

Practice Manager Foundations Course

2027 Spring Course Syllabus

Course Overview

This 24-week program equips veterinary practice managers with core competencies across three major themes: Leadership, Finances, and Operations. Through a blend of leadership development, financial literacy, and process optimization, participants will acquire tools to elevate practice performance and support team success.

Week 1: Kickoff & Orientation

- Course goals, schedule, expectations
- Introduction to core themes: Leadership, Finances, Operations
- Overview of final project and goal setting
- *Suggested Reading: Oops I Became a Manager – Amy Newfield*

Week 2: The Leadership-Management Dilemma: Clarity and Application

- Define leadership vs. management
- Explore leadership development
- Understand situational use of leadership and management
- *Suggested Reading: Leadership and Self-Deception – The Arbinger Institute*

Week 3: Leading with Impact: Leveraging Your Clifton Strengths

- Interpret Clifton Strengths assessment
- Identify individual leadership strengths
- Develop strengths-based leadership strategies
- *Suggested Reading: Strengths Based Leadership – Don Clifton*

Week 4: Crafting Purpose: Mission, Vision, and Values

- Define and differentiate mission, vision, and values
- Connect team and client purpose (mission)
- Facilitate team collaboration to define values
- Apply values in daily practice operations
- *Suggested Reading: Start With Why – Simon Sinek*

Week 5: Change Leadership Essentials: Empowering the Veterinary Team

- Lead and manage change effectively
- Use feedback loops to support transitions
- Balance delegation with direction
- Build team engagement through change
- *Suggested Reading: Leaders Eat Last – Simon Sinek*



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Week 6: The Power of Clear Communication

- Define clear communication in a leadership context
- Explore how communication impacts morale and performance
- Practice techniques for clear verbal and non-verbal messaging
- Adapt communication to diverse team members
- *Suggested Reading: Radical Candor – Kim Scott*

Week 7: Leading with Empathy: Enhancing Communication Through Understanding

- Understand the role of empathy in leadership
- Develop techniques for meaningful responses
- Adjust communication styles to meet individual needs
- Use empathy to boost morale and connection
- *Suggested Reading: Change Your Questions, Change Your Life – Marilee Adams*

Week 8: Empowerment & Accountability

- Understand how empowerment and accountability work together
- Learn how to set clear expectations and measure performance
- Identify how and when to intervene when course correction is needed
- *Suggested Reading: Multipliers – Liz Wiseman*

Week 9: Human Resources: People, Policies & Performance

- Explore best practices for recruiting, hiring, and onboarding
- Discuss workplace compliance with various organizations (DEA, OSHA, etc.)
- Learn to identify performance issues vs conduct issues, and how to manage both.
- *Suggested Reading: Crucial Conversations – Patterson et al.*

Week 10: Optimizing Operations:

- Assess how processes affect team and client outcomes
- Identify gaps in current workflows
- Create a plan for operational improvement

Week 11: Financial Fundamentals: How the Money Works

- Begin exploring the foundational structure of a Profit & Loss statement
- Understand how revenue and expenses interact
- Identify how these metrics impact overall financial performance

Week 12: Open Forum Discussion

- Discuss high priority topics picked by attendees
- Attendees will identify topic for final project



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Section 2 *(following a 4 week break)*

Week 13: Profit & Loss: The Story Behind the Numbers
- Learn the structure and significance of a P&L statement
- Understand P&L Statements and how to use them for financial decision making
- Identify key financial metrics for hospital success

Week 14: Profit & Loss: Shaping the Story
- Interpret financial data to guide business decisions
- Understand and benchmark the five key financial indicators
- Analyze your own practice's P&L to find trends, gaps, and opportunities for growth
- Learn how to implement changes to improve financial health

Week 15: Understanding Cost of Goods Sold (COGS)
- Understand COGS definitions and goals
- Track inventory using PIMS
- Apply ABC analysis and budgeting techniques

Week 16: Strategies for Success in Cost of Goods Sold (COGS)
- Implement effective inventory ordering and reconciliation
- Conduct accurate counts and maintain organization
- Strengthen vendor relationships to control costs

Week 17: Navigating Payroll
- Break down payroll components
- Analyze payroll tracking tools
- Understand how efficiency impacts payroll

Week 18: Tailored Pricing Solutions
- Create consistent and transparent pricing strategies
- Adjust pricing based on local demographics and goals
- Use bundling to enhance perceived client value

Week 19: Transforming Client Service into Client Experience
- Differentiate between service and experience
- Map and analyze client touchpoints
- Engage the whole team in delivering exceptional experiences
- *Suggested Reading: If Disney Ran Your Hospital – Fred Lee*



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Week 20: Client-Focused Marketing

- Understand how to deepen the impact of client experience strategies
- Learn how to utilize client feedback to drive improvement
- Explore tools and processes to enhance every client touch point

Week 21: Sustainable Scheduling: Balancing Care, Capacity & Wellbeing

- Design schedules that reflect hospital values
- Balance client care with team well-being
- Build flexibility and structure into daily operations

Week 22: Workflow Optimization: Procedures & Appointments

- Learn how to improve operational efficiency by refining team roles and workflows
- Understand the importance of streamlined protocols
- Explore how to analyze appointment flow for areas of improvement

Week 23 & 24: Wrap Up & Final Project Presentations

- Final project presentations
- Review action plans
- Discuss accountability strategies