INDIGO
MEDICAL
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How Healthy Is Your Practice?

A PRACTICAL HEALTH CHECK FOR HEALTHCARE PRACTICE OWNERS

A thoughtful review to help you look beyond the everyday, uncover opportunities and strengthen your practice for the future.

A COMPANION RESOURCE TO
THE ESSENTIAL GUIDE TO CREATING
A SUCCESSFUL HEALTHCARE PRACTICE

INDIGO MEDICAL CONSULTING

A NOTE FROM INDIGO

Looking Beyond the Everyday

Running a healthcare practice involves bringing together so many different elements — your people, leadership, systems, financial performance, patient experience and the everyday decisions that keep everything moving forward. Each plays an important role. Just as important, though, is how they work together.

Throughout my work with healthcare practices, I've often found that some of the most valuable opportunities for improvement come from looking a little deeper. What first appears to be a staffing concern may have its roots in a workflow. A practice may have strong appointment utilisation and growing revenue, yet profitability may tell a different story. Policies may be carefully documented without being fully understood or reflected in everyday practice. These connections can be easy to overlook when we are immersed in the day-to-day. That's why I've created this Practice Health Check: to help you recognise what is working well, explore what may be sitting beneath the surface and perhaps consider something you haven't looked at before.

How Healthy Is Your Practice

How To Use This Assessment

Work through the eight areas at your own pace. For each statement, select Yes, Partly, No or Unsure. Think not only about whether something exists, but how it is communicated, used and reviewed in everyday practice. “Unsure” can be just as useful an answer as “No” — it may point to a conversation worth having.

You’ll also find a “Something to Think About” reflection in every section. These are drawn from the situations and connections I see in healthcare practices. They aren’t there to find fault. They’re gentle invitations to look at familiar things from a fresh perspective. You might discover something is working beautifully, or find yourself thinking, “We haven’t really considered that before.”

The Essential Guide explores the elements of a successful healthcare practice. This companion assessment invites you to consider how those elements are working in your own practice.

A useful way to approach each question

Do we have it? Is it part of everyday practice? Is it working? How do we know?

There are no right or wrong results. You do not need to have everything in place to benefit from this exercise. Sometimes it is not about doing more — it is about looking a little differently at what we are already doing.

How Healthy Is Your Practice

PRACTICE HEALTH CHECK / 01

Practice Direction & Future Growth

A shared direction helps everyone understand where the practice is heading. As the practice evolves, it is worth checking whether its structure, responsibilities and systems are still supporting that direction.

For each statement, select the response that best reflects your practice today.

Consider your practice	Select			
Our practice has a clear direction and priorities that are understood by those responsible for leading it.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Our values influence decisions, recruitment, expectations and how people work together.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Practice Owners and management have clarity about who makes which decisions and where accountability sits.	☐ Yes	☐ Partly	☐ No	☐ Unsure
As the practice has grown, we have reviewed whether our management structure, decision-making and systems still suit its size and complexity.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We consider business risks, upcoming changes and the resources needed to support our plans.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We revisit our priorities as the practice, team and patient needs change.	☐ Yes	☐ Partly	☐ No	☐ Unsure

How Healthy Is Your Practice

SOMETHING TO THINK ABOUT

Has the way your practice operates grown with the practice itself?

Healthcare practices rarely stand still. Over time you may welcome new practitioners, introduce services, employ more people or see increasing patient demand. Growth can bring wonderful opportunities. It can also change what the practice needs from its management structure and everyday systems.

The responsibilities and ways of working that suited a small practice may not offer the same support once the team is larger and operations more complex. Often the changes happen gradually: someone takes on an extra responsibility, a new process is added, and everyone finds a way to keep things moving. None of that is unusual. It simply means that the practice may now look quite different from the one those arrangements were designed for.

As your practice has grown, have you taken the opportunity to review whether your leadership responsibilities, decision-making arrangements and operational systems have grown with it? And looking ahead, what might need to evolve now to support the practice you want to build?

Your thoughts / something to explore further:

How Healthy Is Your Practice

PRACTICE HEALTH CHECK / 02

Practice Management & Leadership

Practice management is about much more than keeping the day running. Everyday leadership influences how people communicate, respond to challenges, work together and deliver the experience you want your practice to be known for.

For each statement, select the response that best reflects your practice today.

Consider your practice	Select			
The Practice Manager's responsibilities, decision-making authority and priorities are clearly defined.	☐ Yes	☐ Partly	☐ No	☐ Unsure
The Practice Manager leads through everyday communication, feedback, decisions and behaviour — not simply by coordinating tasks.	☐ Yes	☐ Partly	☐ No	☐ Unsure
The Practice Manager has access to the information needed to make informed operational decisions.	☐ Yes	☐ Partly	☐ No	☐ Unsure
The Practice Manager and Practice Owners model the values and behaviours expected of the whole team.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Delegation includes clear expectations, appropriate authority and a way to follow up outcomes.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Our leaders actively develop employees, address concerns early and create a culture of shared accountability.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Our management arrangements allow time for planning and improvement, not only urgent tasks.	☐ Yes	☐ Partly	☐ No	☐ Unsure

How Healthy Is Your Practice

SOMETHING TO THINK ABOUT

How does leadership show up in everyday practice?

When we think about a Practice Manager, it is easy to focus on the visible responsibilities — staff, rosters, operations, problems to resolve and all the moving parts of a busy day. Yet leadership is also reflected in the smaller moments. How are decisions explained? What happens when someone makes a mistake? Are people supported to learn? Are expectations clear, and do the behaviours of leaders reflect the values of the practice?

These moments shape the way a team feels, behaves and performs. A Practice Manager's approach to communication, feedback, accountability and support can influence workplace culture, team performance and ultimately the patient experience. Practice Owners also have an important part to play by providing direction, demonstrating the same values and creating the clarity and trust needed for effective leadership.

Are we mainly managing the day-to-day work, or consciously leading our people and shaping the environment in which they can do their best work? And have we given the Practice Manager both the opportunity and the responsibility to lead, rather than simply administer?

Your thoughts / something to explore further:

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PRACTICE HEALTH CHECK / 03

Practice Performance & Financial Management

Numbers are useful when they help us understand what is happening, why it may be happening and what to do next.

For each statement, select the response that best reflects your practice today.

Consider your practice	Select			
We have a small set of meaningful KPIs that reflect our practice model and priorities, not just total revenue.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Monthly performance reports are prepared and discussed with Practice Owners and management.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We understand the difference between revenue, profitability, cash flow and activity.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We monitor appointment utilisation alongside cancellations, DNAs, patient demand and appointment mix.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We review staffing costs, overtime and other operating expenses in the context of service activity.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We understand how practitioner arrangements, billing patterns and service mix influence financial outcomes.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We use budgets, forecasts and performance trends to guide decisions and forward planning.	☐ Yes	☐ Partly	☐ No	☐ Unsure
When results vary from expectations, we explore possible operational causes before deciding on a solution.	☐ Yes	☐ Partly	☐ No	☐ Unsure

How Healthy Is Your Practice

SOMETHING TO THINK ABOUT

What if the appointment books are full, but the profit is not?

A full appointment book can be encouraging. Patient demand is strong, practitioners are busy, utilisation is high and revenue may even be increasing. But what if, despite all that activity, the profit left in the business is still lower than expected? That is when it becomes valuable to look beyond the headline numbers.

Perhaps the cost of delivering appointments has risen alongside revenue. Staffing hours, overtime, practitioner arrangements, service mix, consumables and other operating expenses may all influence the result. A highly utilised appointment book does not, on its own, tell us whether the work is being delivered efficiently or profitably. Equally, a lower margin does not automatically mean staffing is the issue.

Sometimes the explanation becomes clearer only when we connect the financial information to the way the practice operates. Are appointment types and billing arrangements appropriate? Are inefficient workflows creating extra administrative hours? Are duplicated tasks, interruptions or last-minute changes adding cost? These are possibilities to explore, not conclusions to jump to. The most useful monthly performance review brings the numbers and the operational story together.

When your figures look positive on the surface but the financial result is not what you expected, do you explore what is happening behind those figures? Are your KPIs helping you understand why — and guiding decisions about what to investigate next?

Your thoughts / something to explore further:

PRACTICE HEALTH CHECK / 04

HR Foundations, People & Workplace Culture

Strong teams need sound employment foundations, but they also need communication, development, trust and a culture that can be seen in everyday behaviour.

For each statement, select the response that best reflects your practice today.

Consider your practice	Select			
Employment contracts, position descriptions and arrangements are current and appropriate for each employee.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Award coverage, classifications, pay rates, allowances and other entitlements are checked and reviewed.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Our induction introduces employees to their role, workplace expectations, policies and team culture.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We have regular individual check-ins with staff, not only conversations when something goes wrong.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Team meetings provide space for communication, ideas, shared priorities and follow-up.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Employees receive feedback, recognition and meaningful opportunities to develop their skills.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Performance and development conversations are planned, documented and followed through.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Managers have the knowledge and confidence to respond fairly and consistently to workplace concerns.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Our practice values are reflected in the behaviours we encourage and the behaviours we address.	☐ Yes	☐ Partly	☐ No	☐ Unsure

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Consider your practice	Select			
We seek staff feedback and take time to understand the culture employees actually experience.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Our approach to workforce planning considers capability, workload, wellbeing and retention.	☐ Yes	☐ Partly	☐ No	☐ Unsure

SOMETHING TO THINK ABOUT

Would your team describe the same culture you believe you have?

Every practice has a culture, whether it has been intentionally developed or has simply grown over time. You may have a friendly, longstanding team and values that everyone knows. But culture is also reflected in what people experience on an ordinary Tuesday — and especially on the difficult days.

When the practice is under pressure, do people support one another? Can employees raise concerns without feeling uncomfortable? Are the behaviours you value recognised and modelled by leaders? And when a behaviour does not reflect those values, is it addressed thoughtfully and consistently? These everyday interactions often tell us more about culture than the words in a document.

If you invited your team to describe the workplace honestly, what might they say they see, hear and feel? Would their experience match the culture you hope to create? Their perspective may reveal strengths to celebrate, as well as something worth exploring together.

SOMETHING ELSE TO CONSIDER

Are we developing our people, or mainly managing their tasks?

It is easy for conversations with employees to centre on rosters, workloads and the tasks that need to be done. Those discussions are important, but so is taking time to ask how people are going, what they enjoy, where they feel stretched and what they would like to learn.

How Healthy Is Your Practice

Development does not always mean a promotion. It might mean growing confidence, learning a new skill, being trusted with a responsibility or receiving thoughtful feedback. Regular check-ins and team meetings can become valuable opportunities to listen, recognise contributions, strengthen relationships and make sure actions are followed through.

When did we last have a conversation with each employee about their growth, rather than just their work? And what have we done with what they shared?

Your thoughts / something to explore further:

PRACTICE HEALTH CHECK / 05

Recruitment & Workforce Planning

Recruitment works best when it begins with understanding what the practice really needs, rather than simply replacing a person or adding another role.

For each statement, select the response that best reflects your practice today.

Consider your practice	Select			
We review workload, patient demand and future plans before deciding whether to recruit.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We consider whether an apparent staffing shortage may also involve workflow, role design or delegation.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Each vacancy has a clear purpose, responsibilities and selection criteria.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Our recruitment process assesses capability, values and suitability for the practice environment.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We plan for induction, training and the time needed for a new employee to become effective.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We understand why employees leave and look for patterns rather than relying on assumptions.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We consider succession, skills gaps and upcoming changes before they become urgent.	☐ Yes	☐ Partly	☐ No	☐ Unsure

How Healthy Is Your Practice

SOMETHING TO THINK ABOUT

Is another person always the answer?

When a team is stretched, recruiting another employee can seem like the natural next step. Sometimes it is exactly what the practice needs. But before deciding, it can be helpful to look at what is creating the pressure in the first place.

Have responsibilities gradually changed? Are people duplicating work or spending time correcting avoidable errors? Are interruptions, unclear handovers or inefficient processes making an already busy day harder? And have we asked the people doing the work what they believe would help? These questions do not rule out recruitment; they help us recruit for the right reasons and design a role that genuinely supports the practice.

Before we decide we need another person, have we taken the time to understand the work, the workflow and what the team is experiencing? What might we discover if we looked beneath the immediate pressure?

Your thoughts / something to explore further:

PRACTICE HEALTH CHECK / 06

Policies, Systems, Workflows & Accreditation

Documented systems help support safe, consistent care and operations. Their value is realised when they are understood and used, not simply filed away.

For each statement, select the response that best reflects your practice today.

Consider your practice	Select			
Our policies and procedures are current, relevant and accessible to the people who need them.	☐ Yes	☐ Partly	☐ No	☐ Unsure
New and updated policies are explained, communicated and introduced into everyday work.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We check whether employees and relevant contractors understand what a procedure means for their role.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Key workflows are documented with clear responsibilities and handover points.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We review how work is actually performed, rather than assuming the written process is followed.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We consider whether repeated mistakes or delays may point to a system issue, training need or unclear expectation.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We maintain evidence and records needed for applicable compliance and accreditation requirements.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Accreditation readiness and risk management are part of routine practice, not only a last-minute project.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Changes to processes are followed up to see whether they have made things better.	☐ Yes	☐ Partly	☐ No	☐ Unsure

How Healthy Is Your Practice

SOMETHING TO THINK ABOUT

How do your policies come to life in everyday practice?

I often see practices invest considerable time and care in developing policies and procedures. They may be comprehensive, up to date and readily available. Yet when we look at the everyday work, we sometimes find employees have not been guided through them, are unaware of a change or have developed different ways of handling the same situation.

That does not necessarily mean anyone has done something wrong. Sometimes the missing piece is implementation: taking the time to introduce a policy, explain why it matters, show what it means for each role and then check that it has become part of the normal way of working. A manual is an important foundation, but it cannot do that work on its own.

Think about a patient complaint. If a concern were raised tomorrow, would everyone know how to respond, what to document and who should be involved? If the procedure changed six months ago, how would you know that the new approach is now being followed consistently? And if it is not, could the issue be communication or training rather than an individual employee?

When you think about your policies, are you considering only whether they exist — or also how they are communicated, understood, supported and seen in everyday practice?

Your thoughts / something to explore further:

PRACTICE HEALTH CHECK / 07

Patient Experience, Reputation & Growth

Every interaction contributes to the patient journey. The experience you promise should be reflected not only in clinical care, but in what patients see, hear and feel at every touchpoint.

For each statement, select the response that best reflects your practice today.

Consider your practice	Select			
We have mapped the complete patient journey, including what patients see, hear and feel at each touchpoint.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We seek and review patient feedback, complaints and compliments for recurring themes.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We consider how every team member — clinical, reception and behind the scenes — contributes to the patient experience.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We check whether the experience patients actually receive reflects the values and promises we communicate.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We explore whether internal workflows and communication affect the experience patients have.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Our marketing and growth plans are aligned with practitioner capacity, team capability and service quality.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We use feedback and operational information together to identify improvements.	☐ Yes	☐ Partly	☐ No	☐ Unsure

How Healthy Is Your Practice

SOMETHING TO THINK ABOUT

What do your patients see, hear and feel along their journey?

Patient experience begins well before someone sits down with their treating practitioner. It may start with a website visit, a telephone call or the first conversation with reception. It continues through booking, arrival, waiting, consultation, billing, follow-up and the small moments in between. Each touchpoint tells patients something about your practice.

And every team member contributes. The person answering the phone, the clinician, the receptionist explaining a delay and the colleague working behind the scenes all influence how the journey feels. You may describe your practice as welcoming, caring, professional and patient-centred — but how consistently are those qualities experienced? Does the way people communicate, respond to concerns and support one another reflect what you say matters?

If you followed a patient from their very first enquiry through to follow-up, what would they see, hear and feel? Would their experience reflect the promise you make about your practice? And where might an internal communication gap or workflow issue be shaping that experience without anyone quite noticing?

Your thoughts / something to explore further:

PRACTICE HEALTH CHECK / 08

Continuous Improvement & Future Planning

Improvement does not need to be a major project. Often it begins with noticing a recurring issue, understanding it and making one practical change.

For each statement, select the response that best reflects your practice today.

Consider your practice	Select			
We have a simple way to record ideas, recurring problems and quality improvement activities.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We explore what may be contributing to an issue before settling on a solution.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Employees are encouraged to share practical ideas about how work could be improved.	☐ Yes	☐ Partly	☐ No	☐ Unsure
Improvement actions have an owner, a timeframe and a way to review the outcome.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We check whether changes have helped rather than assuming implementation means success.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We set aside time to plan for upcoming changes, risks, training and practice priorities.	☐ Yes	☐ Partly	☐ No	☐ Unsure
We revisit our priorities and adapt when the needs of the practice change.	☐ Yes	☐ Partly	☐ No	☐ Unsure

How Healthy Is Your Practice

SOMETHING TO THINK ABOUT

Are we solving the issue — or simply managing it again?

Busy healthcare teams are often very good at responding. A handover is missed and someone fixes it. A patient concern arises and the team resolves it. A roster issue appears and everyone pulls together. That responsiveness matters, and it deserves recognition.

But when similar issues keep returning, they may be inviting us to look a little deeper. Is a process unclear? Have responsibilities changed? Is information getting lost between people or systems? It can be tempting to treat each incident as separate when a common cause is sitting underneath.

Continuous improvement does not have to be complicated. It can begin by noticing a pattern, talking with the people closest to the work, trying one sensible change and then checking whether it helped. The important part is making time to learn from what keeps happening.

Where might your practice benefit from moving beyond fixing today's problem to understanding why it keeps appearing? And how will you know whether the change has made everyday work better?

Your thoughts / something to explore further:

YOUR REFLECTION

What Have You Discovered About Your Practice?

You may have recognised many things your practice does well. You may also have noticed an area that deserves another conversation, or a question you had not thought to ask. Both are valuable discoveries. This is not about a perfect score; it is about seeing your practice more clearly and choosing what is worth exploring next.

Three strengths worth recognising

Three areas I would like to explore further

Something I had not considered before

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One conversation I would like to have with my Practice Manager or leadership team

A practical next step

Choose one area to explore first. Before deciding on an action, ask what you already know, what you may be assuming and what additional information or perspectives could help you understand the full picture.

Area to explore:

What would help us understand it better?

Who should be involved?

When will we revisit it?

A final thought

Sometimes the most valuable discoveries are not the obvious ones. A financial result may have an operational story behind it. A staffing concern may connect to a workflow. A policy may be beautifully written but not yet part of everyday practice. And the experience patients take away may reveal something about how the whole team works together.

My hope is that this assessment has given you a little space to step outside the everyday and look at your practice with fresh eyes. Celebrate what is working. Be curious about what is not quite working as you hoped. And remember that meaningful improvement often starts with one thoughtful question, not a long list of new tasks.

If this assessment has prompted a few questions, I would love to help you explore them. At Indigo, we work alongside Practice Owners and Practice Managers across leadership, people, systems, performance and everyday operations. You may be looking for guidance in one particular area, or a fresh perspective on the practice as a whole. Our One-Day Practice Review & Audit is one way to begin.

Explore how Indigo can support your practice

Practice Management Consulting
One-Day Practice Review & Audit

I'd love to hear from you.

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This is a reflective management resource, not a legal, financial, clinical or accreditation compliance audit. Requirements should be checked against the circumstances of your practice.