

**TABLE 5.1: SMART Goals to Implement CrVT Utilization and Team Optimization**

<b>Issue Identified</b>	<b>Our practice has determined that we do not utilize our team to maximal efficiency, resulting in the loss of team members, decreased revenue, and burnout.</b>	
<b>Goal</b>	<b>Improve revenue, reward the team, decrease turnover, and improve client retention and satisfaction</b>	
<b>Objective</b>	<b>OBJECTIVE 1</b>	<b>OBJECTIVE 2</b>
<b>SPECIFIC</b>	Implement CrVT utilization to the maximal capacity allowed by state regulation through team development, a gap analysis, and an understanding of maximal capacity as defined by state regulation.	Develop and implement protocols and team training.
<b>MEASURABLE</b>	<ul style="list-style-type: none"> <li>• Less than 10% team member turnover year over year</li> <li>• Increase revenue by 10% through organic growth (not just price increases)</li> <li>• Increase wage ranges based on the scope of duties</li> <li>• Increase client satisfaction (as measured through surveys) from an average of 3/5 to 4.8/5</li> </ul>	<ul style="list-style-type: none"> <li>• 50% of VAs are at level 2 within 6 months of hire</li> <li>• 75% of current VAs are at level 3 within 3 months of training and SOP rollout</li> <li>• 50% of CrVTs are at level 3 within 6 months of hire</li> <li>• 75% of current CrVTs are at level 3 within 3 months of training and SOP rollout</li> <li>• Increase the number of CrVT appointments by 10% month over month until maximal efficiency has been achieved</li> </ul>
<b>ACCOUNTABILITY</b> (in place of Achievable)	<b>ACTION ITEMS/ACCOUNTABILITY</b>	
	<ol style="list-style-type: none"> <li>1. Create a Utilization Team with representation from all practice roles (veterinarian, CrVT, VA, CSR, and kennel team) to contribute to and participate in all decisions and activities of the team utilization plan. ASSIGNED TO _____.</li> <li>2. Complete a gap analysis to assess the current situation by evaluating the team’s daily duties and tasks. Identify which tasks are routinely performed by veterinarians that could be performed by CrVTs, as well as future growth opportunities if tasks are not a current duty (Table 5.3). ASSIGNED TO _____.</li> <li>3. Review the state practice act, rules, and regulations for a scope of duties that can be delegated to CrVTs and other team members with Immediate Supervision, Direct Supervision, and Indirect Supervision. ASSIGNED TO _____.</li> </ol>	<ol style="list-style-type: none"> <li>1. From the completed gap analysis, identify training gaps for current protocols and what training needs to be developed to ensure successful implementation. ASSIGNED TO _____.</li> <li>2. From the completed gap analysis, identify opportunities for utilization that need to be implemented, what protocol(s) need to be developed, and what training needs to happen to ensure successful implementation. ASSIGNED TO _____.</li> <li>3. Develop a standardized workflow for optimal utilization that maintains team alignment. ASSIGNED TO _____.</li> <li>4. Develop standardized hospital processes and procedures to maintain team alignment and improve efficiency. ASSIGNED TO _____.</li> </ol>

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**TABLE 5.1: SMART Goals to Implement CrVT Utilization and Team Optimization, Continued**

Objective	OBJECTIVE 1			OBJECTIVE 2		
<b>ACCOUNTABILITY</b> (continued)	4. Review the scope of practice as outlined by the AAVSB. ASSIGNED TO _____.  5. Create a foundation of transparency with the team; present the findings of the gap analysis and seek input for successful goal implementation. ASSIGNED TO _____.			5. Equitably assign tasks using the five rights model of delegation described in Section 2. ASSIGNED TO _____.  6. Deliver team training that keeps the team aligned on workflow and provides tools for all team members to perform optimally at their level. ASSIGNED TO _____.  7. Assess progress and provide feedback, both to individuals and as the whole team. Define where the practice was, where it is now, and the remaining goals to achieve. ASSIGNED TO _____.		
<b>RESOURCES</b> (in place of Relevant)	<b>Resources</b> <ul style="list-style-type: none"> <li>• State Veterinary Practice Act/Rules and Regulations found on the state board of veterinary medicine website</li> <li>• AAVSB Model Regulations—Scope of Practice for Veterinary Technicians and Veterinary Technologists</li> </ul>			<b>Resources</b> <ul style="list-style-type: none"> <li>• AAHA Implementing Preventive Care Protocols: <a href="http://www.aaaha.org/globalassets/05-pet-health-resources/implementing-preventive-care-protocols.pdf">www.aaaha.org/globalassets/05-pet-health-resources/implementing-preventive-care-protocols.pdf</a></li> <li>• Partners for Healthy Pets: <a href="http://www.partnersforhealthypets.org/resources-toolbox/communications/">www.partnersforhealthypets.org/resources-toolbox/communications/</a></li> <li>• AAHA Mentoring Guidelines: <a href="http://aaha.org/mentoring">aaha.org/mentoring</a></li> </ul>		
<b>TIMEBOUND</b>	<b>TIMELINE</b>					
	<b>Action item #1 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____	<b>Action item #1 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____
	<b>Action item #2 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____	<b>Action item #2 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____
	<b>Action item #3 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____	<b>Action item #3 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____
	<b>Action item #4 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____	<b>Action item #4 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____
	<b>Action item #5 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____	<b>Action item #5 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____
	<b>Action item #6 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____	<b>Action item #6 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____
	<b>Action item #7 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____	<b>Action item #7 due:</b> _____	Checkpoint date #1: _____	Checkpoint date #2: _____
<b>Add additional action items as needed</b>						

CrVT, credentialed veterinary technician; CSR, customer service representative; VA, veterinary assistant

**The 2023 AAHA Technician Utilization Guidelines are available at [aaha.org/technician-utilization](http://aaha.org/technician-utilization).**

These guidelines were prepared by a Task Force of experts convened by the American Animal Hospital Association (AAHA) and were subjected to a formal peer-review process. This document is intended as a guideline only, not an AAHA standard of care. These guidelines and recommendations should not be construed as dictating an exclusive protocol, course of treatment, or procedure. Variations in practice may be warranted based on the needs of the individual patient, resources, and limitations unique to each individual practice setting. ©2023 AAHA.

