

Spinning plates

Specialist medical accountant Pauline Hogg offers her top tips on prioritising the financials for new or hard-pressed practice managers

I spend a lot of my time in GP surgeries talking to hassled practice managers who are spinning plates. I also meet new practice managers who have so much information to get to grips with that they don't know where to start. Here are my eight top tips to help you feel more in control:

1 Press the pause button

Remember you are not superhuman. Stay calm and don't put yourself under unnecessary pressure. It's perfectly acceptable to take a few weeks to get your head around things. Listen, watch and trust your gut instincts. You will soon work out what's going on.

2 Address the financials

In the early days focus only on the 'must do' list, ie payroll and the partners' drawings. Make sure everyone is paid correctly and on time. Nothing else. Then meet the finance partner and establish what the partners expect from you from a financial perspective. Schedule in regular financial updates to keep partners informed. Check over all the spreadsheets you have inherited and call your accountant and ask for help. Don't be embarrassed if you don't understand anything or you need to be shown how to do something - that is what you pay your advisors for. And if you are getting nowhere or not finding out what you need from them then perhaps it's time to look for a new accountant.

3 Get a handle on cashflow

Prepare a cashflow spreadsheet to project and monitor the income, costs and bank balance for the remainder of the financial year. This is especially important when you have partner changes. Your accountant should be able to help you keep everything nice and simple.

4 Assess your accounts software

Once you've been in the job for a few weeks you'll have a clearer grip on how your accounts software is performing. If there are endless spreadsheets to wade through and you can't print off the reports you need at the press of a button then it's time for change. The current software available is quite simply transformational and is inexpensive and easy to use. Your accountant should be suggesting appropriate accounts and payroll packages that you can easily install - if not, ask them for advice. Once your new software is set up and the partners are getting timely financial information, congratulate yourself. You have justified why they brought you in.

5 Outsource

There are no prizes for being a superhero so reflect on where you need specific expertise and consider outsourcing. Examples include contracting out the practice's health & safety requirements or payroll, which now carries the additional burdens of RTI and auto enrolment. This will free up your time and increase your efficiency.

6 Acknowledge the barriers

In any job there are always good days and bad days. Inevitably you'll hear the dreaded phrases 'no, we can't do that,' or, 'we've never done it that way'. This is simply fear of change manifesting itself and is something we hear in every organisation we work with. We have seen many examples of GPs complaining about their workload, yet doing nothing as if things will then magically change. So to avoid the hamster wheel of madness you may have to poke and prod them. If change is needed it has to be led from the top and if you don't have experience in change management then bring in people who do.



Pauline Hogg is a partner at Condie's Health, a member of the Association of Independent Specialist Medical Accountants. For more information call **01383 721421** or email **pauline.hogg@condie.co.uk**. To find an AISMA accountant visit **www.aisma.org.uk**

7 Spring clean

When (and only when) you are comfortable in your role will you be in a position to make some real changes. In our firm we regularly ask our practice managers how we can help them and three quarters of the feedback we get relates to managing staff. We hear an endless list of concerns around poor performance, or people not accepting new responsibilities. This is where your management skills come in. Offer training and support when implementing new procedures and systems and explain why this is necessary. If staff refuse to shift, then it may be time for change. Respond to resistance clearly, support and fully train staff through the process and manage out those who will not comply. Don't listen to anyone who tells you that you can't change the team. Follow the process properly and you can shape your team to suit the practice's needs.

8 Communicate

In our experience you may have to say things several times before information sinks in. So communicate regularly with your team. Speak to the partners and staff, and tune into what is happening in the practice. Speak to fellow practice managers or ask your accountant – they should know what works well in other practices and will be able to provide some invaluable guidance and assistance. Use your network and save yourself some time and energy.

Finally pat yourself on the back occasionally for a job well done. You are operating in a challenging environment and being a practice manager is not easy. Try to trust your instincts and enjoy your job.

