

Start Time	Stop Time	Instructor	Title
Pre-Workshop 1 (virtual)			
30 min		BR	Program overview: curriculum review, process, timelines, resources, learning system Introductions: faculty, participants
1 hr		DM	Financial Foundations: terms, concepts, financial statements, cash/accrual, fixed v var, etc. Attendees will learn the key foundations for the financial management of a veterinary
30 min		BR	Entering financial data into the spreadsheet they need to bring with them for the in-person workshop

Pre video chat: email with the excel spreadsheet or a link to the data folder with the file.

Pre -Workshop 2 (virtual, possibly post-workshop)

45 minutes		BR	The Entrepreneurial Mindset
1:15		LM	Starting a business: goal setting, start-up experience, strength finder

pre video chat:

Workshop Day 1 (8-5)

8am	8:45	BR	The "Perfect Practice" exercise
8:45	10:00	BR	From Financial Statements to Managerial Accounting
10:15	12:00	BR	Strategic Planning Tools: Where do we want to go?
1:00	2:00	BR	Budgeting and Forecasting
2:00	2:45	BR	Exercise: What do you want to change?
3pm	4:15	RS	Transitioning from Performer to Leader: Blake-Mouton, Consolidated Products
4:15	5:00	RS	DISC set-up
7:30	9:00	RS	DISC exercises to apply skills and concepts (at hotel?)

Workshop Day 2 (8-5)

8am	8:30	RS	DISC wrap
8:30	9:00	RS	Strategic Leadership: adapting to the needs of individuals
9:00	10:00	RS	Instruct, Coach, Relate, Delegate: Puzzle practice/mousetrap exercise
10:15	11:00	RS	Performance Management: feedback and formal performance reviews
11:00	12:00	RS	Troubleshooting Human Performance and Applied Veterinary Cases

1:00 PM	2:30	DM	Practice Financial Health: What it is, assessing it, diagnosing (~1.5hr) practice financial data & tax returns can be powerful diagnostic tools.	will use the spreadsheet with the sample income statement and then the c
2.30pm	3:30		Practice Value (~1 hr) grasp. The focus is on the origins and history of practice value, the factors	
3.30pm	5:00		Ownership: buy, buy-in, sell, exit planning (~1.5hr) owners, - from finding and buying a practice through the purchase	
eve			free time for group	

Workshop Day 3 (8-2)

8am	8:30	BR	Forward from here: their project, 1-on-1s, virtual sessions
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8:30	9:15	RS	Business Model Canvas
9.30	noon	all	Real world case studies (applying model canvas - small group discussions, large group the next case) adding a service adding a haul-in/remodel/expansion adding a doctor merger opportunities
1:00	2:00		Wrap up: Review and next steps
Post: Virtual #1			
1 hour		BR	Marketing: Yourself and your services
45 minutes		BR	Community outreach project: Promoting our profession
15 minutes		BR	Review Projects
Post: Virtual #2			
7:00 PM	9:00 PM	RS	Recruiting and retaining excellent employees
Post: Virtual #3			
7:00 PM	9:00 PM	RS	Compliance with employment regulations and preventing harassment
Post: Virtual #4 (final)			
1:15		DM	Basics of personal financial planning - what you <i>should</i> be doing. are several elements to consider, many of which are more important
45 min		BR	wrap: review path so far, Q*A Personal projects, 1-on-1s, post-survey

operational statement

