

# Moving in the Same Direction: The Importance of Strategic Planning

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This is the fourth and final interactive session with a focus on the owner/practice manager relationship. We will focus the next 90 minutes on planning together for success. By establishing productive planning sessions, you will notice an increase sense of unity within your leadership team. In essence, together, you will create purpose, direction, and momentum. A powerful combination.

I recently completed 2 strategic planning sessions with my two practice owners. Every time we wrap up a session, I feel reinvigorated, excited, and motivated to push forward. Having a plan in place, although we will have to deviate at times, gives each of us a sense of relief, a sense of purpose, and for a moment, as sense of relaxation. While the relaxation is short lived, you will be amazed by how you feel when creating a concrete plan with timelines and priority status.

Strategic planning isn't new to us at Meadow Hills. But what I can tell you is we have become quite good at it. If you were to be a fly on the wall 10 years ago versus our last meeting in March you would notice a much different style meeting. In fact we have a pre-read before each set of meetings. Our 2012 planning sessions brought us *"Predictable Success" by Les McKeown*. By having a book to pre-read, we are able to open discussions on how the material relates to our specific clinic. We are able to self-evaluate and use terminology from the book that everyone in the meeting understands. It is objective data that we can learn from and help us move forward with our own agenda. The books content has been vital for our past meetings this year. We continue to mimic much of its thoughts and ideas.

Our planning sessions are much more intense with a sense of urgency and efficiency than in past. We certainly take time to have creative input but I will tell you we take these meetings more seriously than ever. They are our roadmap for the future. They sync all of our ideas, goals, budgets, and desires for the business together. Our economy, our clientele, our staff have needs and wants which are changing faster than ever. By implementing and consistently holding strategic planning meetings, your clinic too will be able to stay ahead of the curve. By carrying out the decision making, the training, and holding the team accountable, success will already be determined.

What these meeting are not is deciding for our clients and the pets they serve what it is we think they want. If there is only one lesson from this section you take home, it is learning and understanding the two most dangerous words in business. "WE THINK" It doesn't matter what we think. \*It only matters what our clients think. Our job is not to build a better mousetrap and catch clients into services and products that they don't want or feel like their pets need. Relationships based on business techniques like that are often short-lived. I am much more interested in how to bond the client to my practice for a lifetime. Let's learn a lesson from the makers of Coca-Cola. Many of you participating today may remember the Pepsi Challenge back in the mid 1980's. Some of you may have even participated. As you entered supermarkets across the nation, you have a chance to sip 2 - ½ ounce cups of unlabeled cola. One was Pepsi and the other Coke. You voted which one you thought tasted better. Overwhelmingly, Pepsi came out the winner. Coca-Cola freaked out and went to their R & D department and had them create the NEW Coke which was much sweeter and very similar to Pepsi. Many of you know the New Coke bombed and was off the shelves in less than 18 months and Coke Classic eventually replaced it. What happened? Well consumers did prefer Pepsi in small increments. But for you serious pop drinkers, you know we drink soda in 20 ounce bottles, 48 ounce big gulps, or 2 Liter bottles but certainly not a ½ ounce shots at a time. Coke had failed to do its own research and ask the simple question to the Coke Loyalists. What is it you want? Instead they broke the number one rule and said "We Think" this is what our loyalists want. Disaster.

I once almost created the same mistake. This was a few years ago and I wanted to start checking our clients out in the exam rooms. It made sense to me because I would see clients trying to get our their checkbooks to pay while their golden retriever was pulling on the leash to the left, their baby boy was pulling Mom's hand to the right. The children's area cartoons were blaring, the telephones were ringing, and the cat from the humane society was loose. What a chaotic environment. If I could eliminate all of that and involve clients in the exam room it would contribute to a positive experience. I purchased the computers and even the wireless credit card processors for the rooms. I was ready to go. But I stared at a coke bottle sitting on my desk and thought of the story I like to tell. I said to myself, how can you make this change without first getting input from the very people that make us exist. Remember, our clients and their pets. So that's exactly what I did. For three months, I surveyed all of our client's whose pet's had a wellness exam. The specific question read: After your visit is complete with the doctor, would you prefer to check-out in the exam room or the reception area as we do now? Shockingly 71.43% said they still wanted to check-out in the chaotic reception area. Only 19.05% said they wanted to check-out in the exam-room with the rest of the responders' marking undecided. I was stumped. So we continued to research and we found out the clients have such a bond with the receptionists that they don't want to miss out on that contact with them. They like to say goodbye to the receptionists, they like to update them on their family, their activities, and even update them on how their pet did with the doctor. Had I did the "I think" or We Think" I would have gotten it wrong. Don't make the same mistake as Coca-Cola did so many years ago.

In our strategic planning sessions we often create a list of information we need from our clientele in the format of a survey. We will complete these surveys 2-3 months before our meetings so we have the information ready to go. The invaluable information that we gain will aid in our creation of our roadmap and where are going with the company.