**5 Tips for Success**

* Marketing
* Finance
* Strategic Plan
* Human Resources
* Operations



**Marketing**

When developing a marketing plan, an ethical marketing strategy would involve asking some questions:

* What is the outcome wanted for this marketing plan?
* Is there a client behavior that could be changed from an unsafe behavior to a safe behavior?
* Will this marketing plan increase client visits?
* What brand image is being projected by this marketing plan (business brand image and your personal brand image)?
* Are there any deceptive or misleading statements in this marketing plan?
* Is there a fair balance between the needs of the client and the needs of the business?

Write a bio about yourself that you would submit to your new employer for them to post on their client communications or newspaper announcement (how will you ‘market’ yourself).

You will be interviewing at a veterinary practice. How do they market the veterinary practice?? Jot down some items you want to see about the practice – things that are important to you, things that will make you concerned about the practice/culture, and things that will make you want to work for them. Researching how the veterinary practice markets themselves will give you insight into the company and help you decide if the practice is right for you, or if you are right for the practice. Think about what is important to you, and what career path you are interested in following (your goals, strengths, and passions).

Website (e.g. Mission statement, practice history, services they promote)

LinkedIn Page (e.g. connections, job posting, turnover, bios of people you would be working with, culture that they promote, leadership team)

Facebook, Twitter, and/or Google+ Pages (e.g. company culture, services they promote, client relationships)

Google, Better Business Bureau, or other sites for comments (e.g. Online reputation, complaints, reputation in the community) - \*some sites require you to take comments with caution as not all sites are reputable

**Finance**

PATIENT CARE

Performance Review for YOU

For each statement below, circle a rating using this chart as a guide:

4 Excellent Consistently / frequently exceeds requirements

3 Good Consistently meets / Sometimes exceeds requirements

2 Satisfactory Usually meets requirements

1 Needs Improvement Does not regularly meet requirements, below accepted goals

\_\_\_\_\_ Follows our SOPs in performing medical and surgical tasks.

\_\_\_\_\_ Stays current on new developments in medical services and products.

What metrics can help you gauge your level of patient care?

What SOPs does the practice have regarding patient care? Are you familiar with these SOPs? Do you agree with these SOPs? Learn it, Love it, Live it is a phrase that comes to mind. When you are examining a pet, what do you communicate to the client – clearly communicate to the client? Knowing the overall percentage for reminder compliance for the practice is a starting point, being able to focus it down to just your percentage is even better.

Reminder Compliance for the practice is 76%. What ideas do you have for improving client compliance with recommendations?

Inventory sales are 35% of income and services are 50%. What does this signal to you regarding the care being provided to the patients?

Your owner informs you that your numbers are low for Preventive Wellness exams. What are some action steps you can take?

**Finance**

CLIENT SERVICES

Performance Review for YOU

For each statement below, circle a rating using this chart as a guide:

4 Excellent Consistently / frequently exceeds requirements

3 Good Consistently meets / Sometimes exceeds requirements

2 Satisfactory Usually meets requirements

1 Needs Improvement Does not regularly meet requirements, below accepted goals

\_\_\_\_\_ Spends sufficient time with the client.

\_\_\_\_\_ Instills confidence in the clients; is well liked.

\_\_\_\_\_ Charges appropriately for services and time.

What metrics can help you gauge your level of client services?

Your practice contacts clients two days after medical exams to check on the status of the pet. The receptionist also asks a few questions about the visit. The practice manager comes to you to discuss your client satisfaction score of 85% and net promoter scores having a large number of 7’s. What would your discussion entail?

What do you think will garner you 20-25 new clients per month?

The practice posts a quarterly report of the top 50 producing clients (those who spent the most money) and the top 50 referring clients. Your practice owner tells you that you do not have any clients listed on the top 50 producers and wants to see a change for the next quarter. What self-audit would you undertake regarding this information?

**Finance**

BUSINESS SUCCESS

Performance Review for YOU

For each statement below, circle a rating using this chart as a guide:

4 Excellent Consistently / frequently exceeds requirements

3 Good Consistently meets / Sometimes exceeds requirements

2 Satisfactory Usually meets requirements

1 Needs Improvement Does not regularly meet requirements, below accepted goals

\_\_\_\_\_ Seeks ways to improve hospital operations. Presents suggestions for improvement.

\_\_\_\_\_ Works efficiently and demonstrates appropriate utilization of team.

\_\_\_\_\_ Cognizant of expense of medical equipment and supplies, demonstrates care in the use of equipment and supplies.

What metrics can help you gauge your level of involvement with practice success?

The practice’s Lab profit center metric is a dismal 10%. How can you, as the new grad in the practice, help the practice identify issues and make corrections?

You notice that the practice schedules 3 techs for your shift. Although it is wonderful to have this level of help, what metrics would you want to monitor?

Your practice carries numerous brands and types of pet food. You notice that the one associate always walks clients to the food area and the clients end up purchasing a bag. What would you want to ask this associate? Would it make you change the way you felt about diets in your medical recommendations?

**Finance**

PERSONAL SUCCESS

Performance Review for YOU

For each statement below, circle a rating using this chart as a guide:

4 Excellent Consistently / frequently exceeds requirements

3 Good Consistently meets / Sometimes exceeds requirements

2 Satisfactory Usually meets requirements

1 Needs Improvement Does not regularly meet requirements, below accepted goals

\_\_\_\_\_

What metrics can help you succeed?

What other performance review questions would you like to be asked regarding your personal growth and success as an associate?

**Strategic Plan**

**SWOT**

Internal analysis of Strengths and Weaknesses

1. Sales - Marketing, Promotions

2. Service -, quality of services, competitiveness of services

3. Finances - our costs, efficiency of expenses/revenue, measurements of expenses/revenue

4. Operations & Processes - efficiency, structure

5. Management - systems in place, structure, expertise

6. Legal & Ethic considerations

External analysis of Threats and Opportunities (Porter's)

1. Veterinary Industry

2. Competition

3. Political

4. Environmental

5. Social/Demographics

6. Technology

7. Economics

8. Legal

**Strategic Plan**

**Time Management**

Stephen Covey’s Time Matrix

 Urgent Not Urgent

|  |  |
| --- | --- |
| * Pressing Matters
* Crises/ Panics
* Fire- Fighting
* Deadline-Driven Projects
 | * Prevention
* Relationship Building
* Planning/Preparation
* Implementing
* Professional Knowledge
 |
| * Interrupts
* Some Mail/ Calls
* Some Reports/ Meetings
* Unprepared Meetings
* Popular Activities
 | * Trivia
* Busy Work
* Time Wasters
* Unproductive-Activity
* Everything Else
 |

Important

Not

Important

**Susceptibility to Stress Related Illnesses**

100 Death of Spouse/Partner 30 Foreclosure of mortgage or loan

 73 Divorce 29 Change in work responsibilities

 65 Marital Separation 29 Trouble with in-laws

 63 Jail Term 28 Outstanding achievement

 63 Death of close family member 26 Spouse changes work

 53 Personal injury or illness 26 Start or finish school

 50 Marriage 25 Change in living conditions

 47 Fired from work 24 Change personal habits

 45 Marital reconciliation 23 Trouble with the boss

 45 Retirement 20 Change work hours

 44 Change in family member’s health 20 Change residence

 40 Pregnancy 20 Change in schools

 39 Sexual difficulties 19 Change in church activities

 39 Addition to family 18 Change in social activities

 39 Business readjustment 17 Mortgage or loan under $20K

 38 Change in financial status 16 Change in sleeping habits

 37 Death of close friend 15 Change in family gatherings

 36 Change to a different line of work 15 Change in eating habits

 35 Change in number of marital arguments 13 Vacation

 31 Mortgage or loan over $30,000 11 Minor violation of the law

\_\_\_\_\_\_ Your TOTAL Score

0-149 Low susceptibility to stress related illnesses

150-299 Medium susceptibility – learn and practice stress management skills and healthy life style

300 + High susceptibility – daily relaxation skills, address now before a serious illness erupts

**Human Resources**

**Drama and the Boss – How to Deal with Toxic Bosses**

**Plays Favorites** (encourages reporting on others, ignores certain team members, does not recognize or motivate others)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

**Fail to Plan or Fail to Communicate** (does not offer any guidance, leaves you in the dark, can’t make a decision)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

**Bully**

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

**Inconsistent (**breaks promises, hypocrite, breaks rules they set up)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

**Human Resources**

**Passive-Aggressive** (avoids conflict, silent yet hostile, antagonistic, covertly undermines others)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

**Micromanage** (gets involved in every task, every person, every time)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

**Drama and the Team**

**Drama Queen** (thrives on excitement, attention, plays the victim)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

(Set boundaries, explain acceptable performance, meet to discuss behavior & work)

**Queen Bee** (plays office politics, uses knowledge and power, bully)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

(How can you display confidence, confront or ignore, ask questions, don’t confront)

**Human Resources**

**Complainer** (griping, chronic malcontent, whining)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

(Review your own actions, private chat, investigate complaint, be a sounding board)

**Cynic** (pessimistic, uncooperative, negative)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

(Demonstrate you value their opinion and ask what they would do)

**Passive-Aggressive** (submissive, avoids conflict, silent yet hostile, antagonistic)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

(Talk about their behavior, set goals, expectations and accountability)

**Gossiper** (snide remarks, hostile)

Situation:

Awareness: (What is the trigger?)

Questions to ask: (“What do you want to happen?”)

Action you will take:

(Improve workplace communication, educate team about gossiping, have a discussion with the source, team –building activities)

**Operations**

**On The Job Training Secrets for Employee Success**

Strategic Goal of the Practice requiring Employee development:

Employee identified for development to implement or participate in this strategic goal:

Identify competencies needed for the job

Decide what numbers to watch and how to document

List what changes you expect to see after the training

Know how the business will be affected by the change

|  |  |
| --- | --- |
| ID needs, clarify focus |  |
| ID how to evaluate success |  |
| ID expectations, what will change |  |
| ID impact on business |  |

|  |  |
| --- | --- |
| KPIs (numbers, metrics) |  |
| Personnel (who needs trained on this initiative) |  |
| Process (what they need to perform, the process necessary) |  |
| Resources (assets currently in use, manuals, SOPs, etc) |  |
| Training & Tools (additional tools needed for training, how training will occur) |  |
| Expenses (cost of resources, tools, wages, training time) |  |



**Strengths:** what we do well

**Weaknesses:** what we do poorly, what could be improved, what we should avoid doing

**Opportunities:** areas we could expand into, what clients what from us, what competitors do not offer

**Threats:** obstacles

**4 Questions to ask the team** ( from [www.ExecLeadership.com](http://www.ExecLeadership.com))

1. What is the point of this activity? (clarify the larger purpose, expose time-wasting activity)
2. What is the third option? (avoids the either/or, this/that and encourages outside the box ideas)
3. What happens if our assumptions are wrong? (workable ideas if certain conditions occur)
4. How much is enough? (when it is time to call it quits on that activity or idea)

**6 Questions to identify the problem (from** [**www.ExecLeadership.com**](http://www.ExecLeadership.com)**)**

1. Is X important?
2. If so, how well should we be doing with X?
3. How well are we doing with it?
4. If we are not doing well, how can we improve?
5. What is stopping us?
6. How do we blast through the obstacles that are stopping us?

**Results of SWOT = Top 5 items of high priority:**

 1)

 2)

 3)

 4)

 5)

Are these top 5 Goals for our practice for 2014, 2015…any next 3 years?

 Will they improve medical service provided to our patients?

Will client service and the client experience in our hospital be improved?

Will the team feel engaged and actively promote our practice?

 Will they give our practice the competitive advantage?

**Strategy Formulation Template**

***the Game Plan for Goal the Priority Goals (use this format to organize the “game plan” for implementing each goal)***

Priority goal #\_\_\_ Title/goal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Objective (based on our needs assessment and goal):

Limits or constraints (factors affecting this goal):

The design (what has to be done & how to do it):

 1. Strategy

 2. People

 3. Other specifics

 4. Finances

 5. Time Frame

Evaluation / Metrics