

The buddy (as the name suggests), is really there to support the practices with whatever they need as a friend, by helping through the good times and the bad times. The role acts as a bridge between HQ and the practice and is an extension of the partnership.

As we are constantly growing, the buddy role is evolving to become a critical part to ensure that we are building a sustainable future for our practices. There are two main areas of focus for our buddies, which are:

- 1 Transition** - Ensuring that our practices are successfully transitioned into the group, that their teams are engaged and that HG HQ has a strong relationship with the practices to help achieve their objectives.
- 2 Optimisation** - Making sure that there is an ongoing focus on all the things we know that creates a successful practice and more importantly long term sustainability. Clearly, as we bring more practices on board, the buddy role will evolve further to deal with the challenges we face ahead. It is a key part of the buddy responsibilities to ensure that there are robust processes in place in each practice to cover operational and financial controls.

As we get bigger then so does our exposure on clinical and non-clinical regulations for the group and practices, so we have to change our approach to deal with these challenges effectively. In an attempt to outline the key elements that drive optimisation and to create some consistency across the portfolio so that practices know what to expect from the buddies, we have pulled together a draft calendar of activity so that we can effectively schedule the priorities during the course of each year.

Weekly

- Review weekly figures for your practices - Collate and circulate to Imran, Graham and other buddies
- Review Operational compliance with all your practices and use the Health Index 2 and Power BI, to identify and resolve any discrepancies on the following key areas:
 - 1 Practice debt - 90-180 day and 180 day +
 - 2 Practices complete a stock take every calendar month
 - 3 Practices control their till discrepancies and petty cash transactions
 - 4 Effective controls on discounting
 - 5 Practices are completing their schedule of clinical and operational health checks and inspections
 - 6 Further checks in place to ensure that practices who are not on our Optix platform also follow our operational expectations
- Practice call to discuss previous week sales and operational performance and follow up any actions that need to be dealt with by HGHQ
- Ensure practices are completing their schedule of clinical and operational health checks and inspections whilst flagging any issues
- Ensuring practices are completing weekly huddles

Monthly

- Collate and distribute a report for the previous month
- Attend a monthly one-day HQ get together, or virtual session for a portfolio review and update
- Check PT for each practice to ensure accurate and

complete data entry - check the bank statement to ensure costs haven't been missed

- Check in WIGs (Wildly important goals) at the practice and add to the practice report
 - Visit every practice for a few hours at least once and ensure you spend time with each partner to review the previous month, discuss any actions and help move these along with HG HQ where required. Reeducate the practice / partner on anything arising from observations within the monthly report
 - Ensure practices are completing their schedule of clinical and operational health checks and inspections and flag any issues
 - Ensure that practices are completing their monthly Huddle
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Quarterly

- Collate and distribute the quarterly report
 - Attend a two day get together at HGHQ for full portfolio review and update
 - Check PT for each practice to ensure accurate and complete data entry - check the bank statement to ensure costs haven't been missed (this should be a quick exercise based on the monthly review)
 - Check in Wigs (Wildly Important Goals) at the practice and add to the practice report
 - Conduct a longer meeting with each partner to review previous quarter results and check in how they are performing against their annual plan. Pick up any actions that HQ need to help with and review any departmental actions with each team at HQ in person
 - Ensure that your practices are completing health checks and inspections within the agreed scope and timescales and flag any issue
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Bi-annual

- Complete a half yearly review in line with the quarterly approach and format. Plan them in at the start of the year
 - Buddy to complete an operational audit in each practice along with the partner. Plan them in at the start of the year
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Annual

- Ensure that your partners are completing an operational audit in each of the practices (Buddy to validate)
 - Complete a final Q4 / YTD review for each practice in line with the quarterly approach and format. Present this to partner and be available for this to be shared with the team
 - Set next year's goals based on the full report
 - Complete modelling exercise and template for each practice so that new targets are visible from new year
 - Ensure all practices are planning their marketing calendar for the year ahead
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Operational excellence

Part of the buddy role is to ensure that all their practices are operationally and professionally compliant in all areas. The key objectives are:

- All your practices to be performing above 80% on the
- Health index – Work with the Shark and Fish to improve areas of opportunity and set objectives to achieve this during your reviews
- Practice debt is being managed across all categories within 90-180 days
- A monthly stock take is being carried out through all their practices, with all discrepancies investigated

- Ensure that there are controls regarding till shortages and petty cash transactions – All discrepancies highlighted on weekly report to be investigated
- Your practices need to maintain accurate records for eye metric standards, which are built into the Retail and Clinical Excellence (R&CE) Program
- Discount control
- The Practices are completing all actions from the end of year checklist
- Work with the compliance officer for additional support and to ensure all key measures are being monitored
- Whilst relevant practices to continue to work under COVID-19 measures based on regional approach and ensure that an up-to-date risk assessment has been completed

Health check and Inspection platform - Ecoonline

Support practices to complete Health checks and Inspections on Ecoonline within given deadlines and check any actions are completed within time scales.

When a new practice comes on board within the first 26 weeks the Buddy is required to support the practice complete the following Health Checks and Inspections:

- GOS Checklists
 - Staff Checklists
 - Practitioner’s Checklist
 - Record Card Inspection (Annual)
 - Infection Control Inspection
 - Practice Operational Healthcheck
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Our practice buddies



Angela Campbell



Paul Forsythe



Paul Mothershaw



Penny Goddard



Stephen Potter



Kim Whittet



Hayley Gardner-Clark



Damien Wallwork



Sally Whitworth



Nick Chindavata



Mark Chatham



David Thompson