



PetDesk

Practice Management Report

Sample Report

PURPOSE

This report looks at your business' current state of health and trends, rolling over the past 12 months (if data is available), to help identify problem areas. Some charts compare data to the previous year for an insightful comparison (only if previous year data is available). It also includes monthly tracking of metrics that will directly impact those annual trends. The month pull-down menu to the right allows you to view historical data.

KEY PERFORMANCE INDICATORS

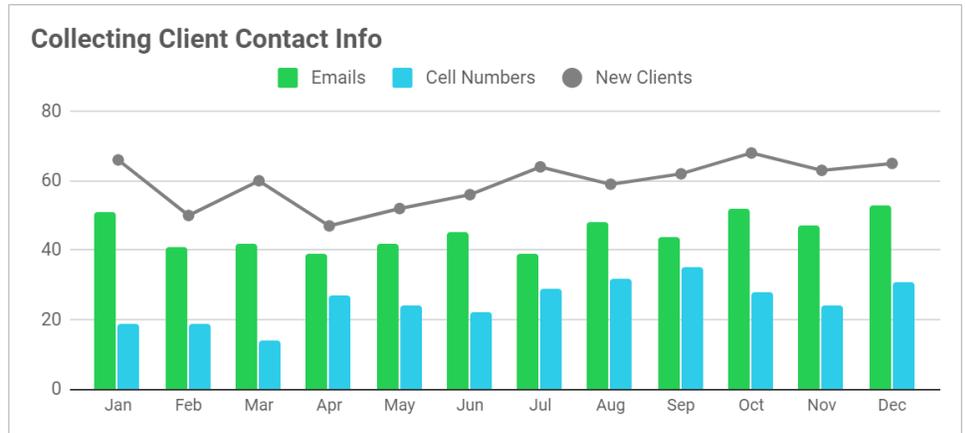
These are the eight areas that directly relate to your business' health and profitability and each will have one key metric that tells us how well you're doing:

1. Current Clients
2. Client Emails
3. Client Cell Numbers
4. Appointments per Client
5. No-Shows
6. New Clients
7. Lost Clients
8. Recovered Clients
9. Client Growth/Shrinkage

MONTHLY METRICS

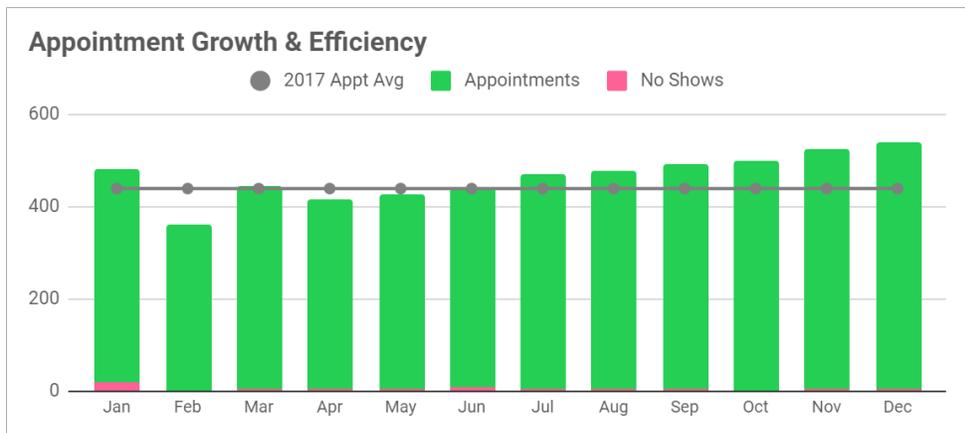
Collecting Client Info

The gray line represents your new clients in that month. The green and blue bars are the new email addresses and cell phone numbers you've collected. If those bars are above the gray line, then you are doing great and receiving up-to-date info from new and existing clients. If they are below the gray line, then you should focus on collecting new client info.



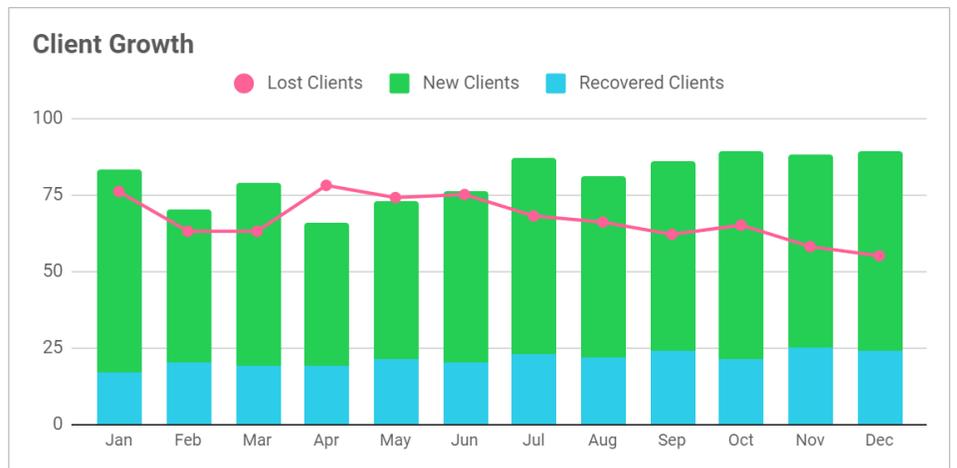
Appointment Growth and Efficiency

The gray line represents the average number of appointments you booked each month last year. The green bar represents the appointments booked for the month and the pink sections are the marked no-shows. You want to see those red bars shrink and the green bars rise above the gray line.



Client Growth

The pink line represents lost clients each month (not seen in 18 months). The green and blue bars are clients you have brought back into the practice or new clients. You are growing as a business if the bars are above the red line and shrinking as a business if they are below the red line.



Monthly Data

These are the numbers we pull or calculate from your practice management system for each month. For example, we see how many new email addresses you have collected or how many new clients have been added. This data is the basis for the monthly report.

2017	Metric	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
25	Emails	51	41	42	39	42	45	39	48	44	52	47	53
11	Cell Numbers	19	19	14	27	24	22	29	32	35	28	24	31
439	Appointments	462	360	439	410	421	435	465	475	487	498	521	535
15	No Shows	20	0	6	6	5	7	4	3	5	2	4	3
48	Non Compliant Clients	30	41	58	59	52	55	47	43	45	39	35	32
70	Lost Clients	76	63	63	78	74	75	68	66	62	65	58	55
11	Recovered Clients	17	20	19	19	21	20	23	22	24	21	25	24
55	New Clients	66	50	60	47	52	56	64	59	62	68	63	65
-12	Current Client Change	7	7	16	-12	-1	1	19	15	24	24	30	34

ANNUAL METRICS

Annual Report Card

We compile reporting data across all of our locations and then stack rank your business against these metrics. Below you will see the 10 KPIs and where your clinic falls on our spectrum with a corresponding grade. Every business is different, so only use this guide for you and your team to spot issues with your clinic.

Each metric has a maximum score of 10 for a total of 90 points.

Metric	Worst Customer	Average Customer	Best Customer	2017	2018	Grade
Clients with Emails	3%	39%	76%	44%	44%	6
Clients with Cell Numbers	1%	39%	82%	45%	42%	6
Appointment Rate	1.50	4.20	6.70	4.13	4.29	6
No Shows	26%	10%	1%	5%	5%	8
Current Clients	18%	46%	68%	39%	32%	3
Lost Clients	35%	11%	2%	16%	14%	6
Recovered Clients	1%	5%	16%	3%	2%	3
New Clients	1%	13%	27%	12%	11%	5
Growth / Shrinkage	-11%	12%	24%	-4%	-7%	2

Grade: 45 out of 90

Annual Data

These are the numbers we pull or calculate from your practice management system for the last two years. We then look at the trend over time to identify possible problems.

Metric	2017	2018	Trend
Total Clients in PIMS	12,580	13,234	Good
Clients marked Active	5,374	6,007	Good
All Current Clients (seen in 18 months)	2,089	1,948	Bad
All Lost Clients (not seen in 18 months)	3,285	4,059	Bad
Lost Clients in a year	864	840	Good
Lost Clients per month	72	70	Good
Recovered Clients in a year	158	135	Bad
Recovered Clients per month	13.17	11.25	Bad
New Clients in a year	663	654	Bad
New clients per month	55.25	54.5	Bad
Change in Current Client Base	-89	-141	Bad
Clients out of Compliance	4,569	4,960	Bad
Total Appointments last year	6,415	5,269	Bad
Average Appointments per month	534.58	439.08	Bad
Average Appointments per client	4.13	4.29	Good
Appointments marked as No Show	197	178	Good
Appointments calculated as No Show	451	353	Good
Clients with Emails	2,365	2,659	Good
Clients with Cell Numbers	2,419	2,546	Good
Clients with Email and Cell Numbers	1,252	1,321	Good

Interested in seeing how PetDesk can help your veterinary practice?

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