

Information Request - Profit Solver Workshop Instructions

In preparation for our upcoming Profit Solver workshop, we will need to gather specific practice information from each practice to populate the Profit Solver software.

We have put this document together to help you gather the requested information. Typically our clients spend less than an hour gathering this information.

Below is what we are requesting from your practice:

What Do We Need:

1. Profit and Loss Statement (Most recent 12 month period)

- For example, if you have October closed out, you can use the date from November 1, 2021 to October 31, 2022
- You can obtain this from your accounting software (i.e., QuickBooks) or your CPA

2. Payroll Summary Report from your Payroll company or Quickbooks

- Cover the same 12 month period as your P&L
- The report should include the following:
 - Name
 - Position (DVM, Tech, Assistant, front desk,ect.)
 - General wage information: (payroll wages, Salary)
 - Hourly rate
 - Total overtime hours worked and Paid
 - Vacation days or hours (if any)
 - Holiday hours (if any)
- *Note: once we have this information and analyze it against the P&L, we may reach out and confirm the employee benefits.*

3. Information from your Practice Management Software

- Cover the same 12 month period as your P&L
- Doctors production Report
 - Depending on your practice software, it may be described differently. You can refer to the PDF "Tips for Running Services Reports" or contact our support person to help you.
 - For example:
 - **Avimark** - Period Totals, **Cornerstone** Staff Productivity Report
- Services Report
 - **AVImark** - Information Search or Income By Treatment (does not have price)
 - **Cornerstone** - Service Sales Report - Monthly - By Class By Item Desc (12 months) As one report.

4. Would be Nice to Have...but not critical (will allow for greater accuracy)

- Basic equipment information
 - Anesthesia machines - not what kind but how many
 - Lab equipment type and number
 - Reference lab choice

When Do We Need It:

ASAP

What if We Have Questions:

You can email or call anyone of us at anytime, if you have any questions or need help with any of the information requested.

Ulli Riddick - 855-810-9274 opt 1 or email ulli@feetech.net

Brad Marconyack - 954-614-8835 or email Brad@feetech.net

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