



Change management for equine and large animal practitioners

One thing that the COVID-19 pandemic has taught equine and large animal practitioners is that they can handle change quickly and efficiently. In fact, it probably was easier to initiate changes regarding how in-clinic patients (and their owners) were scheduled and handled, changes in procedures for farm calls, and even how billing was handled because all the staff and clients were on the same page in dealing with the pandemic.

For example, some veterinary practices that previously had barely heard of the word “telemedicine” soon found themselves becoming experts in phone, photo and video conferencing with clients about patient health and care.

The COVID-19 pandemic has shown veterinarians that they can handle change, even when it is unexpected.

By Kimberly S. Brown, EquiManagement

The world is gradually returning to the “new normal.” Now is the perfect time to look at maintaining or instituting changes in your practice that can help your business not only survive, but thrive in the “new” world. You can take advantage of the “pulling together” of your staff and clients during the pandemic to institute other changes that you have wanted to make in your practice, but for which the timing never seemed right.

But while doing this, be careful of staff “change fatigue” that happens when too many things change at once, especially if they aren’t well-planned and properly executed.

Understanding change

Creating a road map for your practice is important if you are to successfully institute and manage the changes you want to make. That means you need to know and communicate to your staff and/or clients:

- what the change is;
- why it is needed;
- how it benefits the individual (WIIFM or “what’s in it for me?”);
- how it will take place (gradually, on a date, or immediately); and
- what success looks like.

What the change is.

You need to have a clear vision of the change that you want to make. If that change is tied into—or an extension of—something you did during COVID-19, then that is even better!

You probably have been taking lots of credit card payments over the phone during COVID-19. Your staff is now used to handling this type of billing. Your team has learned how to input credit (or debit) card charges when they don’t have the card in hand. Your clients know that they have been billed accurately and their credit card numbers are safe with your team.

Your clients probably have been doing more online purchasing, and they have probably saved credit cards to their favorite shopping sites to make billing and checking out quicker and easier.

You have wanted to have a credit card on file for every client in order to ensure quick and easy payments at time of service rather than waiting and sending out one bill at the end of each month, then waiting for payment.

However, to do this safely and securely, you need to ensure that your practice management’s billing system is secure and that invoices and receipts are accurate and generated in a timely manner.

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More on Change Management

There are several types of changes that occur as planned (i.e., sale of a practice) or unplanned (i.e., COVID-19 pandemic) events.

How do you recognize the need for change in your practice? According to the download from Covetrus (and the resources cited by that company), signs of your practice needing change include:

- high staff turnover;
- loss of clients; and
- drop in profitability.

You also might recognize a need for change in your practice if your clients are asking for services that you don't provide. That can range from an online pharmacy to digital radiography to complimentary therapies to telemedicine.

Why it is needed.

In keeping with the idea that you want every client to have a credit card on file to use for payments, you need to have internal and external conversations.

Internally, you need to communicate to your staff why inputting and using on-file credit cards for payments helps your practice maintain a positive cash flow. Primarily, it means that your business is more secure and your practice bills (including staff salaries) can be paid on time. Office staff members need to know the process. They need to have talking points to help clients convert to the new "card on file" system of billing. And they need to know about the alternatives if someone does not have a credit card.

The bottom line is that you need to ensure that everyone in the practice—from veterinarians to technicians to the front desk staff—know what the policy is, why it is being put in place, and how billing will be handled with or without a credit card.

Externally, you need to let your clients know what the "card on file" policy is, why it is better for clients and the practice, and how they can pay if they don't have a credit card. This might mean sending out a text, email, card, newsletter or whatever you use to communicate with your clients. They also need to know what the penalty is if payment isn't made at time of service.

Client "What's in it for me?"

As noted before, clients need to know how this new policy will benefit them. Receiving payments at time of service ensures that the veterinary practice that they love can stay in business and continue to serve them. It also ensures that those who aren't paying in a timely manner are not causing problems and price increases for clients who do pay on time.

Having a card on file also allows easier transactions for farm calls so that veterinarians and clients don't have to try to run payments when they perhaps have no cell or internet service available.

How it will take place.

It is critical to make sure your staff and clients know the deadline for all clients to have a credit card on file (or to have made other payment arrangements). Again, this requires good communication with your staff and especially your clients.

Your staff needs a way to track who has and has not placed a card on file for billing. This is where your practice management software comes into play.

Staff members need to remind every client with whom they speak about the new policy—whether that client is making an appointment or a staff member is answering a question. The client's file in your practice management software should have that information easily available to your staff.

Also, plan a campaign of texts, emails, post cards, newsletter content and in-person communication from the veterinarians and staff to all clients. This will take some coordination with your office staff. You might also need to have some training for your veterinarians and vet techs who don't like to talk about financial matters with clients.

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Covetrus created a downloadable PDF that can help you understand change and the processes and pitfalls that come with it in the veterinary industry.

“Navigating What’s Next: How to Manage Change in your Veterinary Practice” can be downloaded for free at:

<https://get.covetrus.com/change-management-equine>

What success looks like.

This is a financial decision. If you are not getting paid at the time of service, what is it costing you to “carry” that person’s charges for 30-90 days? You have paid for the drugs and products that you use during a treatment or exam. You have provided the service needed by the client. Recouping those costs quickly is better for your business. You don’t walk out of a doctor’s or dentist’s office without paying.

Make sure you understand your costs—including overhead, inventory and staff time—and where profits and losses occur in your business. It might be surprising to see how much that vial of vaccine or that bandage material costs you to purchase, store, administer then be paid for over time.

Let’s face it, not all of your clients will put a card on file if you set just one deadline. That will feel like a failure to you and your staff. Perhaps your goals should be tiered. Maybe you determine that you want 25% of clients to have a card on file in the first 30 days of this change. Then you want 50% to have one on file in 60 days. Then you want to have 75% of clients have a card on file by 90 days.

Will you have 25% of your clients either refuse to put a card on file or require some other type of billing settlement? That depends on your practice, your client base and how much of a priority this new policy is for your practice. Might you lose a client or two over this policy? Yes, you could, especially if you don’t have alternatives to the business rule of payment is due at time of service.

Take-Home Message

Change is hard. An article in the Harvard Business Review noted that studies have shown that in most organizations, two out of three transformation initiatives fail.

In order to avoid change failure, you need to address the “soft” and “hard” elements for any change. Soft elements include leadership, culture of the business and motivation for the staff and clients (if applicable). Hard elements include setting measurable benchmarks and goals, communicating the importance of the change internally and externally, setting a deadline for the change and accomplishing the change within that timeframe.

Veterinary practices depend on their people to be successful; this means from the top down.

You can have the best treating veterinarian in the area, but if your staff doesn’t schedule calls to make the most of the vet’s time, doesn’t treat clients with respect, doesn’t send out bills on time, and/or doesn’t manage inventory properly, you won’t succeed as a business. Are there changes that need to take place to address those problems in your business?

Conversely, if your practice has a top-notch staff, but the head veterinarian is resistant to changes that would make the workplace better and more efficient, then employee engagement in the practice will dwindle over time. This practice will lose the most dedicated and talented staff, and the failure to change to meet staff (and client) needs will result in a failed (or less successful) business.

The good news is that if you have wanted to change something in your practice, now is the time!

The world has changed in terms of how we all interact, and that can be a great jumping-off point for you to make some needed changes in your veterinary practice.

Source: <https://get.covetrus.com/change-management-equine>