

## Freedom, Creativity -- and Systems?

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If you've ever gone to a seminars on practice growth, taken any courses on the topic, or even talked to people who have, then you know the concept of "systemization" is a big one. At first glance, it seems like something dreamed up in the furthest corner of "Theory-Land," so far removed from your real practice that it's almost laughable. After all, every situation is unique. Every patient is unique. How in the world could you possibly have a step-by-step system and procedure manual to handle the myriad of unique situations that crop up in your practice every day?

The problem, as is often the case, isn't with the concept itself, but with the way it's too often poorly presented and discussed. The truth is that setting up systems the right way is one of the easiest things you can do to move your practice from good to world class - and enjoy the benefits that come from doing so (more patients, better relationship with patients, higher cash flow in your practice, etc).

### The Problem With the Concept of Systems

When most so-called "experts" trot out their material, they typically use two examples to demonstrate the power of systems. Unfortunately, your practice is a world away from both of these examples. The first example most use is McDonalds. "Did you know," they ask you with wonder in their voices, "that at McDonalds, they have a 1,000-plus page procedure manual, including step-by-step processes laid out for how to clean the bathroom?" The second example is telemarketers. After all, they've got a highly regimented system in place. Their every word is scripted, including their response to every objection. "Telemarketing is a multi-billion-dollar-a-year business", these experts point out.

You know, it's odd, but I've never met a practice owner who was eager to latch on to *any* idea because McDonalds uses it to keep their bathrooms clean, or because it's interrupted them during dinner 8,000 times ... no matter how much money it makes.

So, let's take it as a given that when we talk about systems, we're not talking about these distasteful things that have absolutely nothing to do with your practice.

### Practice-Friendly Systems

The idea that systems are hyper-detailed, unrealistic and unattainable policy manuals is really harmful to practice owners, because it drives them away from the whole concept of systemization, which is incredibly powerful. Let's take a closer look at what systems are, and ways that you can use them to make running your practice a lot easier.

The first thing to realize is that, at the most basic level, a system is just a guideline or set of guidelines for acting in a given situation. It is definitely not something that's carved into stone or unalterable. Instead, it provides a structure and a framework to work with that generates consistent results.

Let's look at an example you're probably already using in your practice. When you see a new

patient for the first time, your goal is to diagnose them and then treat them. You need to find out what brought them in, find the immediate cause, and then find the underlying conditions, so you can help them in the short term and longer term. Think about the process you go through with every new patient. It will vary slightly from practitioner to practitioner, but the long and short of it is that you probably do the following:

- Ask them some initial questions.
- Perform some movement and mobility tests.
- If applicable, take an X-ray or other test utilizing advanced diagnostic equipment.
- Begin developing and implementing a treatment plan.

At the most basic level, what you have there is a system. It's something you can do with every patient that's flexible enough to allow you considerable room to customize it for each patient. If you ignored any of the areas outlined above, you'd probably be underserving that patient.

### Systems as Guidelines

When you start thinking about a system as a guideline, rather than as a rigid structure, it becomes much easier to see how to apply systems to your practice. When you think of a system as a checklist of the minimum requirements for a given situation, it becomes clear that it is an extremely powerful and extremely easy thing to do in your practice.

Let's look at another example. In most practices, a *huge* percentage of patients never have more than 10 visits. In some practices I've worked with, nearly 50 percent of patients who walk in the door never come back for an 11th visit. So, how could a set of new-patient systems help correct this problem? Consider the overview of systems a practice might put into place to keep new patients. They'd need to consider the following seven steps, at minimum:

- handling the initial incoming telephone call;
- first visit (staff greeting, initial paperwork, etc)
- doctor's preparation before greeting patient;
- initial greeting (doctor) and discussion of what brought the patient to the office;
- diagnosis procedures;
- report of findings and treatment recommendation; and
- post-visit follow-up (additional information about your practice, answering and soliciting questions from the patient, telephone follow-up, etc.).

Each of these areas will have its own checklist of what constitutes a successful interaction. Some will be simple, some will be more complex, and some may be split into multiple systems. For example, for a full system, the first visit (staff greeting, initial paperwork) might be broken down to the following:

- Establish eye contact and greet patient as soon as they walk in the door.
- If you recognize patient, greet them by name. If you don't, ask how you can help them.
- Inform patient of any delay in the doctor's schedule (if applicable).
- Ask what brought them in - assure them the doctor is very experienced in helping patients with that problem.
- Hand patient initial paperwork - walk them through each section, answer any questions that come up, and ensure it's filled out completely.
- Introduce patient to the doctor.

Now, nothing in there is complicated. In fact, it's notable for its obvious simplicity. These systems aren't powerful because they're complicated - they're powerful because it's easier to do everything on the list than to skip a piece of it. And when you execute all of your systems properly all of the

time, you're going to have a much higher success rate with all of your patients.

Earlier, I suggested seven areas that you could systemize just for new patients. If each of these seven systems had just five steps, that would be 35 things to do with every new patient who comes in. They're 35 easy things, to be sure, but that's still quite a bit to remember. Especially when you and your staff are running late, feeling stressed and have too much on your mind to begin with.

Obviously, this wasn't an exhaustive list; it's just a quick example of how you could incorporate systems into your practice. But you can probably already see that it'd be very easy to set up a lot of systems in your practice, encompassing hundreds of steps. Relying on memory alone to do every one, every time, is probably a bad bet.

### Putting the Power of Systems to Use in Your Practice

Incorporating systems into your practice doesn't mean creating a word-for-word script for a million different scenarios, or taking away the ability to adapt to unique circumstances. It doesn't mean that you have to spend months putting it together, only to never use it. Instead, it's all about setting up general guidelines that you'd ideally follow anyway. Here's a simple system (checklist) that you can use to put the power of systems to use in your practice.

- Identify an area you want to improve consistency in.
- Decide what an "ideal" version of that area would look like.
- Break it down into easy, concrete steps.
- Write them down in the order they need to be done.
- Train yourself and your staff to follow each of these steps every time the situation comes up. (It often helps to print out the checklist so you can make sure you haven't missed any points.)

The beauty of having these checklist systems is that it only takes a couple of seconds to glance at them and be reminded of what needs to be done. Those couple of seconds mean you're not going to miss any steps, which means that you're far less likely to lose any new patients.

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