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Build Your Practice's Operational Backbone

Systems, processes, and checklists are the unglamorous infrastructure behind every successful veterinary practice.

BY PETER WEINSTEIN, DVM, MBA

Veterinary medicine is a profession and a business. While clinical excellence remains the core of practice, successful veterinary entrepreneurs recognize that excellent medicine alone does not create a sustainable or scalable organization. Behind every efficient veterinary hospital lies a framework of systems, processes, and checklists.

Entrepreneurs often believe growth comes from innovation, new services, or marketing. In reality, growth comes from something less glamorous but far more powerful: repeatable operational systems. Systems transform chaos into reliability, individual effort into organizational capability, and group knowledge into scalable infrastructure.

For veterinary entrepreneurs — whether building a single hospital or a multilocation

enterprise — systems, processes, and checklists form the operational backbone of the business.

What Are Systems, Processes, and Checklists?

Although the terms are often used interchangeably, systems, processes, and checklists represent different components of operational management.

- ▶ **Systems** are the overall structure that organizes how work gets done. They answer the question: How does this part of our business consistently function?
- ▶ **Processes** are the steps required to complete a task or achieve a specific outcome. They describe what needs to happen and when. Standardized processes improve efficiency, consistency, and productivity while reducing errors and waste.

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- ▶ **Checklists** are the operational tools that ensure the process is followed every time. They are powerful because they compensate for human limitations, like memory, fatigue, distractions, and workload.

A system contains processes, and processes contain checklists. Surgical services is a system; preparing a patient for surgery is one of the processes within it; the pre-anesthetic safety checklist is a tool embedded in that process.

Why Systems Matter

Many veterinary practices operate based on a game of telephone — information stored in the minds of experienced team members is passed down from generation to generation. While this may work for small teams, it becomes dangerous as practices grow. Without systems, performance varies by employee, training becomes inconsistent, errors increase, and efficiency declines.

In contrast, documented systems produce six powerful advantages.

- 1 Consistency of Care and Service**
Clients expect the same level of care regardless of which team member they encounter. Systems ensure consistent clinical protocols, client communication, medical record documentation, and client experiences. Consistency builds trust and loyalty, which are critical in health care businesses.
- 2 Reduced Errors and Improved Safety**
Veterinary medicine involves high-risk activities. Standardized procedures reduce mistakes and ensure safety protocols are followed. Industries such as aviation and health care have long relied on checklists to prevent catastrophic errors. Veterinary medicine is no different.
- 3 Faster Training and Onboarding**
Every veterinary entrepreneur faces the challenge of training new staff. Documented processes shorten onboarding time by providing clear instructions and expectations. Standard operating procedures serve as built-in training resources for new employees. Instead of saying, “Ask Josie how we do that,” you can say, “Here’s the SOP.”
- 4 Scalability**
Business expansion requires replication, and replication requires systems. If your practice only works because specific individuals know how to make it work, scaling will be difficult. Systems allow you to replicate client experience, inventory management, financial controls, and staff workflows.

The best SOPs are written by the people who perform the work, not by managers who observe it.

5 Knowledge Retention

Veterinary hospitals often lose valuable knowledge when experienced staff leave. Well-documented systems preserve institutional knowledge so the business continues functioning smoothly despite turnover.

6 Operational Efficiency

Systems eliminate unnecessary decision-making. When team members know exactly what to do, productivity increases and bottlenecks decrease. Instead of constantly asking, “What should I do next?” staff follow the established workflow.

How to Create Systems and Processes

Many veterinary entrepreneurs assume that creating systems requires consultants or complex business software. In reality, systems usually begin with simple documentation. Build systems in your practice using these five steps:

STEP 1: Identify High-Impact Areas

Start with the processes that affect patient safety or revenue, occur frequently, or cause frustration or confusion. Examples include appointment scheduling, surgical preparation, client discharge, laboratory submission, or prescription refills.

STEP 2: Map the Process

Ask the team member who performs the task, “What are the exact steps you follow?” Document the workflow. A simple format works best. Be sure to include:

- ▶ Trigger (what starts the process)
- ▶ Steps in sequence
- ▶ Responsible team member
- ▶ Required tools or information
- ▶ Expected outcome

The goal is clarity, not perfection. This can be done using written outlines, flowcharts, whiteboards, or process mapping tools.

STEP 3: Convert the Process Into an SOP

Once the process is defined, convert it into an SOP.

SOPs typically include:

- ▶ Purpose
- ▶ Scope
- ▶ Responsible role
- ▶ Step-by-step instructions
- ▶ Required forms or software
- ▶ Safety considerations
- ▶ Quality checkpoints

STEP 4: Build a Checklist

For tasks that must be performed reliably every time, create a checklist. Effective checklists should be short, sequential, action-oriented, and easy to access. For example, an anesthesia preparation checklist could include:

- ▶ Confirm patient identity
- ▶ Verify consent form
- ▶ Record weight
- ▶ Calculate drug dosages
- ▶ Place IV catheter
- ▶ Attach monitoring equipment
- ▶ Confirm surgical site

STEP 5: Test the Process

Have a team member follow the documented process exactly as written. If confusion occurs, the process needs refinement. The best SOPs are written by the people who perform the work, not by managers who observe it.

Where to Store Systems

Systems must be easily accessible to be useful. They can be stored in your:

- ▶ Digital operations manuals
- ▶ Practice management software
- ▶ Internal knowledge bases
- ▶ Shared cloud folders

Digital systems allow SOPs to become living workflows rather than static documents.

How to Keep Systems Updated

One of the biggest failures in process

management is outdated documentation. To keep systems relevant:

- ▶ **Assign an owner:** Every system should have a responsible person. For example, your inventory system owner could be your head technician, whose responsibilities would include reviewing procedures, updating changes, and monitoring compliance.
- ▶ **Schedule regular reviews:** Review high-risk processes quarterly and standard workflows annually.
- ▶ **Encourage feedback:** Front-line staff often see problems first. Listen to their suggestions.
- ▶ **Track version history:** Maintain a change log that includes the date of revision, what changed, and why the change occurred. This prevents confusion and preserves institutional learning.

Measuring the Success of Systems

Use data and outcomes to evaluate your systems. Key performance indicators might include:

- ▶ **Operational efficiency:** Appointment cycle time, surgery start delays, technician utilization
- ▶ **Financial metrics:** Revenue per veterinarian, average transaction charge, inventory turnover
- ▶ **Quality metrics:** Surgical complication rates, medication errors, patient outcomes
- ▶ **Client experience:** Client satisfaction scores, online reviews, complaint frequency
- ▶ **Staff experience:** Employee turnover, onboarding time, staff engagement

Final Thoughts

Systems create organizational memory. Processes create operational clarity. Checklists create execution reliability. Together, they transform a veterinary hospital from a collection of talented individuals into a coordinated health care organization.

The most successful veterinary practices are rarely the ones with the most talented individuals. They are the ones with the best systems supporting those individuals. **TVB**



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PITFALLS TO AVOID

- ▶ **Overcomplication:** SOPs should be clear and concise. If an SOP is 20 pages long, no one will read it.
- ▶ **Writing without testing:** Processes must be tested in real clinical workflows.
- ▶ **Lack of leadership support:** If leaders ignore systems, staff will too.
- ▶ **Systems without culture:** Systems work best in cultures that value accountability, continuous improvement, transparency, and teamwork. Systems alone cannot fix poor culture.