PRACTICE SMARTER

The Metrics That Reveal Your Practice's True Health

A busy team and increasing revenue can mask early signs of attrition. Active client and patient data tell the story your appointment book won't.

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In the early days of a de novo veterinary practice, growth is easy to recognize. New clients are walking through the door with their pets every day, and your schedule is filling faster than expected. The focus is exactly where it should be: acquisitions. How many new clients did we gain this month? How many new patients did we see? How quickly are we growing? But step into a well-established practice, and the picture often looks very different. The schedule may be full, the team may feel busy, and revenue may even be increasing, yet growth becomes harder to define. Are we truly growing, or simply replacing clients who have quietly fallen off? Are our patients returning as expected, or are gaps in care starting to form beneath the surface?

The Data You Need to Monitor

For a new practice, the story begins to shift around the one-year mark. Growth is no longer defined solely by how many new clients you attract, but by how well you retain and care for the clients and patients you already have. This is where many practices unknowingly lose visibility. While attention remains fixed on new client counts, early signs of client attrition and lapsed patients begin to emerge. If your practice is more than a year old, it's time to pay attention to your active clients and patients.

The trick is to pull the information correctly from your practice management software. Ask your PIMS support team how to pull a report showing patients with visits or invoices in the past 18 months. There is usually no look-back period, as data changes every day. If I came to your practice with my cat and dog on Nov. 30, 2024, and you pulled the active client and patient lists on June 1, 2026, we would still be listed as active. However, on June 2, 2026, I'd be listed as a lost client, and my pets would be listed as inactive. Minus one client and two pets! Even if your team feels busy and you have new clients, you may still have a declining active client count.

For de novo practices, the 12-month mark is when the first wave of clients will be due for their next visit. By 18 months, the data becomes even more telling. Which clients returned? Which patients continued receiving care? Which quietly disappeared?

It's important to monitor patients and clients who are at risk of lapsing — those on your active list, but who haven't visited in 12 to 18 months. The focus should be on getting them back.

What the Data Means for Your Practice

Pull your active client and patient lists monthly, and track the trend over time.

One data point is a snapshot, but trends tell the story. Are the numbers moving together, or are they starting to diverge? Each of the following scenarios provides a different insight and requires a different response.

1 Increasing Clients; Increasing Patients

Typically, growing clients and patients simultaneously is a sign of a healthy practice. But this is where practices can develop a false sense of security.

Growth in active clients and patients should always be evaluated alongside new client and patient trends. A practice may appear to be growing and healthy simply because it's adding new clients faster than it's losing them. In these cases, strong marketing efforts can mask underlying issues such as poor retention, gaps in client experience, or low compliance. Over time, this creates a "leaky bucket," where growth becomes expensive and unsustainable.

Investigate how many new clients and patients are added each month, and how this compares to the change in active clients and patients. Are you retaining the clients you worked hard to acquire?

Do this:

- Monitor capacity closely. This is where practices often outgrow their team before realizing it.
- Track appointment availability.
- Begin planning for additional doctors or support staff before access becomes a problem.
- Ensure systems and workflows scale with growth (scheduling, callbacks, follow-ups).

True growth is not just about how many clients you add; it's about how many you keep. Without planning, growth can quickly turn into bottlenecks and staff burnout.

Implement or strengthen reactivation efforts (lapsed reminders, outreach).

2 Declining Clients; Increasing Patients

This often indicates you are relying more heavily on existing clients and possibly multi-pet households or increased spending per visit, while quietly losing client relationships. It might also be a sign of a new process being implemented at the practice, such as asking clients whether they have another pet in the household.

Do this:

- Review client retention and churn.
- Implement or strengthen reactivation efforts (lapsed reminders, outreach).
- Evaluate new client experience and onboarding.
- Audit availability for new appointments.
- Investigate if there are barriers to access, such as wait times, pricing perception, or communication.

Opposing client-patient demographics can feel like growth, but it may signal a shrinking client base over time.

3 Increasing Clients; Flat or Declining Patients

At first glance, this may seem contradictory. If new clients are coming in, shouldn't patient counts increase as well? In most cases, yes, which is why this pattern deserves a closer look.

Perhaps there has been a shift in household composition, with fewer multi-pet families.

Do this:

- Validate your PIMS reporting setup. Are your reports using consistent definitions and filters?
- Track patients per client as a supporting metric.
- Strengthen communication around comprehensive care for all pets in the household.

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When this pattern appears, the first step is to confirm the data, then understand what it is truly telling you.

4 Declining Clients; Declining Patients

This is the clearest signal of decline and requires immediate attention. It might be due to capacity constraints and clients being unable to get timely appointments. It might be due to a new clinic or service offering in the area. There might be internal factors, such as changes in pricing, hours, or staffing.

Do this:

- Analyze lapsed clients and patients, and identify patterns.
- Re-engage clients through targeted outreach campaigns. Are your reminders working?
- Evaluate appointment availability and scheduling efficiency.
- Assess team capacity and morale.
- Consider a marketing reset if acquisition has slowed.
- Review client experience and communication.
- Improve forward booking at checkout.
- Review treatment plan acceptance and compliance.

Without intervention, this trend compounds quickly and becomes harder to reverse.

From Insight to Action

These metrics are early indicators of where your practice is heading. When consistently reviewed and properly interpreted, they allow you to act before problems become visible.

At first, growth feels obvious. More clients, more patients, fuller days. But as your practice matures, growth becomes quieter and far more complex. It's no longer defined by how many new faces walk through the door, but by how many choose to come back. TVB

THE LAST WORD

Many reminder systems send a final vaccine reminder one month after the due date, with no further outreach occurring after that.

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