

How to Improve Profit Through Client Feedback and Kaizen

For Veterinary Specialty Practice Alliance

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October 30, 2010

Note: To get a copy of the slides, please send me an email.

Loyalty Leaders are:

NPS stands for:

NPS can predict:

NPS is calculated by: % _____ minus % _____

For example: _____% minus _____% equals _____%

A 12% increase in NPS led to:

NPS scores for well known companies:

Dell:	Apple:
State Farm:	Amazon:
MSN:	Google:
Southwest Airlines:	National Average:
United:	World class:
AT&T:	Most financial institutions:

CalPro Research Benchmarks for 150+ Veterinarians & 40+ restaurants:

	Veterinarians	Restaurants
Average NPS:		
Best NPS:		
Lowest NPS:		

Restaurants that ignored NPS:

Restaurants that improved NPS:

A ranking of the top financial performing Vets matches a ranking by:

Kaizen is Japanese for:

Steps to implement Kaizen:

Elements of success

Pick two themes (or create your own) then create Action and Communication Plans for each:

- Waited too long in waiting room. The place was really busy.
- Waited a long time in exam room. I didn't know why.
- Meds cost more than if I go online or to the store.
- I felt the two tests that cost over \$95 each were unnecessary.
- Tech said too much too fast and I got confused. I wasn't sure I was doing it right when I got home.
- Doctor was in a hurry and I didn't feel understood.
- Heard a dog in another room in great pain. I was concerned but the tech did not seem to care.
- Nobody greeted me when I walked into the building. I stood there for a long time before the receptionist even looked at me. She was on the phone for a long time.
- You'd think after paying \$6400, I'd be treated differently.

Your Action and Communication Plans

From: manager@calprosurveys.com
Sent: Monday, May 25, 2009 11:10 PM
Subject: Specialty Survey Response

Survey Response: Client Survey
Response GUID: 149793bf-2ed1-4d87-815e-d13ad5504027
Started: 5/25/2009 11:03:45 PM
Completed: 5/25/2009 11:10:30 PM

Page 1

1) How satisfied were you?

Using the following scale, please rate your level of satisfaction with your most recent visit:

1. Poor
2. Fair
3. Good
4. Very Good
5. Great
6. Not Applicable (n/a)

	Satisfaction
Level of professionalism on the phone	4
Ability to get an appointment with the desired doctor/service	Great 5
Appearance and cleanliness of the facility	Great 5
Speed and convenience at check-in	3
Punctuality in meeting scheduled appointments	Great 5
Friendliness and courtesy of the receptionist	Great 5
Friendliness and courtesy of the technician	Great 5
Friendliness and courtesy of the doctor	Great 5
Appearance and professionalism of the healthcare team	Great 5
Staff's ability to answer questions and explain things clearly	Great 5
Doctor's ability to answer questions and explain things clearly	Great 5
Healthcare team treated you and your pet with compassion, respect, and care	Great 5
Speed and convenience at check-out	3
Value received for the price paid	4

2) What is the main reason for selecting this facility for your specialty needs?

Recommendation by primary-care veterinarian

3) How likely is it that you would recommend this clinic to a friend?

Please use the following scale:

0 = Definitely would NOT recommend

10 = Definitely would recommend

9

4) How likely is it that you would recommend this clinic to your primary-care veterinarian for referring

other pets in need?

Please use the following scale:

0 = Definitely would NOT recommend

10 = Definitely would recommend

9

5) Do you plan to continue bringing your pet(s) to {clinic name} if needed?

Yes

6) Would you consider bringing your pet(s) to {clinic name} for one of our other specialty/emergency services, if needed?

Yes

7) Which specialty services did your pet receive during your most recent visit?

(Please check all that apply.)

Dermatology

8) Were you requested to book a follow-up progress/recheck visit at this facility?

Yes

9) What is the status of your follow-up progress/recheck visit at this facility?

Scheduled

10) Approximately how many times in the past year did you use the services of {clinic name} specifically for specialty pet care (including this visit, but excluding purchases of food and medication refills)?

a. 1-3

11) Which doctor(s) did you see during your most recent visit?

Dr. Smith

12) Which technician(s) assisted you during your most recent visit?

Stephanie

13) Which receptionist(s) assisted you during your most recent visit?

Carol

14) Were any needed medical records provided by your primary-care veterinarian in time for your visit?

No

15) Who did we see during your most recent visit?

(Please check all that apply.)

My Dog

16) What are three things this clinic can do to better serve you?

The check-in and check-out process really needs to be updated. When we moved from across state our vet's check-in and check-out was much better. I love you guys and everyone is great. I just feel like my time is being wasted with these silly billing issues that we did not have to deal with at our last vet before we moved here. That's all. Thanks for asking!

Page 2

17) First name:

Sally

18) Last name:

Jones

19) Address:

123 Main St

20) City:

Anytown

21) State:

CA

22) Zip:

95765

23) Who is your Primary Care Veterinarian (Name, Hospital, and City)?

Dr. Smith, Vet Care, CA

24) What is your e-mail address?

We hate Spam as much as you do (unsolicited commercial e-mail). Your e-mail address will not be given out. It's that simple.

sally@jones.com

25) Would you like to receive an occasional e-mail or mailing from this clinic?

(Helpful information, clinic newsletter, service reminders for your pet, etc.)

Yes

Sample Specialty Report

CalPro Research
Client Survey Report

Clinic ID: 440
June-2010



Ratings Summary (Inception to Date)

N	Question	P	F	GD	VG	GT	NA	Graph	Red	Yellow	Green
1	Level of professionalism on the phone	3	0	24	37	168	8		1%	26%	72%
2	Ability to get an appointment with the desired doctor	0	6	13	35	172	14		3%	21%	76%
3	Appearance and cleanliness of the facility	0	0	38	16	186	0		0%	23%	78%
4	Speed and convenience at check-in	0	4	21	51	164	0		2%	30%	68%
5	Punctuality in meeting scheduled appointments	2	8	23	73	119	15		4%	43%	53%
6	Friendliness and courtesy of the receptionist	4	2	14	29	191	0		3%	18%	80%
7	Friendliness and courtesy of the technician	0	0	14	17	209	0		0%	13%	87%
8	Friendliness and courtesy of the doctor	0	0	6	7	223	4		0%	6%	94%
9	Appearance and cleanliness of the healthcare team	0	0	8	19	211	2		0%	11%	89%
10	Staff's ability to answer questions and explain things clearly	0	0	44	33	161	2		0%	32%	68%
11	Doctor's ability to answer questions and explain things clearly	0	0	50	21	165	4		0%	30%	70%
12	Healthcare team treated you and your pet with compassion and care	4	0	7	14	215	0		2%	9%	90%
13	Speed and convenience at check-out	2	0	18	43	177	0		1%	25%	74%
14	Value received for the price paid	3	4	26	89	111	7		3%	49%	48%

Please contact your Pfizer rep if you have any questions or need assistance. You may also contact us at 916-435-9196 or via email at info@calproresearch.com

Net Promoter Score

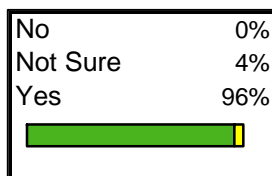
Detractors	2%
Passives	14%
Promoters	85%
NPS	83%

Key:

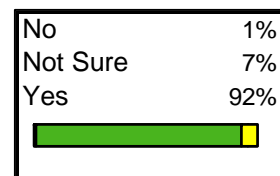
Red: P = Poor, F = Fair
 Yellow: GD = Good, VG = Very Good
 Green: GT = Great
 NA = Not Applicable

Customer Intentions

Do you plan to continue bringing your pet(s) to this clinic?



Would you consider bringing your pet(s) to see one of the other specialty/emergency services, if needed?



Sample Specialty Report

CalPro Research

Client Survey Report

June-2010



Response Counts (Inception to Date)

Approximately how many times in the past year did you use the services of...

Frequency_Of_Visit	Responses
a. 1-3	175
b. 4-6	50
c. 7-9	0
d. 10+	15

Who did we see during your most recent visit?

Pet_Type	Responses
Cat	30
Dog	210
Other	0

What is the main reason for selecting this facility for your specialty needs? (Top 5 Displayed)

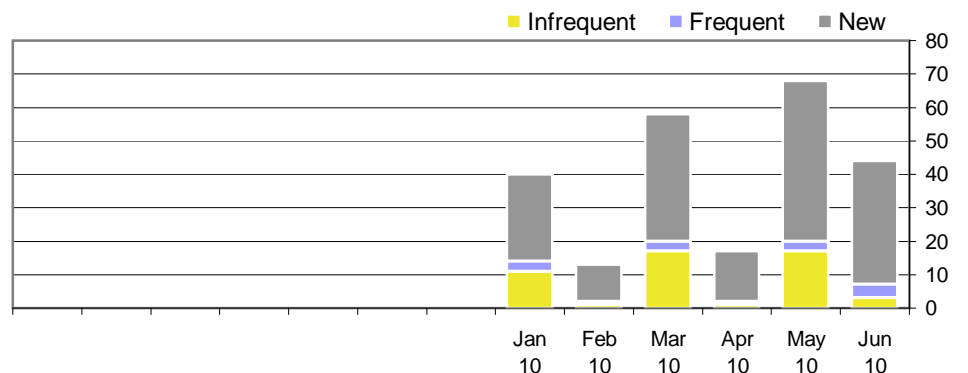
Selection_Reason	Responses
Recommendation by primary-care veterinarian	165
Prior experience with facility/specialists	50
Reputation of facility/specialists	11
Recommendation by friends/family	7
Other	7

Email Opt-Ins



Email Opt-Ins: 124

Response Count - by Frequency of Visit



Total Survey Responses: 240

Patient Care Summary (Inception to Date)

Which specialty services did your pet receive during your most recent visit? (Top 5 Answers)

Services_Used	Responses
Dermatology	43
Neurology	29
Oncology	26
Internal Medicine	23
Surgery	21

Were you requested to book a follow-up progress/recheck visit at this facility?

Book_FollowUp	Responses
Yes	177
No	55

What is the status of your follow-up progress/recheck visit at this facility?

Recheck_status	Responses
Scheduled	105
Not yet scheduled	82
Not needed	34

Which doctor(s) did you see during your most recent visit? (Top 5 Answers)

Doc_Seen	Responses
Dr. Fourth	73
Dr. Jones	53
Dr. Smith	42
Dr. Taylor	33
Dr. West	26

Patient Care Summary (Inception to Date)

Which technician(s) assisted you during your most recent visit? (Top 5 Answers)

Technician	Responses
Not sure	122
Katie	36
Bobby	27
Phil	20
Amanda	18

Which receptionist(s) assisted you during your most recent visit? (Top 5 Answers)

Receptionist	Responses
Not sure	216
Janette	14
John	8
Carrie	2

Were any needed medical records provided by your primary-care veterinarian in time for your visit?

Records_Needed	Responses
Yes	148
No	69
Not Sure	23




Who is your Primary Care Veterinarian (Name, Hospital, and City)? (Top 5 Answers)

Primary_Care	Responses
Castle Peak Vet Clinic	29
"Dr. Susan, Angel Small Animal Hospital"	26
KW Wellness Center	26
Broadway Clinic / Dr Gina Miller	25
Baton Veterinary Clinic - Dr. Sparks	24

Ratings Summary (Current Month)

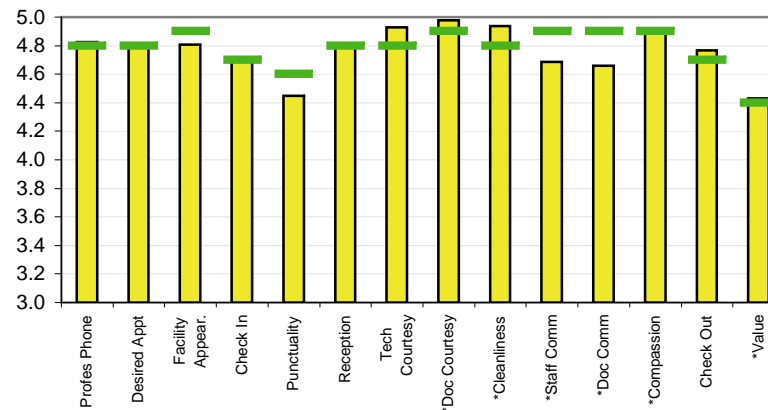
N	Question	P	F	GD	VG	GT	NA	Graph	Red	Yellow	Green
1	Level of professionalism on the phone	0	0	0	2	42	0		0%	5%	95%
2	Ability to get an appointment with the desired doctor	0	0	0	7	34	3		0%	17%	83%
3	Appearance and cleanliness of the facility	0	0	3	3	38	0		0%	14%	86%
4	Speed and convenience at check-in	0	0	2	4	38	0		0%	14%	86%
5	Punctuality in meeting scheduled appointments	0	1	2	18	20	3		2%	49%	49%
6	Friendliness and courtesy of the receptionist	0	0	0	4	40	0		0%	9%	91%
7	Friendliness and courtesy of the technician	0	0	0	1	43	0		0%	2%	98%
8	Friendliness and courtesy of the doctor	0	0	0	0	43	1		0%	0%	100%
9	Appearance and cleanliness of the healthcare team	0	0	0	1	43	0		0%	2%	98%
10	Staff's ability to answer questions and explain things clearly	0	0	3	4	37	0		0%	16%	84%
11	Doctor's ability to answer questions and explain things clearly	0	0	6	0	37	1		0%	14%	86%
12	Healthcare team treated you and your pet with compassion and care	0	0	0	0	44	0		0%	0%	100%
13	Speed and convenience at check-out	0	0	1	3	40	0		0%	9%	91%
14	Value received for the price paid	0	0	2	18	24	0		0%	45%	55%

Key:

 Red: P = Poor, F = Fair
 Yellow: GD = Good, VG = Very Good
 Green: GT = Great
 NA = Not Applicable

Survey Category Summary - Current Quarter

	Rating	Goal
Profes Phone	4.8	4.8
Desired Appt	4.8	4.8
Facility Appear.	4.8	4.9
Check In	4.7	4.7
Punctuality	4.5	4.6
Reception	4.8	4.8
Tech Courtesy	4.9	4.8
*Doc Courtesy	5.0	4.9
*Cleanliness	4.9	4.8
*Staff Comm	4.7	4.9
*Doc Comm	4.7	4.9
*Compassion	4.9	4.9
Check Out	4.8	4.7
*Value	4.4	4.4



The graph to the left shows your current month ratings relative to the goals we have established. The goals were set based on a correlation analysis of top rated specialty clinics based on their NPS scores. The graphs below show 12 month trends. The charts show the Y-axis scale from 3 to 5. Ratings below 3 indicate significant customer dissatisfaction which can be further investigated upon request. (An * indicates a high correlation item.)

Please contact us at 916-435-9196 or via email at info@calproresearch.com if you have any questions or need assistance.

Survey Category 12 Month Trends

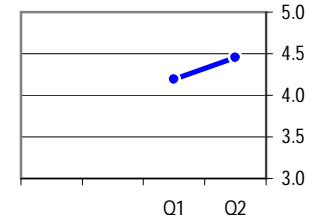
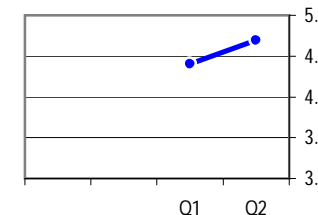
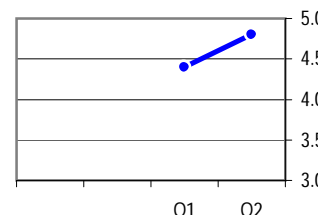
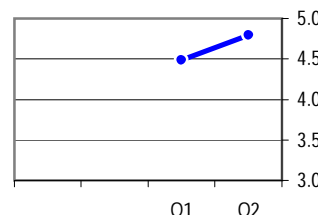
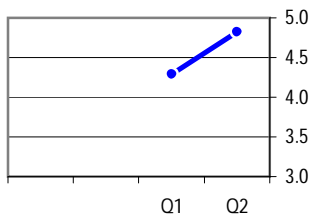
Profes Phone

Desired Appt

Facility Appear.

Check In

Punctuality



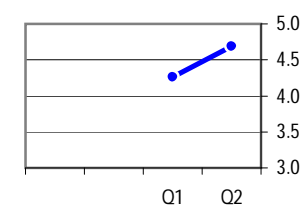
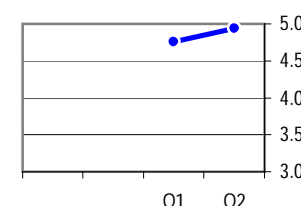
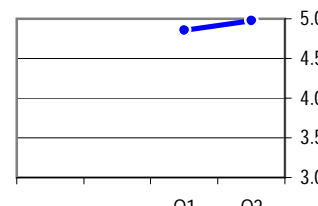
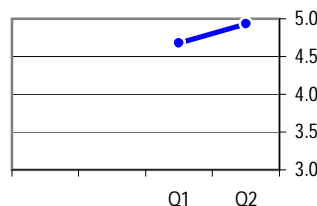
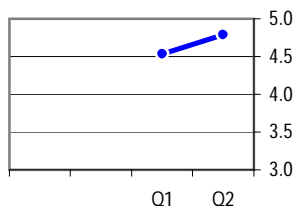
Reception

Tech Courtesy

*Doc Courtesy

*Cleanliness

*Staff Comm

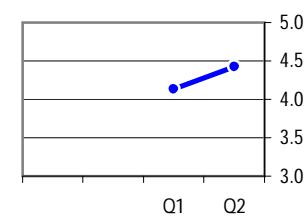
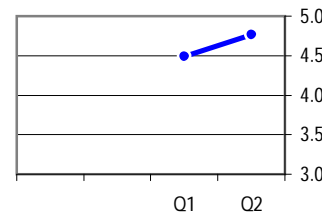
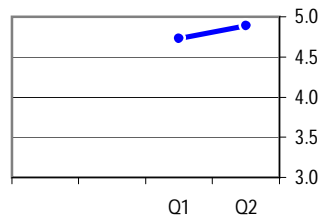
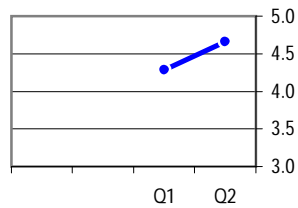


*Doc Comm

*Compassion

Check Out

*Value



Comparison to Top Clinic Composite Profile (Goal) Based on Correlation Analysis

	Profes Phone	Desired Appt	Facility Appear.	Check In	Punctuality	Reception	Tech Courtesy	*Doc Courtesy	*Cleanliness	*Staff Comm	*Doc Comm	*Compassion	Check Out	*Value
Goal	4.8	4.8	4.9	4.7	4.6	4.8	4.8	4.9	4.8	4.9	4.9	4.9	4.7	4.4
Correlation	45%	44%	43%	40%	42%	36%	47%	59%	53%	57%	64%	63%	42%	60%
Current Qtr	4.8	4.8	4.8	4.7	4.5	4.8	4.9	5.0	4.9	4.7	4.7	4.9	4.8	4.4
Prior Qtr	4.3	4.5	4.4	4.4	4.2	4.5	4.7	4.9	4.8	4.3	4.3	4.7	4.5	4.1

Distance to Goal

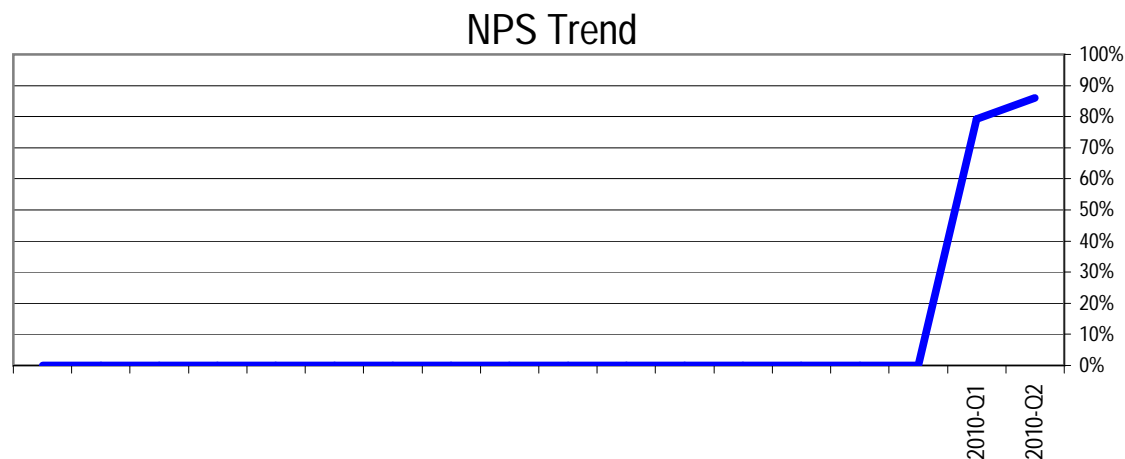
Current Qtr	OK	OK	OK	OK	0.1	OK	OK	OK	OK	0.2	0.2	OK	OK	OK
Prior Qtr	0.5	0.3	0.5	0.3	0.4	0.3	0.1	OK	OK	0.6	0.6	0.2	0.2	0.3

Notes:

1. Items highlighted in yellow are the highest correlation to improving your Net Promoter Score.
2. Mathematical errors less than .1 are due to rounding.

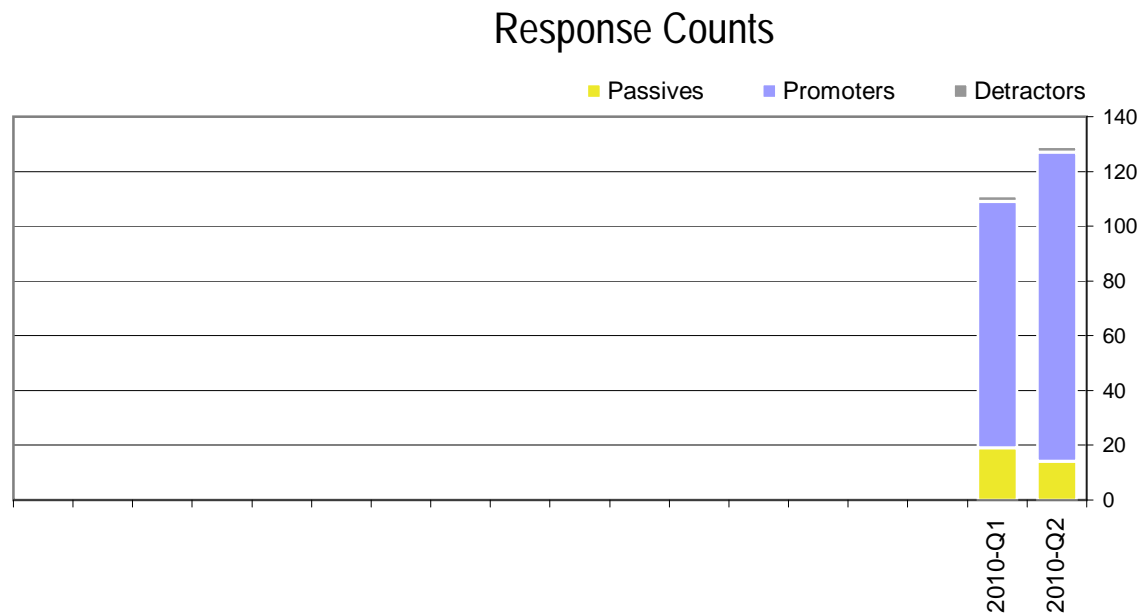
Please call us at 916-435-9196 x111 if you have any questions on these reports.

Net Promoter Score Trend



Your **Net Promoter Score (NPS)** is a predictive measurement of repeat and referral business. Take this measurement very seriously and strategically decide with your team ways of continuously improving your NPS score. We have a video on the financial implications of your NPS score. Be sure to watch this video at www.calproresearch.com.

Please contact us 916-435-9196 or via email at info@calproresearch.com if you have any questions or need assistance.



Total Responses To Date	240
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Survey	Primary Care	Services	Freq	Comments	Rating
6/1/2010	Urban Vet Care	Dermatology	a. 1-3	"Do a reminder call the day before, especially when there are specific instructions such as not feeding dog after a certain time."	10.0
6/1/2010	DRAnimal Hospital Ü[•^çä	Neurology	a. 1-3	"Maybe explain things a little slower. It was an awful lot of information and I was pretty upset finding out my dog had cancer and needed surgery. Upon check out it would have been nice to know that I was getting charged \$45 for one pill (chemo). I was provided a prescription that was easily filled that same day at a much cheaper pharmacy so it really wasn't even necessary to send one home with me. Seems petty to complain about \$45 when my total bill was around \$7600, but it seems the meds as a whole were way too expensive. "	10.0
6/1/2010	Dax Animal Hospital Ü[•^çä	Neurology	a. 1-3	"Maybe explain things a little slower. It was an awful lot of information and I was pretty upset finding out my dog had cancer and needed surgery. Upon check out it would have been nice to know that I was getting charged \$45 for one pill (chemo). I was provided a prescription that was easily filled that same day at a much cheaper pharmacy so it really wasn't even necessary to send one home with me. Seems petty to complain about \$45 when my total bill was around \$7600, but it seems the meds as a whole were way too expensive. "	10.0
6/2/2010	"Dr. Susan, Small Animal Hospital"	Cardiology	a. 1-3	cant think of anything	10.0
6/2/2010	Castle Peak Vet Clinic	Dermatology	a. 1-3	So far the staff provided me with the many questions I had about my pets allergies and skin irritations. Was impressed with the operation and thought the parking access was impressive as well.	10.0
6/2/2010	"Dr. Susan, Small Animal Hospital"	Cardiology	a. 1-3	cant think of anything	10.0
6/3/2010	"Dr. Susan, Small Animal Hospital"	Ophthalmology	b. 4-6	Have packages of the dog treats you provide available for purchase.Turn up the volume on the DVD a tad.	10.0
6/3/2010	ÄW Wellness Center	Dermatology	a. 1-3	Lower the charges a little.	10.0
6/3/2010	"Dr. Susan, Small Animal Hospital"	Internal Medicine	a. 1-3	nothing	10.0
6/3/2010	"Dr. Susan, Small Animal Hospital"	Ophthalmology	b. 4-6	Have packages of the dog treats you provide available for purchase.Turn up the volume on the DVD a tad.	10.0
6/3/2010	ÄW Wellness Center	Dermatology	a. 1-3	Lower the charges a little.	10.0
6/4/2010	DRAnimal Hospital Ü[•^çä	Emergency Services	a. 1-3	"The are the best! They have helped my dog twice with swallowing the wrong things, once required a stay. Luckily, this time did not. She has had cataract surgery about 1.5 years ago and that entire team is wonderful. "	10.0
6/4/2010	DRAnimal Hospital Ü[•^çä	Emergency Services	a. 1-3	"The are the best! They have helped my dog twice with swallowing the wrong things, once required a stay. Luckily, this time did not. She has had cataract surgery about 1.5 years ago and that entire team is wonderful. "	10.0
6/4/2010	DRAnimal Hospital Ü[•^çä	Emergency Services	a. 1-3	"The are the best! They have helped my dog twice with swallowing the wrong things, once required a stay. Luckily, this time did not. She has had cataract surgery about 1.5 years ago and that entire team is wonderful. "	10.0

Survey	Primary_Care	Services	Freq	Comments	Rating
6/5/2010 Main•	Animal Clinic	Emergency Services	a. 1-3	"I trust our vet, and it looks like he was right yet again. Unfortunately, my check in on night two was super slow, but it was no fault of anyone's; the girl next to me said the parking lot was completely full when she got there, so you can't help too busy. I could do with a smaller bill next time, but I won't hold my breath :-)"	8.0
6/5/2010/5^Áa^ÚPOZ~~~~~	Animal Hospital	Neurology	a. 1-3	Increase the speed of getting into a room. There was a significant wait (15 minutes or more after checking in at the front desk).Discuss/offer payment options while discussing the cost of a procedure.	8.0
6/28/2010 DRAnimal Hospital Úæ!æ ^} q	Animal Hospital	Dermatology	b. 4-6	"more open appt times, better on time, cheaper prices"	8.0

Sum of responses			Frequency_group			
Zip_Code	City	State	Frequent	Infrequent	New	Grand Total
95765	ROCKLIN	CA		16	46	62
95610	CITRUS HEIGHTS	CA		17	44	61
94203	SACRAMENTO	CA		7	54	61
95661	ROSEVILLE	CA	15	10	31	56
Grand Total			15	50	175	240

Survey	First_Name	Last_Name	Address	City	State	Zip_Code	Email_Address	Receive_Emails
6/1/2010	Amanda	Smith	9600 South Way	ROSEVILLE	CA	95661	aaaa@aol.com	Yes
6/1/2010	Michele	Miller	2000 East Ave	CITRUS HEIGHTS	CA	95610	cccc@comcast.com	Yes
6/1/2010	Michele	Miller	2000 East Ave	CITRUS HEIGHTS	CA	95610	cccc@comcast.com	Yes
6/2/2010	andrea	Nguyen	5000 Northgate Dr.	ROCKLIN	CA	95765	hhhh@hotmail.com	Yes
6/2/2010	Bruce	Nguyen	5000 Northgate Dr.	SACRAMENTO	CA	94203	hhhh@hotmail.com	Yes
6/2/2010	andrea	Nguyen	5000 Northgate Dr.	ROCKLIN	CA	95765	hhhh@hotmail.com	Yes
6/2/2010	Bruce	Nguyen	5000 Northgate Dr.	SACRAMENTO	CA	94203	hhhh@hotmail.com	Yes
6/3/2010	Patricia	Nguyen	5000 Northgate Dr.	ROSEVILLE	CA	95661	hhhh@hotmail.com	No
6/3/2010	Cathy	Jones	8000 Main St	CITRUS HEIGHTS	CA	95610	yyyy@yahoo.com	No
6/3/2010	Christel	Nguyen	5000 Northgate Dr.	ROCKLIN	CA	95765	hhhh@hotmail.com	No
6/3/2010	Patricia	Nguyen	5000 Northgate Dr.	ROSEVILLE	CA	95661	hhhh@hotmail.com	No
6/3/2010	Cathy	Jones	8000 Main St	CITRUS HEIGHTS	CA	95610	yyyy@yahoo.com	No
6/3/2010	Christel	Nguyen	5000 Northgate Dr.	ROCKLIN	CA	95765	hhhh@hotmail.com	No
6/4/2010	Sherri	Jones	8000 Main St	SACRAMENTO	CA	94203	yyyy@yahoo.com	No
6/4/2010	Jody	Miller	2000 East Ave	CITRUS HEIGHTS	CA	95610	cccc@comcast.com	Yes
6/4/2010	Jody	Miller	2000 East Ave	CITRUS HEIGHTS	CA	95610	cccc@comcast.com	Yes
6/4/2010	Sherri	Jones	8000 Main St	SACRAMENTO	CA	94203	yyyy@yahoo.com	No
6/4/2010	Jody	Miller	2000 East Ave	CITRUS HEIGHTS	CA	95610	cccc@comcast.com	Yes
6/5/2010	Lori	Johnson	4000 West Blvd	ROCKLIN	CA	95765	gggg@gmail.com	No
6/5/2010	Kristin	Smith	9600 South Way	SACRAMENTO	CA	94203	aaaa@aol.com	No
6/5/2010	Lori	Johnson	4000 West Blvd	ROCKLIN	CA	95765	gggg@gmail.com	No
6/5/2010	Kristin	Smith	9600 South Way	SACRAMENTO	CA	94203	aaaa@aol.com	No
6/5/2010	Lori	Johnson	4000 West Blvd	ROCKLIN	CA	95765	gggg@gmail.com	No
6/5/2010	Kristin	Smith	9600 South Way	SACRAMENTO	CA	94203	aaaa@aol.com	No
6/6/2010	Becki	Jones	8000 Main St	ROSEVILLE	CA	95661	yyyy@yahoo.com	No
6/6/2010	JUDITH	Smith	9600 South Way	CITRUS HEIGHTS	CA	95610	aaaa@aol.com	Yes
6/6/2010	Becki	Jones	8000 Main St	ROSEVILLE	CA	95661	yyyy@yahoo.com	No
6/6/2010	JUDITH	Smith	9600 South Way	CITRUS HEIGHTS	CA	95610	aaaa@aol.com	Yes
6/6/2010	Becki	Jones	8000 Main St	ROSEVILLE	CA	95661	yyyy@yahoo.com	No
6/6/2010	JUDITH	Smith	9600 South Way	CITRUS HEIGHTS	CA	95610	aaaa@aol.com	Yes
6/7/2010	Jennifer	Nguyen	5000 Northgate Dr.	ROCKLIN	CA	95765	hhhh@hotmail.com	Yes
6/7/2010	JUDITH	Johnson	4000 West Blvd	SACRAMENTO	CA	94203	gggg@gmail.com	Yes
6/7/2010	Jennifer	Nguyen	5000 Northgate Dr.	ROCKLIN	CA	95765	hhhh@hotmail.com	Yes
6/7/2010	Jennifer	Nguyen	5000 Northgate Dr.	ROCKLIN	CA	95765	hhhh@hotmail.com	Yes
6/7/2010	JUDITH	Johnson	4000 West Blvd	SACRAMENTO	CA	94203	gggg@gmail.com	Yes
6/7/2010	Debbie	Miller	2000 East Ave	ROSEVILLE	CA	95661	cccc@comcast.com	No
6/26/2010	Helen	Johnson	4000 West Blvd	ROCKLIN	CA	95765	gggg@gmail.com	Yes
6/27/2010	Andrew	Miller	2000 East Ave	SACRAMENTO	CA	94203	cccc@comcast.com	No
6/27/2010	Lance	Jones	8000 Main St	ROSEVILLE	CA	95661	yyyy@yahoo.com	No
6/28/2010	Gail	Smith	9600 South Way	CITRUS HEIGHTS	CA	95610	aaaa@aol.com	No
6/28/2010	Ruben	Miller	2000 East Ave	ROCKLIN	CA	95765	cccc@comcast.com	No

September-10

Clinic Benchmarking Report

Notes:

Net Promoter Score (NPS) = % Very Sat. minus % Dissat.
Clinics with less than 50 responses are not included. (30 for Referral.)

Questions?

Please contact Larry Hill at 916-435-9196 x111 or via email
at info@calproresearch.com

Avg NPS = 79% Min / Max NPS: 37% 96%

Clinic State	Clinic ID	Dissatisfied	Satisfied	Very Satisfied	NPS	Type
AZ	378	3%	13%	84%	81%	GP
	448	2%	12%	85%	83%	Referral
CA	301	1%	11%	87%	86%	GP
	303	1%	19%	80%	79%	GP
	305	3%	32%	65%	62%	GP
	311	2%	11%	87%	85%	GP
	342	13%	17%	70%	57%	GP
	363	1%	29%	70%	69%	GP
	449	2%	6%	92%	90%	Referral
	469	3%	7%	90%	87%	Referral
CO	434	6%	11%	84%	78%	Referral
	456	5%	14%	81%	76%	Referral
D.C.	433	8%	14%	78%	70%	GP
	463	7%	20%	73%	65%	GP
DE	331	8%	13%	79%	71%	GP
FL	466	1%	1%	97%	96%	Equine
	473	2%	7%	90%	88%	Equine
	474	0%	7%	93%	93%	GP
	475	3%	8%	89%	86%	Referral
GA	422	10%	11%	79%	69%	GP
IL	343	0%	12%	88%	88%	GP
	347	1%	5%	93%	92%	GP
	352	2%	12%	86%	84%	GP
	355	0%	6%	93%	93%	GP
	356	1%	12%	87%	86%	GP
	359	0%	8%	92%	92%	GP
	360	0%	7%	93%	93%	GP
	364	4%	14%	82%	77%	GP
	367	1%	11%	88%	87%	GP
	372	3%	15%	82%	79%	GP
	438	8%	10%	83%	75%	Referral
	445	7%	7%	86%	80%	Referral
	447	6%	12%	82%	76%	Referral
	381	2%	11%	88%	86%	GP
	425	6%	10%	84%	78%	GP
KS	482	3%	13%	85%	82%	GP
	484	3%	5%	92%	89%	GP
MA	370	2%	16%	82%	80%	GP
	374	2%	6%	92%	90%	GP
	395	3%	23%	75%	72%	GP
	444	6%	14%	80%	73%	Referral

Clinic Benchmarking Report

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Avg NPS = 79% Min / Max NPS: 37% 96%

Clinic State	Clinic ID	Dissatisfied	Satisfied	Very Satisfied	NPS	Type
MD	325	3%	12%	85%	82%	GP
	326	0%	10%	90%	90%	GP
	327	3%	25%	72%	70%	GP
	348	2%	12%	86%	85%	GP
	400	3%	16%	81%	78%	GP
	404	6%	19%	74%	68%	GP
	406	3%	13%	85%	83%	GP
	407	3%	12%	85%	82%	GP
	417	6%	11%	83%	78%	GP
	423	7%	16%	76%	69%	GP
	426	1%	5%	94%	93%	GP
	452	4%	19%	77%	73%	GP
	464	1%	11%	88%	87%	GP
	465	2%	13%	85%	84%	GP
	470	3%	15%	81%	78%	GP
ME	411	3%	13%	84%	81%	GP
MI	393	1%	14%	85%	85%	GP
	427	4%	17%	79%	75%	GP
MN	462	4%	9%	87%	84%	Equine
MO	328	0%	12%	88%	88%	GP
	483	4%	7%	89%	85%	GP
	487	1%	5%	94%	93%	GP
	488	4%	15%	81%	78%	GP
	494	3%	3%	94%	91%	GP
MT	457	3%	2%	95%	92%	Equine
NC	299	1%	15%	85%	84%	GP
	300	3%	32%	65%	62%	GP
NJ	339	0%	10%	90%	90%	GP
	365	5%	22%	73%	68%	GP
	371	0%	27%	73%	73%	GP
	373	10%	24%	66%	56%	GP
	380	2%	7%	91%	89%	GP
	383	5%	28%	67%	62%	GP
	410	2%	9%	89%	88%	GP
	416	20%	22%	57%	37%	GP
NV	302	3%	13%	85%	82%	GP
	467	3%	6%	91%	88%	Referral
NY	436	10%	4%	85%	75%	Referral
	453	6%	8%	86%	79%	Referral
	468	7%	8%	85%	78%	Referral
OH	419	5%	12%	83%	78%	GP
	446	11%	5%	84%	72%	Referral
	472	5%	11%	85%	80%	GP
OR	392	9%	29%	62%	53%	GP
RI	408	2%	15%	84%	82%	GP
SC	298	4%	14%	82%	78%	GP
	334	0%	16%	84%	84%	GP

Clinic Benchmarking Report

Notes:

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Questions?

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Avg NPS = 79% Min / Max NPS: 37% 96%

Clinic State	Clinic ID	Dissatisfied	Satisfied	Very Satisfied	NPS	Type
TN	486	2%	12%	86%	84%	Referral
	458	2%	10%	89%	87%	GP
VA	368	8%	22%	70%	62%	GP
	369	1%	9%	90%	89%	GP
	375	7%	18%	75%	67%	GP
	377	2%	10%	88%	86%	GP
	396	8%	26%	66%	58%	GP
	398	2%	12%	86%	84%	GP
	401	2%	12%	86%	84%	GP
	405	6%	15%	78%	72%	GP
	413	1%	11%	88%	87%	GP
	418	6%	20%	73%	67%	GP
	420	4%	20%	76%	71%	GP
	439	8%	7%	85%	77%	Referral
	440	5%	7%	88%	83%	Referral
	451	3%	8%	90%	88%	Referral
	459	4%	11%	85%	82%	Equine
	461	2%	7%	91%	89%	Equine
	478	12%	10%	78%	66%	GP
	479	4%	14%	82%	78%	GP
	481	3%	14%	83%	80%	GP
WA	389	0%	10%	90%	90%	GP
	428	4%	20%	76%	73%	GP
	429	11%	11%	79%	68%	GP
	437	5%	10%	85%	79%	Referral
WI	443	8%	13%	79%	71%	Referral
WV	414	1%	6%	93%	91%	GP

Top 3 Referral Clinics based on NPS and more than 100 survey responses.

SHL	Clinic	Clinic_ID	Phone	Appointment	Appearance	Check_In	Punctuality	Reception	Technician	Doc_Court	Cleanliness	Staff_Comm	Doc_Comm	Compassion	Check_Out	Value	NPS_Score	Responses
Undisclosed	Undisclosed	449	4.86	4.88	4.93	4.76	4.71	4.85	4.93	4.95	4.94	4.86	4.93	4.94	4.65	4.54	90%	617
Undisclosed	Undisclosed	467	4.75	4.83	4.89	4.75	4.52	4.81	4.84	4.92	4.88	4.84	4.91	4.89	4.77	4.44	89%	272
Undisclosed	Undisclosed	440	4.68	4.76	4.88	4.68	4.54	4.81	4.85	4.86	4.86	4.74	4.80	4.82	4.67	4.29	82%	217
	<i>Average Top Scores</i>		4.76	4.82	4.90	4.73	4.59	4.83	4.87	4.91	4.89	4.82	4.88	4.88	4.70	4.42	87%	
	<i>Range</i>		0.18	0.12	0.04	0.08	0.19	0.04	0.09	0.09	0.07	0.12	0.12	0.11	0.13	0.25	8%	

Bottom 3 Referral Clinics based on NPS and more than 30 survey responses.

SHL	Clinic	C	P	A	A	C	P	R	T	D	C	S	D	C	C	V	N	R
Undisclosed	Undisclosed	446	4.74	4.89	4.59	4.51	4.53	4.74	4.73	4.71	4.76	4.60	4.61	4.64	4.62	4.26	68%	76
Undisclosed	Undisclosed	443	4.81	4.87	5.00	4.74	4.68	4.81	4.83	4.73	4.88	4.87	4.77	4.75	4.42	4.31	71%	48
Undisclosed	Undisclosed	444	4.72	4.76	4.76	4.73	4.59	4.84	4.81	4.75	4.85	4.74	4.72	4.73	4.45	4.10	74%	188
	<i>Average Bottom Scores</i>		4.76	4.84	4.78	4.66	4.60	4.80	4.79	4.73	4.83	4.74	4.70	4.71	4.50	4.22	71%	
	Difference in averages		0.00	-0.01	0.12	0.07	-0.01	0.03	0.08	0.18	0.07	0.08	0.18	0.17	0.20	0.20		

Goals

	C	P	A	A	C	P	R	T	D	C	S	D	C	C	V	N	R
Goal		4.80	4.80	4.90	4.70	4.60	4.80	4.80	4.90	4.80	4.90	4.90	4.90	4.70	4.40	90%	
Correlation to NPS		45%	44%	43%	40%	42%	36%	47%	59%	53%	57%	64%	63%	42%	60%		

How To Create An Action And Communication Plan

By Larry Hill, Principal, CalPro Research
October 2008

What is an Action and Communication plan? How do you write one, and why should you bother? Do you feel overworked and under-funded? (Most of us do.) You have a right to ask whether the work involved in developing a plan is worth it. The answer is “yes” because a written communication plan will:

- ✓ Give your day-to-day work more focus.
- ✓ Help you set priorities.
- ✓ Provide you with a sense of order and control.
- ✓ Help get other leaders and staff to support your goals.
- ✓ Protect you against last-minute, seat-of-the-pants demands.
- ✓ Prevent you from feeling overwhelmed.
- ✓ Give you peace of mind.

An Action and Communication plan is a written document that describes:

- ✓ What you want to accomplish with your organization (your goals).
- ✓ To whom your communications will be addressed (your audience).
- ✓ How you will communicate your goals (the tools and timetable).
- ✓ How you will measure the results of your goals (evaluation).

Create Your Action Plan.

Define SMART goals. Define your overall objectives-the results you want to achieve. Be sure these are SMART. That means that they are specific, measurable, attainable, realistic and timely. Quite often a company’s internal language is used. That is OK as long as the team understands the terms. Some examples of SMART goals are:

- ✓ Improve customer satisfaction by 5% by the end of the fiscal year through training front-line employees in our “top five”.
- ✓ Increase employee teamwork by 10% by following our new “communication process” and measure the results via our next employee survey.
- ✓ Improve on-time deliveries by 3% by the 2nd quarter through weekly Pareto analysis and corrective action.
- ✓ Improve visibility of the company by implementing our “Bigger and Best” ad campaign by the end of this quarter.

Assign Ownership. There should be one person responsible for each SMART goal. Many teams are tempted to put two or more people as co-owners of a goal. This rarely works out. It is better to have one person be the responsible party and identify others as resources.

Define Resources. Resources are anything that is needed to accomplish the goal. They can be people, funds, computers, equipment, etc. Define the key resources needed only to avoid unnecessary details.

Create Your Communication Plan.

Define audiences. List all the audiences that you need to keep informed, attempt to influence, or serve.

Define methods. List how you will communicate with each person or group. This can be email, in-person, letters or other forms of communication.

Establish a timetable. Once goals, audiences, and methods have been identified, establish when and how often you will communicate (e.g., monthly, weekly, etc. or specifically like a specific date or event such as “after product release”).

Evaluate and communicate the results. Build into your plan a method for measuring and communicating results. Your evaluation might take the form of:

- ✓ A monthly report on work in progress,
- ✓ Formalized department reports for presentation at staff meetings,
- ✓ Periodic briefings for executive staff and/or department heads, etc.

Summarize The Plans

Developing a written Action and Communication plan will take effort. Once in place, the written plan will smooth out your job, earn you more respect, help you and your team set work priorities, protect you from last-minute demands, and bring order to your chaotic job. When you are done you can create a summary Action Plan Matrix and Communications Matrix such as the ones below.

Action Plan Matrix

SMART Goal	Owner	Key Resources	Timing
Improve customer satisfaction by 5% through training front-line employees in our “top five”.	Steve	Bob, Julie, Budget of 20K	End of Fiscal Year
Increase employee teamwork by 10% by following our new “communication process”	Bob	Kathy, George, Steve	Measure the results via our next employee survey.
Improve on-time deliveries by 3% through weekly Pareto analysis and corrective action.	Kathy	Bob, Julie	End of Q2

Communication Plan Matrix

Audience	Message	Method	Timing/Frequency
Project Team	Details; Task-related; Project progress	Team meetings, task-related meetings; Individual meetings; Task/review-specific email	Regularly-scheduled team meetings (2/mo); And as needed
Project Steering Team	Policy-related issues; Project progress	Summary via email; Discussion via team meetings	Regularly-scheduled team meetings (1/mo); And as needed
Sales Team	Summary of goal; updates	Email	1/month

Tips To Remember

When developing your plan, keep the following tips in mind:

- ✓ Consider all of your audiences as "customers."
- ✓ Build in a sense of involvement.
- ✓ Use the plan to move the organization forward.
- ✓ Keep it manageable and up-beat
- ✓ Acknowledge significant milestones as they are accomplished
- ✓ Allow the completed plan to be used as a marketing tool for group presentations, discussion starters, etc.

Tips for Communicating Change

- ✓ Ask people for their opinion before you implement change.
- ✓ Be so familiar with what you are communicating that you can summarize it in a short sentence.
- ✓ Explain the change in language people understand.
- ✓ Explain the change in terms of how it will affect them.
- ✓ Explain the reasons why the change is important.
- ✓ Anticipate how people will react, the questions they'll raise and the issues that may result.
- ✓ Design your communication to answer those concerns immediately.
- ✓ Keep people up-to-date regularly.
- ✓ Expect the change to generate a group of "resisters" and appreciate them.
- ✓ Encourage resisters to participate in the implementation of the change and listen to what they have to say.
- ✓ Solicit ideas that will strengthen what you want to do.
- ✓ Identify the people who you can go to for advice and feedback.
- ✓ Be direct in stating the change and explaining the rationale for the change in relation to the overall goals you wish to achieve.
- ✓ Keep communicating about the change after it has been made. Recognize and celebrate its successful implementation.
- ✓ Make sure your people know what is going on. It's demoralizing to hear about what's happening within your team from someone on the outside.

Benefits

Simply by having an Action Plan and a Communication Plan you can have the following benefits:

- ✓ Acts as a binding agreement. When you tell people you're going to do something, having a communication plan or commitment in writing will force you to carry through with your efforts and you will have given others the opportunity to provide you with input.
- ✓ Helps ensure that you will take advantage of all opportunities, including on-going implementation.
- ✓ Helps keep communication focused.
- ✓ Helps prevent unwanted surprises.

I trust you will find this information helpful and I wish you all the best in your planning and communication efforts.

Larry