

## CASE STUDY

### Practice Diagnostic - An example of the benefits from understanding your Practice better

#### Background and problem recognition

A practice may perceive itself, or be perceived by others, as struggling. In today's climate such a practice may be big or small, dispensing or non-dispensing, single site or multi-site. The symptoms may include falling income, increasing workload, problems recruiting and increased stress.

Our example practice decides it needs an unbiased objective view of what is really driving the problems, previous superficial views, such as the occasional "away day", have not considered the root causes and have never really lead to any lasting improvement.

#### The Xytal Solution

To gain this detailed level of understanding Xytal asks the Practice to send over key preparatory work such as accounts, lists of personnel, any complaints analysis and sickness record. All information that the Practice is likely to have on file.

The visiting team, two or more senior consultants, review this material. The Xytal team observe the domains of:

- People
- Finances
- Processes
- Futureproofing
- Premises

The team visits for 2 days and observes both the Practice in action and carries out a series of semi-structured interviews.

To move forward, first you must understand where you are today.

*This programme has allowed front line staff to shape the way they deliver care.*

- General Practitioner and CCG Clinical Lead



## The Xytal Solution continued...

At the end of the second day there is immediate verbal feedback to the partners and practice manager, this in turn is followed up within 2 working weeks by a written report. The report is presented in a manner that clearly identifies the underlying causes, making the crafting of a recovery plan straightforward.

*People don't mind change, they don't like being changed.*

- Peter Drucker

## Results

- Our findings suggested that the Practice has a dedicated and loyal staff across all areas. They enjoy working within the Practice and have good working relationships with each other. Generally, communication between staff is effective and there was little evidence of disharmony. This was pleasing news to the partners and led to an immediate "feel-good" factor, and a desire to lead some improvements in other areas.
- The Practice is very busy, and staff work hard to deliver good healthcare services to their patients. It was identified that some processes work better than others. Recall systems, repeat prescribing and the patient appointment system were all discussed by staff as areas that they felt could be improved. Two partners volunteered to work with the practice manager and the lead practice nurse on these areas.
- As a dual-site Practice, several staff felt that the main site was sometimes unable to cope with the volume of work, with unavailability of rooms to run clinics being the main concern. Conversely, it was noted that the branch site was underused, and could therefore provide more support to the delivery of services for the patients for the Practice. The practice

manager promised to do some analysis on income and workload with a view to closing down the unprofitable branch surgery.

- Our analysis of the financial reports revealed overall profitability was down year on year, now down to 75% net intended income and the income/profit ratio was running at 0.32. Staff costs were higher than benchmark. This was unexpected in a property owning, dispensing Practice. This added further impetus to the branch surgery review.
- Planning for the future was not evident from our assessment. There was no evidence of succession planning to replace the partners who had resigned. Most of the partners appeared to have a short-term focus for a variety of reasons. This led to the lack of any perceived commitment to the Practice, and no appetite for developing a vision and plan for the Practice that would be attractive for prospective partners.

A short-term, reactive approach rather than a proactive, longer term view appeared to be the norm. This feedback resonated with the partners and they resolved to reach out to their local emerging federation and learn about their options.

Want to learn more?

***Let's start a conversation***

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