



# VetAdvise.com

Knowledge & Coaching = Empowerment

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## OFF SITE MANAGEMENT

This individually designed program delivers effective practice management to your veterinary clinic starting by working with you to identify your desired operating objectives. We then work with you and your staff to achieve desired results and objectives. The ongoing program provides timely reporting including consistent feedback to measure results. We work directly with your staff to bring desired action to your practice while you get to play veterinarian not manager! You can review and choose from the different services we offer below:

### **a. Coaching Discovery Session**

With a view to determining your personal and business objectives in owning and operating your veterinary practice, we will meet for an agreed to time period and at a mutually agreed to location, to discuss your perceived relationship with your business, addressing in conjunction therewith, you achieving an identified balance in your personal career / business and general life objectives (the "Coaching Discovery Session").

This meeting session normally has duration of approximately eight (8) hours during which we will review answers or responses you have provided in various questionnaires we have supplied. As well, we will discuss your personal life / business operating objectives with a view to clarifying these issues. By the conclusion of the Coaching Discovery Session, it would be our objective to have formulated a personal long term vision (five years) for yourself and your business, as well as establish certain actions identified as being required to bring your plans to reality within a reasonable time period.

Should you wish to terminate this session prior to the expiration of three (3) hours of the session, the fees shall be waived.

### **b. Monthly Coaching Sessions**

With the general vision established during the Coaching Discovery Session, we will hold scheduled monthly coaching discussion sessions to review various issues arising which you believe are holding you back or restricting you in advancing towards your long term vision. Included with these discussions will be a presentation of the previous month's operating results as well as identified ongoing management issues arising in your business (the "Monthly Coaching Sessions").

The scheduled Monthly Coaching Sessions will have a duration of approximately one and one half (1½) hours, with an agenda that we will co-actively develop prior to the meeting and shall take place by way of telephone conference, unless other arrangements are made prior to the scheduled meeting.

### **c. Employee Interviews**

Subsequent to the noted Coaching Discovery Session, we may conduct one on one interview with each of your staff employees with a view to assessing their level of job satisfaction as well as confirming their perceived relationship with the clinic and their fellow employees (the "Employee Interviews").

Should we decide not to complete the one on one interview, we will solicit answers to a questionnaire to be completed by all employees on a confidential basis as between ourselves and the individual employees, to be used in finalizing the format for an employee workshop.

In preparation to the Employee Workshop, we will meet with you to review and discuss our general comments and recommendations as arising from either the one on one interviews and/or questionnaires. Specific discussion topics and/or comments made by or with employees shall remain confidential between us and the employees.

**d. Employee Workshop**

Subsequent to the Employee Interviews or our receipt of Employee Questionnaires and discussions with you, we will conduct a scheduled Employee Workshop with duration of approximately four (4) hours at a location (preferably) other than the clinic operating premises. The objective of this meeting will be to share with the employees your long term vision, as well as work with the employees to develop an Employee Mission Statement and a Vision Statement for the operation. In concluding this meeting, we will work with the employees to develop an Action Listing of duties and responsibilities the employees as a group, have committed to complete within a minimum of thirty (30) days following the workshop (the "Employee Workshop"). Dependent on Employee issues raised during the workshop, we may also establish Action Lists for sixty and ninety days following the workshop.

As the owner of the veterinary practice, you will be required to attend this workshop. However, your attendance will be as a support employee without authority or management position and as such, any discussion taking place at this workshop will remain within the confines of the meeting itself. The employees will be encouraged to speak openly and frankly as to the practice operations as well as provide suggestions and recommendation as to improvements required in order to achieve the stated Employee Mission and Vision statements. *As the owner, you agree not to influence future employee staff management issues based on employee contributions or comments made during this meeting.*

In discussions with you and in line with your long term vision, the emphasis of this workshop will be to empower the employees whereby they will begin to actively participate in the overall and day to day management of the clinic operation and in conjunction with your practice/office manager.

We will provide you with the attendant's evaluation of this workshop, together with all comments made for your reference.

All costs associated with conducting this workshop, including room rentals, refreshment and beverages served, etc. shall be at the direct cost to the company and will not be borne by VetAdvise.com or Terry Jackson, C.G.A.

At the conclusion of the employee workshop, employees will be requested to complete a valuation on the workshop, with performance being rated from 1 to 5. Should the employee rate the workshop "3" or below, no fee will be charged for the workshop, nor would we propose holding proposed staff meetings with a member of VetAdvise.com in attendance.

**e. Staff Meetings**

Following the Employee Workshop, we recommend that staff meetings be conducted with the support staff members monthly during the following ninety days at which a representative of VetAdvise.com will personally attend. Such scheduled meetings will be

conducted in conjunction with a written agenda with discussion minutes being prepared by a member of the support staff.

Staff meetings shall have a duration of approximately two to three (2 to 3) hours and take place at a mutually agreeable date and time.

Any costs associated with the holding and conducting of these staff meetings shall be at the sole cost of the company.

Staff meetings held after or in addition to the initial three meetings shall be at an additional cost based on an hourly rate of two hundred and fifty dollars (\$250) per hour.

**f. *On Going Consultations***

On an ongoing basis, Terry Jackson shall make himself available to telephone consultations for up to two (2) hours per month for the benefit of either yourself or support staff members (the "Retainer Time").

For each hour or portion thereof expended by VetAdvise.com in excess of the Retainer Time shall be invoiced on a monthly basis at the hourly rate of two hundred and fifty dollars (\$250) multiplied by the actual time incurred.

**g. *Monthly Financial Review***

On a monthly basis, the company's bookkeeper shall forward to VetAdvise.com a Balance Sheet and Statement of Income for analysis and review by Terry Jackson, C.G.A.

On a monthly basis and in conjunction with the Monthly Coaching Sessions, VetAdvise.com will discuss and present for discussion purposes such financial results and operating position as reported (the "Monthly Financial Review").

On an ongoing basis, VetAdvice.com will communicate with the company's bookkeeper so as to ensure the monthly financial statements are representative of the financial position and operating results of the company.

**h. *Annual Financial Statement Review***

In conjunction with the release of published fiscal period end financial statements, VetAdvise.com will conduct a review and analysis of such financial reporting in preparation for presentation to the owner. Such review and analysis will be restricted to reporting on the financial operation and financial position. It will *not* include income tax computation, consultation or advice; such services being provided by the company's external accountant (the "Annual Financial Statement Review").

In conjunction with the presentation of the annual fiscal period end financial statements, Terry Jackson will discuss with the owner an operating financial budget for the forthcoming fiscal period.

**i. *Additional Professional Services***

Professional services and/or advice provided during the contract period and not falling within the specifically noted services as outlined above, shall be invoiced on an hourly basis of two hundred and fifty dollars (\$250) per each hour or portion thereof multiplied by the actual time incurred by VetAdvise.com and invoiced monthly.

If you have any questions regarding Off Site Management for your clinic, please do not hesitate to contact our office for a more detailed discussion.