

Practice Management Session

Moderators: Brian Reed, David Welch

Scheduling: A bit like herding cats

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Abstract

As veterinarians, we enjoy the days when our schedule works as we have planned. Unfortunately, due to the innate nature of our profession, the best made plans often get disrupted. Scheduling can often be a bit like herding cats: a futile attempt to control the uncontrollable. However, there are several keys that can help bring order and organization to the day to ensure the animals are cared for, and the clients are staff all remain happy. Communication, Calendars and Technology are all ways in which our practice tries to ensure the above is true. The most important key is by far communication. Using calendars and technology are ways in which communication is augmented. To become indispensable to our clients and our staff, we all need to be on the same page.

Key words: veterinary, practice management

Résumé

En tant que vétérinaires, nous apprécions les journées où notre horaire fonctionne comme prévu. Néanmoins, en raison de la nature même de notre profession, les meilleurs plans sont souvent perturbés. La planification s'assimile souvent au rassemblement de chats, un exercice futile à contrôler ce qui n'est pas contrôlable. Toutefois, il y a plusieurs moyens qui peuvent aider à maintenir l'ordre et l'organisation dans la journée pour s'assurer que les animaux reçoivent les bons soins et que les clients et le personnel restent heureux. La communication, les calendriers et la technologie sont tous des moyens utilisés dans nos pratiques pour s'en assurer. La communication est de loin le moyen le plus important. L'utilisation de calendriers et de technologie est là pour faciliter la communication. Afin de devenir indispensable auprès de nos clients et de notre personnel, nous avons tous le devoir d'être sur la même longueur d'onde.

It's Monday morning, 7:25 am, and my business partner and I have been meeting with a consultant. I have to leave by 7:30 to get to my first herd check early, so I can make it to herd check #2 early, so we are done herd checking in time for our monthly management team meeting. Our receptionist comes in to tell us "Keith's cow" has a prolapse. I look at my business partner, knowing she doesn't have herd check until 10; "Can you go?" Nope. She has to take her son to the doctors at 8 am.

The other full-time associate is already headed towards her herd check and the part-time associate has the day off. The prolapse is "on my way" to herd check #1. I guess I'm tagged IT. Hopefully, it's a fresh one, the cow is cooperative, and I just lose the 20 minutes I'd hoped to gain by heading to herd check #1 early. Oh, and sorry Mr. Consultant, thanks for stopping by!

Sound like a typical Monday morning? I had my day planned. Timing was going to be everything today to make my schedule work. That's the beauty of a group practice- there's always someone to cover or take the calls. But, sometimes that *someone* is you!

The theme of this year's conference is "Becoming Indispensable." Within the VPS sessions, the goal is to make your practice indispensable for your clients and your staff. In this case - scheduling clients and staff so that the practice is indispensable.

One of the most important places to start is knowing the goals and vision of the practice. Is this a practice that is solely focused on profit: the more we can get done in a day, the better off we are? Is this a practice that is focused on customer service: regardless of time of day, weekday or weekend, morning or night, we cater to the call? Is this a practice focused on work/life balance to the point we don't really care that Farmer Joe just found a cow that doesn't look so good, it's 4:00 pm but it can wait until tomorrow? Maybe the practice is a combination of all 3. Regardless of which type of practice it is, clarity from the owners on that focus needs to be clearly communicated to all employees.

Next - who are the staff? Are there high-school kids that have other extracurricular activities, homework and family obligations they are committed to? Are there single parents that need to make sure someone is home to get the child off the bus at 3:30 pm? What about those parents that have kids in daycare, but they still need to be picked up by 5:00 at the latest? What about the single veterinarian that has no family obligations, just moved to a new area with no friends, and knows they have to pay for themselves in the first couple years? Each employee has a unique situation that needs to be considered when trying to schedule.

Thirdly, it is important to know the clients. Is this a mixed animal practice with small animal appointments into the evening? Large animal only? Battenkill Veterinary Bovine is a clinic that services cattle, sheep and goats. Even though we are a ruminant only clinic, the clientele we service varies greatly. We have large farms where every cow is on an OvSynch Protocol, the crop guys do their thing and the cow

guys do theirs. The parlor runs 21 hours a day and herd checks must work around that schedule. Then there are those that milk 100 cows twice a day. The owner is the herdsman, the mechanic, the feeder and still must get the field work done. Finally, we have clients that are what we call “hobby” farmers. These are the people that have a couple sheep/goats or cows in the backyard, have a 9 to 5 job in town and only are available after our “normal” business hours.

The final thing to consider is the inherent nature of our job. If I could schedule the twisted uterus to happen after my herd check, the prolapse to happen an hour before 1 of the other veterinarians’ herd check, and the calf that jumped through the cage around its hutch and filleted its leg open, for when I was driving by the farm that afternoon, that would be great. But, I’m a large- animal veterinarian, and every day is a surprise.

As the title of my talk illustrates, trying to schedule around all these intricacies, situations, and goals is about as easy as herding cats. It is a futile attempt to control the uncontrollable. However, there are things we can do as owners, office managers as well as staff, to help at least mitigate the craziness.

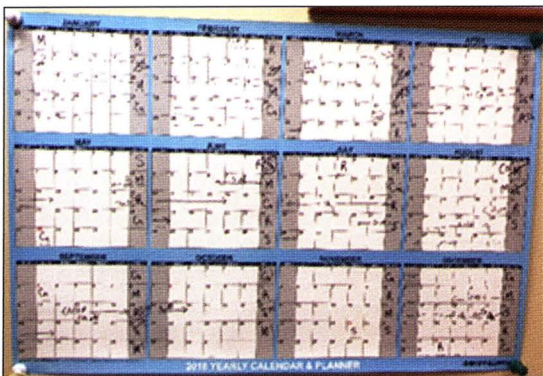
I will not admit to having this all figured out. However, to help mitigate the uncontrollable, there are a few key things that must be in place.

Communication!!!!

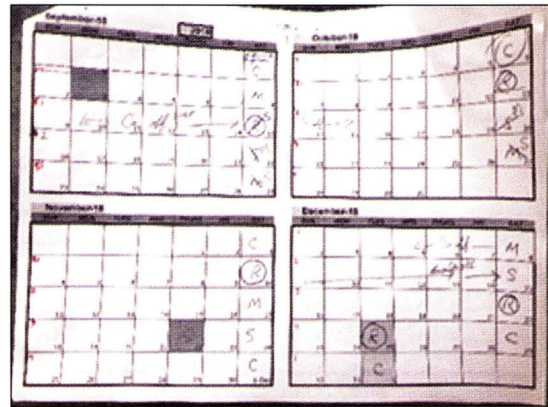
This is 1 area that every practice, of every type and every size, must continually work on. The days that are frustrating for the office staff and the other doctors are the days where there was a communication breakdown. When we continue to remind ourselves and our staff to work on effectively communicating, days run easier, employees are happier, and clients are served in a timely and satisfactory manner.

Calendars

We have 4 different calendars. There is a large 12-month calendar in our conference room where we have all doctor vacations, time off, and the weekend/holiday on-call schedule posted. This is a nice easy way for us to see the year at a time



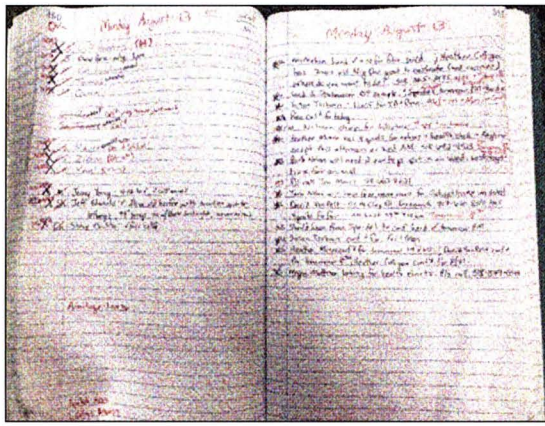
when we are having our weekly doctor meetings or monthly staff meetings. There is also a small quarterly calendar (8.5” x 11”) next to our weekly schedule that shows the next few months at a time. If on-calls need to be switched, changes are made on this schedule so that our receptionist making the weekly schedules is aware of the schedule changes. This is a second spot where vacation time is written, as this is seen in the reception area and is readily visible to all employees at any point during the day.



Our weekly schedule is a large bulletin board that sits right in front of the receptionist. Each page is a day with each doctor listed with their respective herd checks. When a doctor is occupied at a herd check, their line is shaded gray for easy visual identification that the doctor is booked. Open white space on the board indicates doctor availability that can be used by the receptionists to schedule additional calls.



Finally, is our daily call book. This is a large record book which on the left side has the doctors listed with their herd checks and is the place where any additional sick cow calls or emergencies that come in are listed. The right side of the book lists any messages that need to be relayed to a specific doctor or to a group of doctors. Phone numbers for clients that need a call back and other important messages are relayed here. At the end of the day, the receptionists take a picture of the book and send it out in a group text so that if we are still out on the road, or there are phone numbers that we may need, we have them readily available and we all know what went on for the day as well as what is on the book for tomorrow.



Communication!!!!

As mentioned earlier, we have weekly doctor meetings and monthly staff meetings. Being a solely mobile veterinary practice, doctors can go days without seeing each other as we tend to our own herd checks and handle sick cow calls coming in. A tradition that started long before my time was a Monday Morning meeting that happens at 6:45am. The earliest herd check starts at 8am on Mondays, so this gives doctors 45 minutes to discuss on-call swaps, cases, clients and clinic issues before we all must leave for herd check.

As our 2 receptionists do not arrive at work until we are all about to leave, we have recently implemented a monthly staff meeting. Previously, owners would relay important information discussed during Monday morning meetings to the office staff. However, this was still another area of communication breakdown. It was evident we needed to have ALL employees in the room at the same time to discuss various things beyond medical cases and on-call swaps. Because we are a mobile veterinary group, finding time to get everyone back to the clinic in the afternoon can be difficult. However, we have tried to pick routinely slower days and days where those with children have later child care available.

One of the greatest challenges we have is training our clients to call the office. Many of my herd check clients have my cell phone number. As veterinarians we tend to build relationships with these clients and them having a way to contact us seems like good customer service. This is okay if they are contacting us with a question or an issue they would like to discuss when we are both available to talk. Having this open line of communication becomes an issue when they are using it to schedule calls or tell you they have a cow that needs to be seen. It has happened on more than one occasion where a client has called or texted me to tell me they have a calving, a prolapse or a DA that needs to be taken care of today, and I'm over an hour away on another call and won't be back near them for a few hours. Training clients to call the office is critical to ensuring customer service. I may not be able to get there right away, but another doctor may.

Just as our daily call book is our central hub of the day—so are the receptionists that are operating that daily call book.

Police, rescue, and firefighters all use a dispatch service to orchestrate their calls. A receptionist has a similar responsibility in our industry. When doctors schedule their own calls, or a client is contacting a doctor directly instead of calling the office, there is a much higher likelihood of failure to communicate that information to the receptionists. Say an emergency or sick cow call comes in and the receptionist thinks there is a doctor available based on her knowledge and looking at the schedule, but actually the doctor has booked themselves and are not available for the call. Now the office staff is frustrated, the doctor is frustrated, and we have compromised customer service. I've been guilty of a client texting me on a Sunday afternoon asking for me to come out to the farm on Monday, and I forget about the call until about mid-day Monday. If the client had just called the office, the risk of forgetting is eliminated, I can remain efficient in planning my route for the day and the office knows to look for an invoice! It's a challenge to operate as a team when we are all scheduling our own things without that central hub. Just like a gear box needs a central axis to run smoothly, so does an office of veterinarians. Our receptionists and our daily call book are that axis.

Again, communication is key. To be "indispensable" to our clients and staff, the entire staff needs to be on the same page.

Technology

I have seen and heard of various clinics, some much larger and some much smaller than ours, that use Google Calendar or other types of technology that syncs between all doctors and the office. As this is more "real time" than our call book, we have not yet moved to this type of schedule. However, we do use group texts regularly as a way of communicating. Hopefully with time, using synced calendars will make scheduling personal and work-related activities easier. We already use color coordination with on-calls and invoicing. Much of what we are doing, there is already technology to do for us. We just haven't made that jump yet.

Communication!!!!!!

Obviously, this can't be emphasized enough. Every single one of us has a life outside of work. Sometimes the personal things take precedent and are a necessary part of scheduling work around. Often, the same is true in reverse. Clear and regular communication between all employees and owners is a must. At Battenkill we pride ourselves on customer service and a work/life balance. The only way to make that work effectively is to ensure that we are all on the same page. Policies about time off to ensure enough doctors are available to take care of clients, flexibility with time off to ensure personal satisfaction in the workplace, and communication to ensure both of the above occur is a constant challenge but a necessity to make a clinic indispensable to the clients and the staff.