1. Which of the following metrics would help monitor veterinary surgeon performance?
(A) Diagnostic ratio
(B) C2:C1 ratio

- (C) Turnover as a multiple of salary
- (D) All of the above

2. Which of the following metrics is the most likely to represent a useful figure to assess which of several practices is the most successful financially?
(A) Total active client numbers
(B) Percentage profit
(C) Total turnover
(D) Turnover per full time equivalent veterinary surgeon
3. Which of the following statements is true?
(A) KPIs always give you useful information
(B) A trend in a KPI is more useful than the actual figures
(C) A KPI should always be considered alongside others and the reality of what is actually happening
(D) KPIs convince team members to change their habits

Keeping the flame burning: creating a culture of excellence

Alan Robinson

Culture eats strategy for breakfast — Peter Drucker

Building a strong culture of team engagement and high performance is the goal for every practice. Leadership and culture are the two sides of the same coin. When these are established many of the challenges of management seem to disappear as if by magic.

With these new rules of engagement there is a significant shift in business direction:

- Busyness turns to flow and trust
- Need for profit turns to a desire for legacy and purpose
- Need for control turns to autonomy and accountability
- Performance management turns to mastery and progress
- Employment turns to engagement and energy.

As discussed previously there are three principles of team engagement and intrinsic motivation:

- A sense of purpose and legacy: 'Why do we want to go to work?'
- A sense of mastery and progress: 'What do we need to be good at?'
- A sense of autonomy and accountability: 'How do we want to work?'

This talk discusses tools and strategies to embed these intrinsic motivators for engagement into your practice as well as the conditions for engagement. Be aware of the number one killer of engagement — the 'busy-trap' of too many clients and too much work. You do not need to do MORE work. You need to be LESS BUSY so you can do BETTER work.

Most practices are too busy:

- To make money
- To practice good medicine
- To practice good customer service
- To learn and master new skills.

BUSY does NOT mean profitable. Busy just means ... busy!

Culture is not just a team-management issue. This works at the heart (literally) of our clinical capability. In '*We need to talk about error: causes and types of error in veterinary practice*' (Veterinary Record, October 2015, C. Oxtoby, E. Ferguson, K. White, L. Mossop) they identified three primary reasons for mistakes in clinical practice in UK veterinary practices:

- Cognitive limitations (overload — too busy)
- CPD — deficiencies in non-technical skills (poor communication skills and structures)
- Continuous improvement approach to error not used.

Leadership responsibilities of the top 5% of practices appear to be:

- Developing a shared vision and goals with the team
- Managing yearly and quarterly planning process
- Implementing protocols and continuous improvement processes
- Accessing accurate and timely data to make wise decisions
- Creating clear management structures

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- Creating and using clear and frequent communication structures
- Using robust decision and delegation structures.

KEY LEARNING OBJECTIVES

- Learn and understand the five stages of team engagement
- Create a toolbox of processes for increasing intrinsic motivation in practice
- Understand the key leadership skills that lead to a culture of excellence

MULTIPLE CHOICE QUESTIONS

1. What is the practice vision a statement of?
 - (A) The future reality of the practice as life should be to engage all the team
 - (B) The business plan
 - (C) A list of goals to be achieved in the next few years
 - (D) A list of all the practice achievements in the last year

2. What are the practice values?
 - (A) Protocols to be used when dealing with clients
 - (B) How much the practice is worth
 - (C) A set of agreed attributes that drive the culture and behaviour of all team members
 - (D) A set of rules to follow blindly to maintain consistency
3. The building of a robust team culture can be seen as a five-stage process of shifts of activity in which employment turns to engagement and energy. What does the process begin with?
 - (A) Performance management turns to mastery and progress
 - (B) Busyness turning to individual flow and team trust
 - (C) Pursuit of profit turns to a desire for long-term legacy and purpose
 - (D) Need for management control turns to autonomy and accountability

Failing to plan is planning to fail: getting the process right

Rebecca Robinson

Too often in practice we have goals or ideas which never come to fruition. There are many reasons for this: some of the most frequently cited include lack of time, not enough money and poor team motivation.

Good, clear and well thought-out planning is the first step in addressing many of these challenges. The plan needs to be aligned with the long-term goals and vision of the practice; it also has to seem achievable and be a meaningful step along that journey. The starting point needs to be working out the desired end result and then breaking it down into interim short-term goals. This is key to making the ultimate outcome feel more attainable. It also ensures momentum is built as each interim goal is ticked off and celebrated.

So, what should be planned? In short, any change, small or large, that involves one person or more. When should it be planned? As soon as the decision is made to make the change. It doesn't matter if there needs to be a delay for any reason — this can be planned in. It is also important to appreciate that within any plan, flexibility and adaptability may be necessary, rather dogmatically sticking to what was first agreed, as long as the end result

is achieved in the right way. The key is to create an easy-to-understand plan for everyone.

This process is easier for some people than others and it is important to get the right people involved for each stage and then to engage all those involved in the implementation. To do this the planning needs to consider why, what, when, who and lastly how. The order of answering these questions is something that is often overlooked, and yet makes a tremendous difference to how successful the plan will be.

'What' refers to the actual idea, the ultimate goal or end result, and is where you can use your creative, blue-sky thinkers most effectively. 'When' is the next question asked to establish the correct timing for implementing the plan. Deciding 'who' is going to need to be involved helps to bring in those who will galvanize the team. Leaving the 'how' until last is important to avoid getting hung up on the detail too early and to prevent the process from stalling. Those team members who are more detail-focused and process orientated are best suited to answering 'how' and developing the more detailed interim steps and shorter-term goals that will be needed to move to completion. Overarching all of these questions and steps is the 'why' — the purpose for choosing the outcome and putting the plan together. A compelling 'why' will lend energy, drive and enthusiasm to the achievement of the goal.

KEY LEARNING OBJECTIVES

- Why it is useful to plan
- An understanding of a simple planning tool
- Some simple techniques to help make any plan seem achievable

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