

Accelerate Mastermind Group

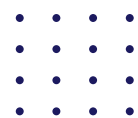
MISSED OPPORTUNITIES



AMG Program
Workbook



Accelerate
Practice
Academy



Missed Opportunities

Situations that a missed opportunity could occur.

1. Simply forgot to bill it out.

- AI note taker for consults and procedures
- Create awareness about impact on business
- Develop templates for as many procedures as possible
- Travel sheets
- Invoice checker
- Change process to vets don't bill

2. Did something but didn't bother to bill it out because of "wallet guardian disease"

- AI note taker for consults and procedures
- Create awareness about impact on business
- Consult Room Conversion training
- Invoice checker
- Change process to vets don't bill

3. Didn't think it was "worth doing" (e.g. dental, ear swab, blood test on vomiting dog, pre-anaesthetic fluids)

- Awareness training
- Develop agreed standards of care for common conditions WITH team.
- AI note taker
- Change process to vets don't bill
- Invoice checker

4. Forgot to ask if they would like to go ahead with product or service

- Training
- Create awareness about impact on business
- Use trigger mechanism to remind them. E.g. "Ask clients about pet food" sign on phone



5. Not charging for hidden expenses You must make these automatically on bill as a “opt out”

- Charge for all consumables (gloves, sutures material, polishing cups etc.)
- Include medical disposal fee on template
- AI note taker for procedures
- Invoice checker

6. Missed reminders

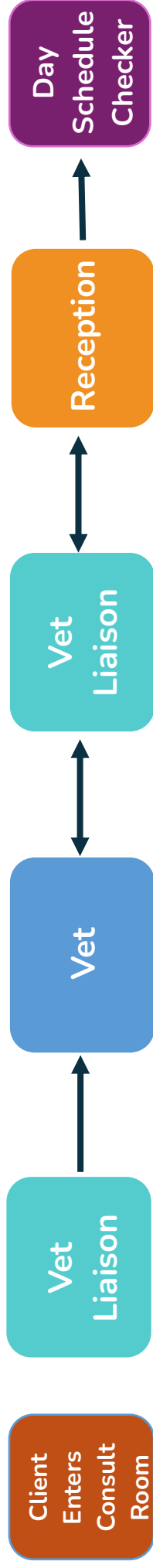
- AI note taker
- Invoice checker

How To Get Team Buy In

1. **Nominate 1 person to check ALL invoices** for a week before payment is made to check with all of the above. Check in with vet if they think anything has been left off
2. **Do the \$100-coin game with team** to bring awareness to cost of business
3. **Show them results of missed charges** for one week and extrapolate over 1 year
4. **Get team to develop strategies** that they could use to overcome the varies areas of missed charges. Use the above solutions as guides. Get the team to set a goal as to how low missed charges can get to



Missed Opportunities Timeline



VL prep for consult:

- Presentation? 1
- Previous Dental Score? 1
- Existing conditions? 1

- Comprehensive examination 2

- Adherence to standards of care 3

- Clear & consistent communication with client 2

- Double check notes & prescription 3

- Comprehensive note taking 1 4

- Create invoice 4 5

- Reminders – create, update, align 1 3

- Elicit further information from vet if required. Eg what's the dental score? 3

- Thorough hand-over to reception 1

- Reiterate or expand on vet recommendation with client 2 3

- Scribe prescription under guidance from vet 1 3

- Estimates 3 4 5

- Clear handover to reception 1

- Double check invoice 1

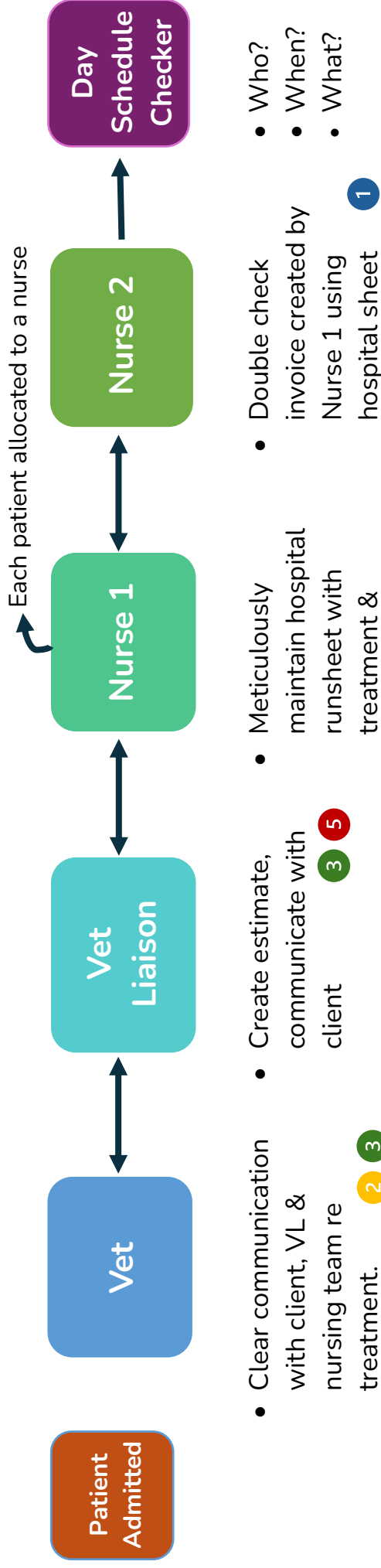
- Book future appointments 1

- Create treatment plan 1

- Estimates 1 3 5

- Who?
- When?
- What? 1

CONSULTATION



ADMISSION

Trouble Shooting:

What's the System or Resource

1

System

2

Consult Room Formula

3

Standard of Care

4

AI (Whippet Notes)

5

Bundles / Group Items





FRONT END DAILY CHECKLIST

Things to look out for Vet notes, standards of care, invoices, patient reminders and corresponding future booked appointments.

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Check for deceased or inactive pet?

Double check the pet's status: if pet is deceased OR no longer comes to the clinic make sure pet's profile and owner's profile (if appropriate) are inactivated AND reminders/ future appointments are deleted.

Check for missing Vet notes? This checks consistency of practice standards of care.

Look at the vet's notes for the last visit, i.e. consults AND procedures. If there any vet notes are missing, put a note on the Day Schedule for the vet to add notes. Does the vets' recommendations follow agreed practice standards of care? E.g. has a dental score been noted and appropriate recommendations made. (Reminders section: This ensures a thorough reminder service.)

Check for reminders for diagnostics/ treatments?

Do the vet notes indicate that reminders need to be created, e.g. a reminder for an arthritis injection in a month, a cardiac recheck plus bloods in 3 months, ACTH stim test in 6 months? If they're missing, add in these reminders.

Check for reminders for Pathology tests?

If bloods, urinalysis etc. were done, were results recorded on file AND reported to O? Are the tests to be repeated in future? Check vet notes and set reminders if needed.

Check for reminders for chronic medication?

Has the pet been on chronic medication recently? E.g. skin, arthritis, cardiac, kidney, Addison's etc. Then look at the Chronic Medications Standards of Care sheet to see what reminders need to be set, and when, for a particular chronic medication.

Check ProHeart reminders set?

Look at the Summary tab - if a dog has had ProHeart in the past, but there isn't a ProHeart reminder, this needs further investigating!

Have Dental health check reminders been set?

If there is no dental score on the Vet's notes from the last few checks, this needs to be investigated. If the pet has had a dental procedure and dental health check reminders aren't set, do so.

Are reminders aligned?

In order to avoid multiple visits, align appointments where possible, e.g. Dental health check and vax reminders a month apart should be brought together. Note: FIV and ProHeart reminders have greater time restrictions, so align other reminders to them, not the other way round.

Check invoices are correctly billed. This is looking for missed charges and practice standards of care.

Are there any missing / odd looking items on the invoice, that need further investigating?

Check future appointments set?

Once you've sorted out the reminders, look at the future appointments - there should be corresponding booked appointments for at least the next reminder (of any kind) AND for the next vax reminder. If you have a two appointments close together, one of them may be redundant – check the vet's notes, and if one of them can be deleted, contact the client to see which time they prefer.

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Veterinary Liaison

The role of the veterinary Liaison is to:

- Assist the veterinarian in creating an exceptional client experience and patient outcomes
- By performing tasks during the consultation that do not necessarily have to be completed by the veterinarian.

These tasks include:

1. Completing consultation notes in the appropriate notation template
2. Invoicing
3. Ensuring all the appropriate equipment, instruments or drugs required for that consultation are close on hand
4. Checking and reporting all relevant clinical history eg. Vaccination status, previous dental score, specialised diet, allergies and previous reactions
5. Scribing medication labels prescribed by veterinarian
6. Making up relevant medication and providing first dose to patient (if applicable), explaining to client how to dose or handing over to reception for further instructions
7. Preparing samples and pathology requisitions for external pathology submissions
8. Preparing and presenting estimates to the client
9. Admitting and or booking in patients for further treatments
10. Ensuring all reminders are up to date or updated
11. Ensuring all client and patient details entered correctly or updated
12. Detailed handover to reception including treatment overview and plan & future appointments
13. Ensuring consulting room is disinfected, cleaned and organised in accordance with relevant standards
14. Discussing all aspects of treatment relevant to wellness eg. parasiticides, vaccinations, desexing, dental health, nutrition, training & nutraceuticals



To consider:

- The role requires a high degree of agility and communication between the veterinarian, VL and reception team
- The vet retains responsibility for their clinical records and it is imperative that these are checked at the conclusion of the consultation
- The VL is not responsible for restraining the patient
- Having a VL in the consulting room does not negate the necessity for patients that would have under appropriate circumstances be removed from the consulting room to the treatment room, to attempt treatment or examination in the consulting room
- Once the patient is taken to the treatment room, the patient becomes the responsibility of the treatment room nurse and attending veterinarians (this gives the VL the opportunity to continue to complete clinical notes, schedule lab requisitions as relevant, complete the invoice and estimate as relevant and complete the patient prescription.
- If the veterinarian leaves the room to examine a slide unless the VL is engaged in relevant treatment discussion with the client, they are to remove themselves and continue to complete clinical notes, schedule lab requisitions as relevant, complete the invoice and estimate as relevant and complete the patient prescription.
- In between consultations, all time should be used productively either in the hospital or reception (as is relevant). It is however imperative that the VL is available as soon as consultations resume.



100-Coin Game:

The outcome of this game is to give your team an “experience” of the expenses of running a practice. The outcome is they will be aware of cost savings, the importance of not missing charges, billing correctly, making good recommendations and valuing themselves.

Setup:

Get 100 coins of any denomination. More effective with \$1 coins as it has more impact, but any denomination will work.

Get your last profit and loss statement and put the expenses into the general categories below.

The aim of the game is to try and figure out the expenses of running your vet practice. To make it more of a game, you can split them into competing teams for the one that gets it closest. Each team will need 100 coins.

Paint the scenario for them.

Assume the practice turned over \$1 million exclusive of GST (to make it easy calculations for them.) The 100 coins represent the \$1 million income.

Read out the categories involved in running a business and they need to remove the coins that they think represent the amount you'd need to allocate of that \$1 million to cover the cost.

1 coin = 1%

E.G. If you read out computer expenses, they may think it would be 2% so they would take 2 coins out of the 100 and put them into the “expenses pile”.

Once you read it out, they take away the coin and record the % and what it was on a sheet.

If they nominate 0.3% for a category, then keep counting these smaller amounts until they equal at least one coin and then remove it.

Once they have agreed how much to allocate, they cannot change it.

Read out expense categories items one at a time off your profit and loss statement without reading the actual percent figures.

Below are the categories I'd suggest you use. Don't use a massively detailed p/l or it will get too tedious for them. I've included the average percentages that you could expect in a \$1 million turnover practice with a 20% nett profit to use as a target for the team if your nett profit is lower.

In a \$1 million turnover clinic these are the ballpark figures you should expect if you want to get 20% nett profit

Cost of goods sold: Goal in 20% clinic 22-25%% = \$220 000 - \$250 000

- Wholesaler bill for drugs, food, consumables 21%
- Laboratory expenses 3%
- Cremation costs 0.5%

Expenses: (Aim for 19%) = \$190 000

- | | |
|---|---------------------|
| • Accountancy | 1.2% |
| • Advertising/Promotions | 1% |
| • Credit card merchant fees | 0.5% |
| • Cleaning/products | 0.3% |
| • Computer expenses | 0.8% |
| • Electricity | 0.6% |
| • Equipment costs (lease, repairs.) | 2% |
| • Insurance | 1% |
| • Interest (5%) of money you borrowed | 3% |
| • Maintenance/Renovations on building | 1% |
| • Miscellaneous (the unexpected costs.) | 1.5% |
| • Pay back loan capital: | 1.6% (30-year loan) |
| • Phone and internet | 0.7% |
| • Postage/printing/ stationary | 0.6% |
| • Rent | 5% |
| • Training/conferences/staff amenities/ Subscriptions | 1.5% |

Wages: Aim for 35% = \$350 000

- Wages/Superannuation (includes owners wages.) 35%

Then remove 30% for tax.

Discussion questions:

- a) Who ran out of money?
- b) Now go thru and show them your profit and loss figures using the coins.
- c) Then show them a healthy practice (can show this on a PowerPoint, a handout or write on board).
- d) What did they learn? Get them to share their learnings.

Points to cover:

- Going to the vet is expensive but how often are we overcharging...highly unlikely.
- Turnover is vanity, profit is sanity. **Expenses kill a business.**
- Stress the **important of running a business as efficiently as possible.**
- When getting busy, can you identify systems to become more efficient rather than putting another person on.
- **Importance of billing correctly, missed charges.**

If you are unprofitable with a small turnover, you will be unprofitable with a large turnover.

Workshop Questions:

What could we do to increase the efficiency of the business?

Where could we increase income without an increase in expenses?

Owner: [Redacted]
Address: [Redacted]

Patient Name: Shadow
Date: 05-06-2024
Invoice number: 534919

PAYMENT RECEIPT

DESCRIPTION	QTY	TOTAL (incl)
Hospital Fee Dog	1	\$140.00
Consultation	1	\$95.00
Heska TAHP	1	\$270.00
Heska CBC	1	\$0.00
Heska Comprehensive Plus Panel	1	\$0.00
I/V Fluids Infusion & First Bag	1	\$185.00
I/V Fluids Extra Bag	1	\$90.00
Carafate 1gm 120's	10	\$31.95
Losec 20mg	6	\$33.30

COMMENTS

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This is a tax invoice from Veterinary Clinic.
Thank you for entrusting us with your pet. We look forward to seeing you next time.
Next appointment: 12-10-2024 12:20:00pm

Subtotal: \$845.25
Including GST: \$76.84
Total: \$845.25
Paid: \$845.25
Total discount: -\$363.63
Payment Method: Eftpos/Visa/Mastercard : -500.00 Eftpos/Visa/Mastercard : -345.25
Due: \$0.00

Owner: [Redacted]
Address: [Redacted]

Patient Name: Shadow
Date: 06-06-2024
Invoice number: 534985

PAYMENT RECEIPT

DESCRIPTION	QTY	TOTAL (incl)
Hospital Fee Dog	1	\$140.00
I/V Fluids Extra Bag	2	\$180.00
Heska Kidney Panel	1	\$120.00
Prevomax Injection	3.9	\$103.81
Rounding	1	-\$0.01

This is a tax invoice from Veterinary Clinic.
Thank you for entrusting us with your pet. We look forward to seeing you next time.
Next appointment: 12-10-2024 12:20:00pm

Subtotal: \$543.80
Including GST: \$49.44
Total: \$543.80
Paid: \$543.80
Total discount: \$0.00
Payment Method: Eftpos/Visa/Mastercard : -\$43.80
Due: \$0.00

Owner: [Redacted]
Address: [Redacted]

Patient Name: Shadow
Date: 07-06-2024
Invoice number: 534977

PAYMENT RECEIPT

DESCRIPTION	QTY	TOTAL (incl)
Heska Pre-surgical Panel	1	\$0.00
In House Pcv And Tpp	1	\$0.00
Heska Prep	1	\$105.00
I/V Fluids Extra Bag	2	\$180.00
Prevomax Injection	3.9	\$103.81
Rounding	1	-\$0.01

This is a tax invoice from Veterinary Clinic.
Thank you for entrusting us with your pet. We look forward to seeing you next time.
Next appointment: 12-10-2024 12:20:00pm

Subtotal: \$388.80
Including GST: \$35.35
Total: \$388.80
Paid: \$388.80
Total discount: -\$140.91
Payment Method: Eftpos/Visa/Mastercard : -388.80
Due: \$0.00

Owner: [Redacted]
Address: [Redacted]

Patient Name: Charlie
Date: 11-06-2024
Invoice number: 535026

PAYMENT RECEIPT

DESCRIPTION	QTY	TOTAL (incl)
Heska CBC	1	\$0.00
Heska Comprehensive Plus Panel	1	\$0.00
Vcheck CpL Test	1	\$0.00
Heska Canine Pancreatic Profile	1	\$355.00
Premedication Sedation	1	\$120.00
General Anaesthesia induction and first 15 minutes	1	\$285.00
General Anaesthesia maintenance per 15 minutes	5	\$425.00
Theatre Fee Minor	1	\$110.00
Theatre Surgery Time	1.5	\$1192.50
Nurse Fee	2	\$150.00
Consumables - in surgery	1	\$90.00
Prevomax Injection	0.58	\$44.38
Noroclav Injection	0.58	\$31.37
Enrotril Injection	0.58	\$30.62
Methadone 10mg/MI 20ml	0.08	\$48.92
I/V Fluids Infusion & First Bag	1	\$185.00
Hospital Fee Dog	1	\$140.00
Rounding	1	-\$0.04

COMMENTS

11/6/24

This is a tax invoice from Veterinary Clinic.
Thank you for entrusting us with your pet. We look forward to seeing you next time.
Next appointment: 25-06-2024 11:00:00am

Subtotal: \$3,207.75
Including GST: \$291.60
Total: \$3,207.75
Paid: \$3,207.75
Total discount: -\$423.63
Payment Method: Eftpos/Visa/Mastercard : -3207.75
Due: \$0.00

Owner: [Redacted]
Address: [Redacted]

Patient Name: Charlie
Date: 12-06-2024
Invoice number: 535089

PAYMENT RECEIPT

DESCRIPTION	QTY	TOTAL (incl)
Hospital Fee Dog	1	\$140.00
Nurse Fee	1	\$75.00
Noroclav Injection	0.58	\$31.37
Enrotril Injection	0.58	\$30.62
Temvet 10ml	0.2	\$49.00
Rounding	1	-\$0.04

COMMENTS
Approved for 12.6.24

This is a tax invoice from Veterinary Clinic.
Thank you for entrusting us with your pet. We look forward to seeing you next time.
Next appointment: 25-06-2024 11:00:00am

Subtotal: \$325.95
Including GST: \$29.63
Total: \$325.95
Paid: \$325.95
Total discount: \$0.00
Payment Method: Eftpos/Visa/Mastercard : -\$325.95
Due: \$0.00

Owner: [Redacted]
Address: [Redacted]

Patient Name: Charlie
Date: 13-06-2024
Invoice number: 535090

PAYMENT RECEIPT

DESCRIPTION	QTY	TOTAL (incl)
Hospital Fee Dog	1	\$140.00
Nurse Fee	1	\$75.00
Prevomax Injection	0.58	\$44.38
Meloxicam Injection - 5mg/ml	0.24	\$36.87
Noroclav Injection	0.6	\$31.45
Enrotril Injection	0.6	\$30.68
Heska CBC	1	\$150.00
Temvet 10ml	0.4	\$50.00
Rounding	1	-\$0.03

COMMENTS
Approved for 13.6.24

This is a tax invoice from Veterinary Clinic.
Thank you for entrusting us with your pet. We look forward to seeing you next time.
Next appointment: 25-06-2024 11:00:00am

Subtotal: \$558.35
Including GST: \$50.76
Total: \$558.35
Paid: \$558.35
Total discount: \$0.00
Payment Method: Eftpos/Visa/Mastercard : -558.35
Due: \$0.00

Owner: [Redacted]
Address: [Redacted]

Patient Name: Charlie
Date: 14-06-2024
Invoice number: 535135

PAYMENT RECEIPT

DESCRIPTION	QTY	TOTAL (incl)
Hospital Fee Dog	1	\$140.00
Nurse Fee	1	\$75.00
Noroclav Injection	0.6	\$31.45
Enrotril Injection	0.6	\$30.68
Enrofloxacin 50mg	5	\$36.50
Amoxyclav 250mg	5	\$37.70
Rounding	1	-\$0.03

This is a tax invoice from Veterinary Clinic.
Thank you for entrusting us with your pet. We look forward to seeing you next time.
Next appointment: 25-06-2024 11:00:00am

Subtotal: \$351.30
Including GST: \$31.93
Total: \$351.30
Paid: \$351.30
Total discount: \$0.00
Payment Method: Eftpos/Visa/Mastercard : -\$351.30
Due: \$0.00