HotDoc

A Guide to Planning, Tracking & Reaching Goals in 2021

February 2021

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This session will cover

- How to effectively **identify, plan and reach goals** in 2021
- Strategies to **engage the practice team** in goal setting
- Effective ways to **promote and support practice, team and individual growth** through meaningful goals
- Overview of **5th Edition Accreditation Standards relating to planning & tracking goals**

Lessons from 2020

2020 taught us that the **unexpected and the *unprecedented* can happen**

Best laid plans may need to be **entirely reimagined or even scrapped** in the face of a crisis or major unexpected event

Being *agile* and able to react and adapt to a changing landscape is often more important for survival and to properly thrive

Goals come in all shapes & sizes

Before planning goals consider:

- **Practice/Business** goals, **Team** goals, **Individual** goals
- Are the changes you are after **Short**, **Medium** and/or **Long term?**
- Type of goal you'd like: **business or financial**, **team** performance, **retention**, **clinical** outcomes, **patient satisfaction,** anything else?
- Are you aiming to improve **quality** or **quantity**, or **both**?
- Are you looking to **Grow/Expand** or **Maintain** at current levels (without going backwards), or **Enhance quality or balance** with existing resources (which may mean scaling back)
- What goals do you **realistically have the resources to stay on top of**?

Start small and evolve your plans as you get more comfortable with the process

Why set goals:

- **Essential if you want** to be in a **situation that is drastically different to where you are right now**
- **Makes it easier to prioritise tasks** based on whether or not they **get us closer** to our goal
- Can **inject a sense of meaning and purpose** (if the **goal is meaningful and shared** by the team)
- Can **bring the team closer** together
- Can **help a team work through individual differences**
- Can **make daily work more interesting, engaging or motivating to do**

Planning goals as a team

Benefits of using a team approach:

- **Build a culture where everyone feels their contribution is valid and appreciated**
- Identify areas or processes which **could be more efficient**
- **Motivate staff** to provide a high quality service
- **Enhance clinical care** for better health outcomes
- Identify **opportunities for new patient initiatives** which may lead to better patient engagement or improved financial viability

Engaging the Practice Team

- **Regularly invite staff to offer input. Listen to feedback** and ideas with an **open mind**
- **Support and acknowledge team feedback.** Never use it to ridicule, coerce or discipline staff
- Use internal **surveys and polls** to get an idea of staff preferences and input around particular issues or about the practice in general
- Use **team meetings** as another opportunity to get staff input on changes needed or proposed
- Ensure there is **two-way communication during team meetings.** Staff should be encouraged to offer ideas and suggestions
- Take on ideas from the team and **report back** on what changes have been made in response to their input

Identify & Acknowledge Your Values

Your values will help you prioritise and even decide what needs to get done when faced with difficult choices along the way

Your values will help you determine:

Ultimately… **what is most important to you as a practice, as a business, as a team, and as an individual?**

Sample Values List (for self-reflection)

Authenticity
Achievement
Adventure
Authority
Autonomy
Balance
Beauty
Boldness
Compassion
Challenge
Community
Contribution

Creativity
Curiosity
Determination
Fairness
Fame
Fun
Growth
Happiness
Harmony
Honesty
Humor
Influence

Justice
Kindness
Knowledge
Leadership
Learning
Love
Loyalty
Mastery
Meaning
Openness
Optimism
Peace

Popularity
Recognition
Reputation
Respect
Responsibility
Security
Self-Respect
Service
Stability
Status
Trustworthiness
Wealth

When our **goals don't align with our values** we're in for **double the effort** & **half the reward**

When **goals & values align it still takes effort, but the journey itself is purposeful & rewarding**

Setting SMART-ER Goals

Specific: What is it? Who is involved, where, when, how?

Measurable: e.g. What will there be more of or less of?

Achievable: Can this really be accomplished?

Relevant: Is it important? Does it align with our values? Will it make a meaningful difference?

Time-based: By when do we want this to be completed?

Evaluated: Check along the way if things are working as expected?

Rewarded: How will we celebrate this goal?

Sample SMART-ER Goals - Outcome

We will have 10 Full Time Providers (or equivalent) by December 2021

By July 2021, at least 50% of our patients with Diabetes will have a Chronic Disease Plan in place

Specific
Measurable
Achievable
Relevant
Time-based
Evaluated
Rewarded

The above are *Outcome* goals. Pointing to *what*, but not the *how*

Sample SMART-ER Goals - Output

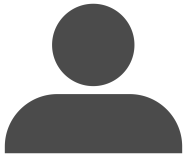
Every month we will post 2 recruitment ads to attract new providers across different platforms & evaluate success of the previous campaigns.

Every week, the nursing team will send out 10 new patient invitations to book-in for their overdue CDM service.

Specific
Measurable
Achievable
Relevant
Time-based
Evaluated
Rewarded

The above are *Output* goals.
Listing the task or actions needed

Individual goals



Clinicians should reflect on learning needs and plan/seek CPD and learning activities that help meet those needs

Administrative staff would **also benefit** from a similar approach

Individual learning needs could be around:

Clinical areas: First Aid/CPR, Immunisation, Triage, caring for patients with particular **conditions** e.g. Diabetes, Asthma, Heart Disease, etc.

Skills gap: Skills that would help with current or future role e.g. Staff **management** skills, **customer service**, **workplace training** skills, etc.

Personal development: Time management, **conflict resolution**, **communication** skills, **stress management** techniques, etc.

Practice goals

Practice goals affect the entire team and may be around:

- Improving business processes and financials
- Improving team performance
- Improving clinical outcomes and/or patient satisfaction

RACGP standards on Quality Improvement

QI1.3 ▶B Our practice uses relevant patient and practice data to improve clinical practice (eg chronic disease management, preventive health).

You must:

• Show evidence that you have conducted a **quality improvement activity, such as a PDSA cycle or clinical audit**, at least once every three years.

Accreditation standards on Quality Improvement

Criterion QI1.1 – Quality improvement activities

QI1.1 > A Our practice has **at least one team member who has the primary responsibility for leading our quality improvement** systems and processes.

QI1.1 > B Our practice **team internally shares information about quality improvement** and patient safety.

QI1.1 > C Our practice **seeks feedback from the team about our quality improvement systems** and the performance of these systems.

QI1.1 > D Our practice **team can describe areas of our practice that we have improved** in the past three years.

Source: RACGP Standards for general practices, 5th edition

https://www.racgp.org.au/running-a-practice/practice-standards/standards-5th-edition/standards-for-general-practices-5th-ed

RACGP Standards on Business Planning

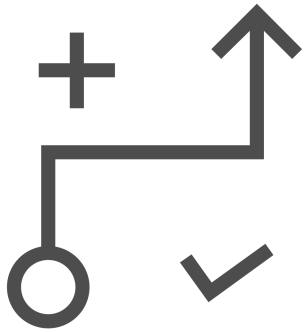
C3.1 ▶A Our practice plans and sets goals aimed at improving our services

You must:

- Plan and set business goals

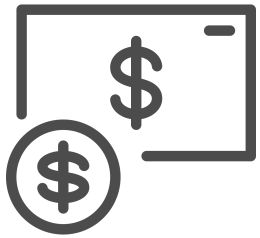
You could:

- Write a statement of the practice's ethics and values
- Maintain a business strategy
- Maintain an action plan



Planning Business and Financial Goals

Pick a priority area to focus on:



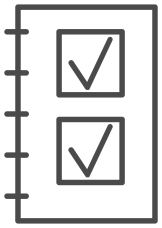
- **Practice size:**
  - Number of GPs
  - Number of patients seen (per year, quarter, month, week)
  - Number of *new* patients
  - Number of nurses
  - Number of allied health or other services
- **Patient Satisfaction & Service Quality (Reviews & Patient feedback)**
- **Practice revenue (Profit/Loss - Income/Expenses)**
  - Total revenue or total profit
  - Revenue per provider
- **Staff Retention**
  - Identifying level of staff satisfaction
  - What would be needed to improve that? (support, training, better systems/less chaos, etc)

Improving Team and Patient Satisfaction

In order to improve team and patient satisfaction:

- You'll need to know **how** they **currently feel** and **what they feel needs changing**
- Best way to find out is to **ask!**
- **Regularly use patient and team feedback** in the form of surveys, polls, and suggestion boxes
- A blank **'suggestion' sheet** in the waiting room or staff room is **rarely enough**
- Proactively **prompt for feedback** at **key times** and on **specific areas** of the practice
- **Keep a record** of both staff and patient feedback (this is an accreditation requirement under 5th Ed Standards)

What kind of business plan do I need?



- **You could create a one-page business plan or an action plan that sets out goals and progress**
- **Update or create a complete business plan or strategy document**
- **Enlist help of your existing financial advisor, accountant, bookkeeper, etc.**
- **You could do a business audit** (with your bookkeeper or accountant)
  - Get a better understanding of your profit and loss (P&L)
  - Find out your year on year profit/growth
  - Identify main sources of income
  - Where is the money going (expenses)? Is this getting worse in any area?
  - Do you have a financial leaky faucet or an untapped gold mine somewhere?

Module on Business Planning

https://practices.hotdoc.com.au/webinar/business-planning-financially-healthy/

Optimising practice systems: non-Medicare revenue

Examples of non-Medicare or private services include:

- Skin Cancer Checks
- Cosmetic injections and procedures
- Occupational Health Assessments
- Iron infusions
- Weight loss support
- Travel Medicine & Travel Vaccines

Optimising practice systems: non-Medicare revenue

Planning Goals for non-Medicare/Private services

- **Outline current costs, resources needed and revenue** of the service
- Reflect on appropriate **goals for this service for the next 6-12 months.** For example, grow the service by:
  - Boosting **marketing** efforts (Remember to always adhere to AHPRA's advertising guidelines: no testimonials, and no use of language or images that may lead patients to have unreasonable expectations of the treatment)
  - Allocating additional **staff time**
  - Creating **new collateral** e.g. patient handouts & promotional material
  - Offering **additional training** to admin and clinical staff

Other possible focus areas for Goal Setting in 2021

- **Patient satisfaction: better address patient's needs** in the current climate
- **Explore new services** your patients may benefit from
- **Covid vaccine rollout**: e.g. Smooth experience, check financial viability for your service, and/or aim for a set percentage of your existing patients to be immunised by your practice
- **Flu vaccine rollout** logistics in a year of Covid vaccinations

What's our 'coverage' rate?

Coverage is the proportion of patients eligible for a service, who are currently up to date with that service

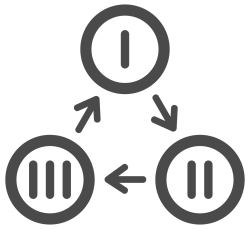
Mostly used in regards to 'immunisation coverage'

Applying the concept of 'coverage' to other practice services:

- E.g. **What proportion of our patients who are eligible** for a GP Management Plan, **have had the service** & are up to date with the relevant items?
- **Proactive patient identification & invitation**
- **Up-skill practice team** to confidently promote and/or assist with these services (where applicable)
- **Offers an easier measure of progress based on increased coverage over time**

Keep it Simple!

- Set **1 to 3 main goals** for the year
- **Break these down** into smaller targets which also serve as milestones or checkpoints to evaluate progress
- **Set monthly, fortnightly or weekly tasks** which are easy to track and that, if completed, will help you reach your targets



Where to next?

Decide on goal(s) to focus on

Decide on tasks, activities and who is responsible for these

Set timeframes for tracking progress & evaluating effectiveness

Document progress & set up an accountability process

“Goals that are not written down are just wishes.”

- Fitzhugh Dodson

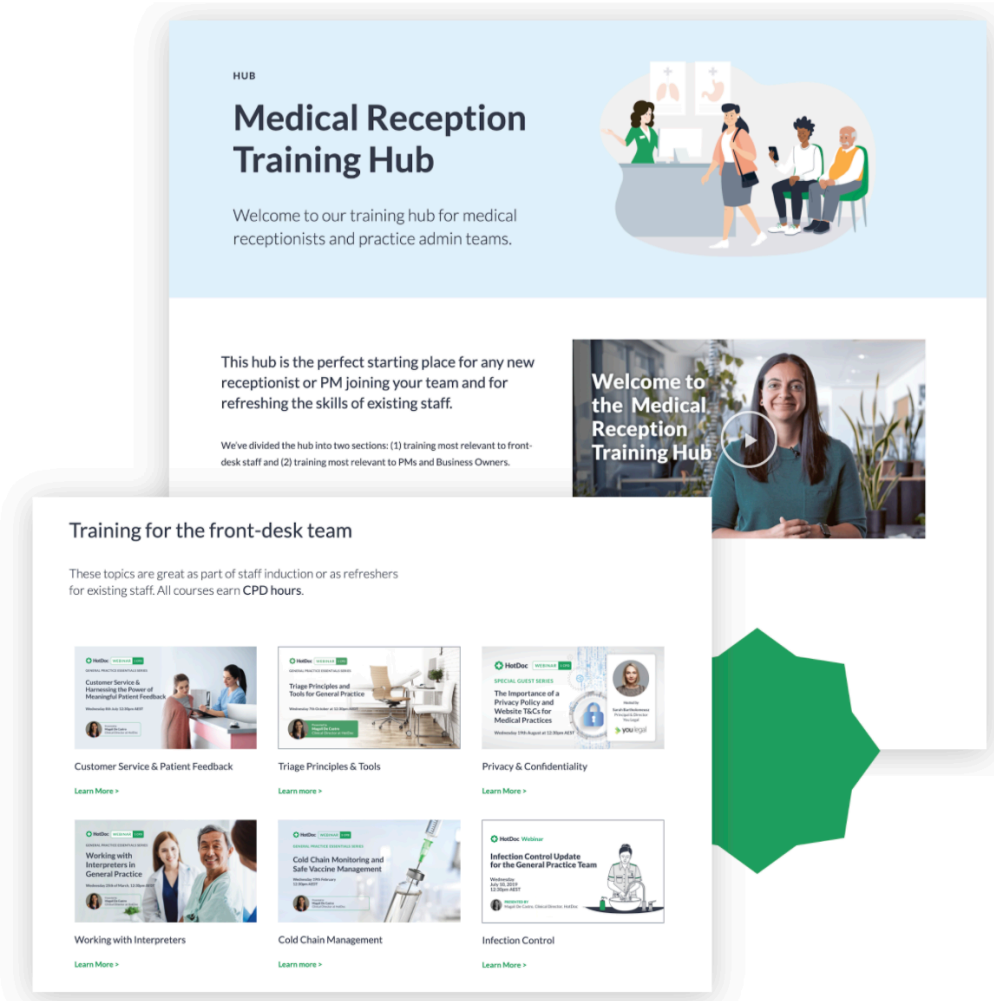
“A dream written down with a date becomes a goal.
A goal broken down into steps becomes a plan.
A plan backed by action makes your dreams come true.”

— Greg Reid

Online Resource

Medical Reception Training Hub

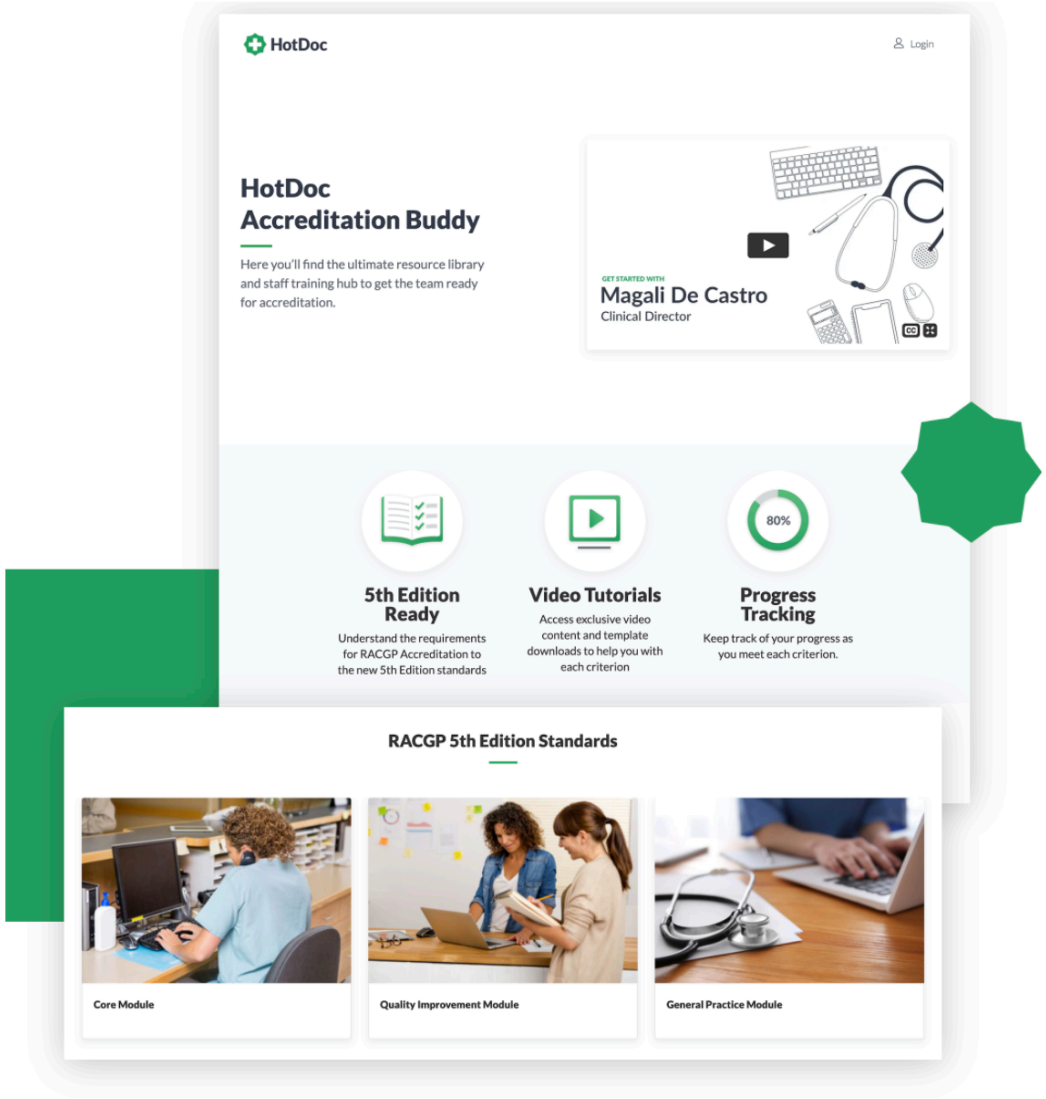
Access via -
https://practices.hotdoc.com.au/reception-training-hub/



Online Resource

Accreditation Buddy

Access via -
https://try.hotdoc.com.au/accreditation-buddy



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