Leverage the Talent of Your Team

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This paper outlines how to identify factors that may contribute to inefficiency, what systems need to be improved, and how to increase employee productivity. Author's address: ALD Veterinary Consulting, LLC, 712 Meadowcroft Lane, Nolensville, TN 37135; e-mail: adonnelly@aldvet.com. © 2021 AAEP.

1. Introduction
Team development is unquestionably one of the greatest challenges for most veterinary practice leaders. This includes how to effectively onboard employees and build an efficient, productive team. Another frustration occurs if practice leaders promote seemingly talented employees to supervisory roles only to find they don’t excel in their new job roles. One of the keys to addressing these challenges is to determine whether the practice has a systems problem vs. a people problem or both. For the practice to run smoothly, the business must have systems in place that enhance efficiency and productivity. Likewise, the business needs to have well-trained, engaged team members who desire to contribute to the success of the organization.

2. Practice Assessment
Before deciding on solutions to implement to increase team development and efficiency, it’s essential to first assess possible underlying causes of any problems. Practice leaders can begin by looking for signs of inefficiency in daily operations. One way to do this is to think of daily challenges or slowdowns in workflow that occur on a regular basis. For example, are there problems with scheduling? Are team members consistently trying to locate missing paperwork, charts, or equipment? Do managers or doctors find they are constantly interrupted by team members asking for direction? It’s also helpful to track and evaluate any inefficiencies to determine the significance of the problem. For example, if scheduling truly is a problem, this may be reflected in a decline in the number of farm calls each month. Likewise, to track the inefficiency associated with employee interruptions, doctors can track whether this slows down their productivity on a regular basis or whether it only occurs for a short time with new hires. Once the signs of inefficiency are identified, consider factors that may be causing the problem. Staff shortages, for example, are definitely a major problem for many practices. But other causes for inefficiencies include unclear or inconsistent protocols, problems with scheduling, and disorganized team members. Likewise, poorly defined job roles and a lack of training can cause slowdowns in workflow. When thinking about the causes of inefficiency, look at whether one or more team members are involved. If multiple employees demonstrate a lack of accountability or inefficiency, the problem is most likely a systems problem. On the other hand, if one or two team members keep...
making the same mistake or demonstrate inferior job performance, this indicates a people problem. When assessing efficiency, it’s also wise to evaluate key performance indicators (KPIs) to see how the practice is performing. Look at the revenues and doctor transactions, for example, to see if they are consistent or higher than previous quarters or years. The KPIs can indicate if there is a problem with business performance, how much growth has occurred, and whether the perception of inefficiency is related to the stress and possibly burnout of team members. If the number of transactions hasn’t increased but the team is unhappy and complaining about inefficiencies, then the problem may be staff shortages or decreased employee well-being. On the other hand, if transactions have increased significantly, then inefficiencies might be related to a lack of training for new hires and lack of clarity on protocols.

3. Identifying Processes to Improve Operational Efficiency
The practice assessment is likely to uncover one or more of the following common systems problems. Taking action to improve these processes will result in a business that runs more smoothly even when the practice manager and owner aren’t present.

Define Clear Protocols
When contemplating the practice’s operational protocols, think about whether any protocols are missing or lack clarity as well as whether they are documented in writing. Often protocols are well known by experienced team members but may not be clear to those with less experience or new hires. When protocols are written, it makes training much easier and helps to increase employee accountability. To develop written protocols, ideally practice leaders should include the entire team. Team members who are involved in providing services or completing job duties are the ones best suited to determine if protocols are missing and whether they are clear. The team can create a list of protocols that need to be drafted or updated. Putting protocols in writing can be a daunting task, so it makes sense to prioritize the list of necessary protocols. Focus first on those that are most important for patient care and daily operations. For example, a protocol for how to complete a routine procedure or frequent client communications would take precedence over one for how to complete a job task that is only done occasionally. To make progress, practices should set a goal to complete the protocols according to a specified timeline. Many protocols can be drafted using bullet points and are no longer than one page. In this case, it may be possible to draft at least one protocol every one to two weeks.

Implement Standard Operating Procedures
Often practices have team members that complete work in many different ways. Likewise, it’s not uncommon to have different doctors with different standards or ways of doing procedures. Within reason, practices should determine the most appropriate, efficient way to complete routine procedures, treatments and surgeries. Not only does this help increase efficiency, it helps eliminate confusion and makes training more effective when onboarding employees.

Organize Workflow
Practices should establish specific organization procedures for all areas of the business as this can help employees be more productive and save time. For example, making sure charts, check-in sheets, lab results, or travel sheets have a designated home helps with efficiency, so people don’t waste time trying to find paperwork. Likewise, stocking rooms and trucks with all the necessary supplies and equipment means team members don’t have to waste time trying to find something. Remember that implementing multiple action steps to organize workflow can add up to significant improvements in operational efficiency.

Clearly Define Job Roles
Completing certain job tasks and fulfilling job duties often falls to multiple team members in the same department. Unfortunately, if job roles and expectations aren’t well-defined, employees may claim “I didn’t know it was my job” or say “I thought Bob was going to do it.” And even when team members are committed to doing an excellent job, there may be confusion about job responsibilities and job expectations if they aren’t clearly defined.

Leveraging the Use of Technology
It’s always wise to determine if technology solutions can help increase operational efficiency. This may include having clients fill out new client information forms or the patient’s history online prior to coming in which saves time at the beginning of appointments. Leveraging the use of technology includes having prepared treatment plans for all common medical procedures, treatments, and surgeries so team members don’t have to generate a new treatment plan for every client. Managers can link service codes in the practice management software for those services that are typically done together when creating treatment plans. It also helps save time to reduce the number of computer codes for services, so employees don’t have to stop and ask a co-worker or the doctor which code to use.

4. Improving Team Productivity
Even practices with effective systems can experience challenges with team development. Aside from having insufficient staff, the following people
problems can cause inefficiency and a lack of team productivity:

- Lack of trained and/or skilled team members
- Lack of accountability
- Employee conflict, drama, and problem behaviors
- Lack of employee empowerment
- Lack of motivation and self-leadership

The first step to creating a productive team is to make sure the business sets employees up for success with excellent orientation and onboarding systems.

Improving Orientation and Onboarding

Employee orientation includes all the activities involved with helping integrate new hires into the organization. Unfortunately, orientation is often ineffective in many practices because it’s essentially non-existent or too short. Simply telling employees how to clock in and giving them the employee manual and details about their schedule is not orientation. A half-day of direction is also not sufficient. Orientation shouldn’t be rushed as this critical time period can make or break whether a new hire turns out to be an excellent addition to the team. To implement an orientation process that leads to enhanced retention, consider that the entire 90-day introductory period for a new employee is their orientation period. This doesn’t mean they won’t undergo training during this time, but this paradigm helps to ensure practice leaders recognize the need to pay attention to employees during their first few months. Using a detailed checklist is a good way to outline all the activities that should occur during orientation. It can include items such as completing relevant new hire paperwork, learning about employee benefits, reviewing job duties and expectations, and learning practice protocols. The checklist should also include a schedule for training sessions and when supervisors or managers will complete reviews of job performance. Another often overlooked part of orientation is to include a meeting for new hires to learn about the practice history, mission, vision, core values, and culture. This helps new team members gain an understanding of what it means to work at the practice and how they fit in. Employee onboarding is the process for new employees to gain the requisite knowledge, skills, and proficiencies to be able to do their job competently and contribute to the success of the business. The length of time for onboarding is variable, but most businesses consider the first 6-12 months to be the onboarding period. As with orientation, managers can improve onboarding by using a checklist to track the progress of learning for new hires. Effective onboarding includes the need to develop and implement comprehensive training programs. Given the scope of this project, it’s best to enlist the participation of multiple team members who can be part of a training team for the business.

Employee Training and Development

Essentially, employee development is all the efforts to assist in the professional growth and learning for team members. To determine whether the practice has an effective employee developmental program in place, consider the answers to the following questions:

- Does the business have a formal training program for new hires?
- Is there a plan to provide ongoing training to all employees?
- Does the practice utilize multiple resources to provide training for employees?
- Do training programs have supporting tools and materials?
- Do employees meet regularly with managers to discuss their training needs?
- Are employees encouraged to develop new skills?
- Does the practice have a training budget?
- Are employees empowered to utilize their skills?
- Does every employee have a written developmental plan reviewed with managers quarterly or bi-annually?

Each employee should have a written development plan that outlines their goals and action steps to achieve the goals. The action steps need to be specific and include a timeline. Bear in mind that it is far better to establish a reasonable number of goals each year rather than try to do too much given the busy work schedules of most employees. Managers should meet with employees at least quarterly to discuss their progress.

Developing Managers

All too often, employees are promoted into supervisory or management positions, but they don’t excel in their new roles. In part this may be because the team member is not suited for the leadership position. However, the problem is often related to a lack of training and leadership coaching that is necessary for the employee to understand how to be successful completing their new job duties. Before promoting employees, the practice manager or owner should meet with them to discuss the job expectations and duties that go along with the new position. For example, will the new position require working different hours or being available after-hours? Perhaps the new position will require attendance at leadership meetings or continuing education seminars. Often job duties for middle managers include being involved in supervising their co-workers and the employee review process. It’s important to make sure new managers understand these new responsibilities. A
development plan should be put in place for managers who are promoted so they can learn and grow. The plan needs to outline specific action steps for the team member to gain knowledge and skills they need to be a successful manager. This may include taking advantage of resources such as books, articles, webinars, and professional meetings. New managers also need to receive ongoing guidance and feedback as they assume their new job role. Most people need coaching in areas such as communication skills, being a role model, and giving co-workers feedback. The practice needs to identify who will serve as a mentor or coach for the manager. This could be the practice owner, an associate veterinarian, the practice manager, another manager, or an outside consultant.

Enhancing Employee Empowerment and Problem-Solving

One of the biggest drains on practice efficiency occurs when team members have to seek out supervisors for assistance or approval before taking action. Consider the following examples of how efficiency and teamwork suffer because employees aren’t trained or empowered to be problem-solvers.

- Client service representatives who must check with the practice manager before making a minor adjustment to an invoice.
- Team members who must check with the practice manager about payment options for the client.
- An owner or trainer who waits while staff check to seek approval for them to drop off a patient outside the normally scheduled times.
- Technicians wait to proceed with procedures to see in what order the doctor wants them done.
- The inventory manager can’t complete the drug order because they have to check with the doctor about a substitution; this slows the order and necessitates more phone calls.

If any of these scenarios sound familiar, then practice leaders should take advantage of the opportunity to increase employee empowerment and the problem-solving capabilities of their team. Not only does increasing employee empowerment increase efficiency, it is a well proven strategy to increase engagement. When team members are highly engaged, they have greater job satisfaction and contribute more to the success of the business. To empower employees, practice leaders should begin by making sure job expectations are clear and team members know their boundaries related to what action they can take. Let’s look at the example of a disgruntled client who isn’t happy with their bill. Perhaps they feel they weren’t properly informed about the cost of a service. A fully empowered team member is one who knows to provide the highest possible service and what actions they can take to enhance client satisfaction. This includes knowing the boundaries for how much (if any) they can adjust a bill and whether there are other actions they can take to help the client. Another way to increase empowerment is to encourage employees to offer ideas and possible solutions for how they think a problem should be handled rather than just asking how they should proceed. In time, employees will learn to present possible solutions to problems and feel comfortable making decisions on their own about minor variations in daily operations. Excellent questions to ask team members to encourage problem-solving include the following:

- “What have you done so far to solve this problem?”
- “How do you think we can resolve this issue?”
- “What ideas do you have to address this situation?”

5. Conclusion

With proper training and coaching, employees can be more efficient and effective in their jobs. Team members that can quickly respond to a variety of situations and client demands are invaluable since every time an employee has to seek out a manager or veterinarian to make a decision, efficiency suffers. With increases in efficiency, practice productivity increases as well. Efficient, well-trained healthcare teams are capable of seeing more patients, performing more procedures, and scheduling more surgeries.

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Declaration of Ethics

The Author has adhered to the Principles of Veterinary Medical Ethics of the AVMA.

Conflict of Interest

The Author has no conflicts of interest.