PRACTICE SMARTER

Unhand the Wheel

How to build a business that runs without you.

BY MIRA JOHNSON, CPA, CVPM, MBA

EXPERT COMMENTARY



There is something magical about a new year. The part I love the most is dreaming about the future, as if January 1 signifies a new beginning or opportunity. As we anticipate 2027, many of us will think about the things we want to change or improve: a better body, better financial health, a better job … the list goes on. What is your dream for 2027?

What if 2027 could be a year of transformation for your practice? It's possible, but you can't transform your practice alone. Successful practice is a team sport, and it will require that you learn how to let go and embrace delegation.

That's hard for many practice owners to hear, because so many of us were trained to believe that being indispensable is the same thing as being good at our jobs. If you built the practice, you probably built it by wearing many hats and doing many things yourself for a long time. But the skill that got you here is not the skill that gets you to what's next. What's next requires you to let go of the wheel in the right place, on purpose, so the practice can run without your hands on every piece of it.



Mira Johnson
The Practice Smarter columnist is the managing partner with JF Bell Group, a business consulting firm that helps startups and practice owners launch, manage, and grow the veterinary practice of their dreams. To learn more, visit cpasforveterinarians.com.

Letting Go in 2027

What if your inventory was organized, accounted for, and running efficiently, without you being the one who notices when something's low? What if you no longer oversaw the schedule or approved every timecard? What if you were no longer the one fielding every reorder call, every client billing question, every social media post, and every new-hire training session?

Here are some tasks that you should consider delegating:

- Inventory management: Most inventory management loose ends can be solved with technology. Incorporate your practice management system's real reorder points and automated alerts. Empower an accountable team lead to "own the count." Invest in their inventory-based continuing education. Consider reaching out to your PIMS representative or a veterinary consultant to see how other practices use their software. Streamline multi-vendor purchasing using platforms like Vetcove and ensure that the purchases are easily received within your PIMS. If your PIMS doesn't have an inventory module, check out other solutions that integrate with your software.
- Scheduling: Scheduling and timecard approval can be delegated to your office manager or lead technician. Grant them real authority, use software to handle the mechanics, and establish a clear policy to handle the judgment calls.
- Vendor relationships: Your vendor reps can be invaluable to your practice's success, but that requires open communication and active presence over time. Delegate these duties to your inventory lead or office manager, guided by established, clear rules and expectations.
- Client communications: Identify a team member to oversee client communications. And remember, many PIMS include automated communication tools and features — they just have to be fully configured. Let your communications manager research third-party applications that integrate with your software, and explore adding an artificial intelligence receptionist to help your team with phone volume.
- Accounting: This area can be easily outsourced to a veterinary-specific bookkeeper or accounting service. Think about efficiency, priorities, and capabilities when evaluating whether it makes more sense to maintain certain functions in-house versus outsourcing. One size does not fit all!
- Staff training and onboarding: Again, utilizing the capabilities and interests of your team members, assign a designated trainer. Equip them with the resources needed to be effective, along with a documented process, so it doesn't live only in your head.
- Marketing: Not only can marketing and social media be delegated to a trusted team member or part-time hire, but it can also be outsourced to an agency. Empower your marketing person with real ownership of the content calendar and the resources necessary to accomplish the predefined goals.
- Facility management: Facility and equipment management is rarely a crisis until suddenly it is. Left to chance, issues tend to happen at the worst possible moment, often mid-appointment, and are usually expensive. Enter proactive prevention. The fix isn't you personally walking the building every week. It's a designated team member with a maintenance calendar, a vendor service contract that runs on autopilot, and a simple checklist that turns "somebody should probably look at that" into a scheduled, owned task. Handed off well, this is one of the quieter wins on the list, but it's the one most likely to save you a surprise repair bill down the road.

istockphoto.com/sturti

You don't rise to the level of your goals; you fall to the level of your systems.
— Theme from "Atomic Habits" by James Clear

Delegate Gradually

Delegate, but be cautious. You won't hand off seven areas of your practice in January and have all seven running smoothly by March. You'll just create seven half-finished systems and end up right back where you started. Change small and change often is a motto to live by!

Two books can help you with this. "Atomic Habits" by James Clear teaches that real change comes from small, consistent systems, not big dramatic overhauls. You don't rise to the level of your goals; you fall to the level of your systems. "The One Thing" by Gary Keller asks a key question. What's the one thing you can do such that, by doing it, everything else becomes easier or unnecessary? Not 10 things. One thing.

Delegation is a system, not an event. It has to be built one domino at a time, or it topples before it stands. ■

YOUR 2027 PLAN

Here's a roadmap to transform in 2027:

- **First:** Develop and review a list of everything you're still holding onto. Be honest and pick the one item that, if you hand it off well, would free you from the most time, energy, or stress.
- **Quarter 1:** Identify who or what takes over your "one thing." Build the system. Document it. Hand it off fully, and resist the urge to hover. With that being said, don't just blindly hope it's all working. Create regular check-ins to see what's working and what could be improved.
- **Quarter 2:** Protect and stabilize what you built. Don't add a second area yet. Spend this quarter making sure that your Quarter 1 changes are sustainable under pressure. Fix what breaks and tweak as needed. Don't move on until it's running successfully without you.
- **Quarter 3:** Choose your next "one thing." With one area now fully off your plate, pick the next single item from your list. The process is the same. Choose the owner, choose the tool, build the system, hand it off completely.
- **Quarter 4:** Protect Quarter 3's system the way you protected Quarter 1's. Then, reflect and celebrate the victories with your team! After all, two real areas delegated, built to last, are worth more than seven attempted, and none of them being successful.