

# The Secret Sauce to Optimizing Workflow



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**Optimizing your workflow and fully utilizing your team allows you to be efficient, productive and profitable. Over time, even “great” workflow requires evaluation so using 4 strategic steps we will breakdown your workflow and identify what is necessary to be your best!**

## LEARNING OBJECTIVES

- Learn how to dissect and improve your workflow by understanding your space, assessing time, establishing your toolkit and evaluating positions and people.
- Utilize your people fully; allow them to shine and contribute with pride.

## SUMMARY

Let's explore 4 strategic steps in order to breakdown the workflow in your practice and figure out where there are opportunities lurking for increased efficiency, productivity and profitability!

### 1. KNOW YOUR SPACE

We spend a great deal of time in the building, inherently knowing it's ins and outs, but rarely actually evaluating it. Start by taking a step back and understanding what you have. Draw it out. Stare at it. Think about it. Share it with the team. Stare at it together. Talk about it!

- Are there underutilized areas?
- Where are there bottlenecks (traffic related)?
- What ideally should happen in each space?
- What actually happens in each space?
- What are the pros and cons of each space (sound, multi-purpose conflicts, access to necessary materials/people, space restrictions, privacy, etc.)?

Apply all of the knowledge gained to brainstorm with your team and try new processes that better utilize your space.

### 2. ASSESS TIME

Start by assessing your schedule. There is no correct way of setting up appointments, surgery times, etc. Depending on the team you have, the veterinarian needs, the hospital layout, the brand of your hospital, these things will differ. That said, you do need to evaluate whether the timing of things in your schedule fits with who you are as a hospital and your commitments to clients, patients and team.

Consider whether people have time to complete the tasks important for:

- Generating revenue
- Best patient care
- Maintaining/fostering positive client relationships

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“Having the time” doesn’t necessarily mean literally assigning time. It means managing your time and prioritizing your tasks; utilizing every moment. This may mean coaching team members so that time is used efficiently and effectively. Don’t be afraid to discuss time management with individuals. Some people are much better at multi-tasking than others. That doesn’t give them the excuse not to multi-task, it just means the coaching and resources they require may be different to somebody to whom “juggling” comes naturally. For those who genuinely struggle with multi-tasking, dropping the proverbial ball and ineffective performance related to anxiety/feeling overwhelmed are just a few of the challenges they will face. Assist them in exploring strategies to combat personal workflow and time management struggles.

You can utilize almost the same list of questions as we used for evaluating space, to evaluate time. Where are there bottlenecks? What takes up a lot of time? When could you use more? Is there redundancy? Are we rushing? Are people standing around?

We have a sense that we always need more time for everything but the truth is, when you actually break down the day, there are often periods when time is lagging for people. An example could be when everything is ready to go in surgery but appointments are still going on and everybody is in a holding pattern waiting for the doctor. What could we do differently? How can we utilize their time effectively in the interim?

Layer the conversations of space and time as they do go hand-in-hand and one often affects the other.

### 3. ESTABLISH YOUR TOOLKIT

You want to work towards minimizing redundancy and error while maximizing efficiency, accuracy and experience (of the clients and team). In order to do this, you need to come up with tools that allow you to be your best. Tools can be methods of non-verbal communication, scheduling tactics, handouts and client resources, written resources to expedite verbal processes, even positions on the team. The most important thing about workflow tools is that they are used consistently, both with respect to frequency and in how they are used.

Define tools with a Why, What, How:

- **Why** do we need a tool? What issue are we preventing or resolving, or what resolution are we supporting?
- **What** is the tool? Each tool should be clearly defined so we know it is meant to serve a purpose.
- **How** do we use this tool? There should be a clear understanding of how to use the tool so that it is used consistently and with purpose.

When we identify the need for the development of a new tool you can use a system to ensure the tool achieves the goal (why was it created in the first place?) and isn’t creating any additional issues. It is important to communicate new tools to the entire team so that you are all on the same page as to the **Why, What, How**.

### 4. EVALUATE POSITIONS AND PEOPLE

It is essential that you fully utilize your team in order to optimize workflow. What are the absolute requirements of your practice? What tasks need to get done in a day? Connect positions to your big picture based on these necessary tasks. Do all positions make sense? Are there unassigned tasks? Work towards clarity, looking for opportunities and unnecessary redundancy.

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With respect to positions, consider:

- Who has the time?
- Who has the skill/ability to learn? (who is most qualified?)
- Who shouldn't get drawn in unless absolutely necessary?
- Who shouldn't get drawn in (EVER)?

Don't be afraid to set boundaries in order to keep people focused and safe. Don't be afraid to think in terms of maximizing profitability and minimizing cost.

Ideal workflow dictates there are very specific roles and responsibilities. People need to know what is expected of them, and how their contributions tie into the big picture. In order to fully utilize your team, people need to be aligned with the big picture goals of the practice. They need to understand how they fit in and should be put into a position that sets them up for success.

- Are they capable of the things that are expected of them?
- What are their individual strengths and interests  
(important to consider what they believe vs. what you believe)?
- What are their relief points and pressure points?

**Leverage** - Ask what they could contribute toward the big picture that they are not contributing now.

**Educate** - What do they want to be a part of and what is holding them back? What assistance can be provided? Don't exclude in-house resources... always look within first!

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## TOOL KIT

### ASSESS HONESTLY

- Nothing is personal. Being our best is what counts.
- Know what your Big Picture looks like and stay aligned with it. What are your goals? Whether through Mission, Vision, Brand, Values or something else, defining the Big Picture allows others to have context and get onboard.
- Keep Efficiency, Productivity and Profitability at the forefront and use these three buckets to assess the significance of workflow issues.

### DON'T THINK IN ABSOLUTES

- Look for processes that work consistently and accept that there will always be an unpredictable situation.
- Don't avoid putting a process in place because it isn't perfect.
- Even when something is perfect, it may need to be tweaked or revamped in the future and that's okay!

### BRAINSTORM BIG!

- Start with the outrageous and work your way back to what is possible.
- Layer ideas to come up with creative solutions.
- Don't be afraid to try things.
- Encourage team participation and allow multiple avenues for honest feedback to account for different personality types.
- Have a zero-tolerance policy for idea shaming – everybody should have a voice, you never know when the next great idea will emerge.
- Have Fun!

### KEY POINTS

- Don't let perfect be the enemy of good.
- Maximizing Efficiency, Productivity and Profitability is beneficial for team, clients, patients and business.
- Allowing the team to be fully engaged and contributing in a way that is personal to them leads to greater success.
- Workflow is not about "The Right Way," it's all about what is "Right For You." Your team has the answers!