

CLIENT IMPACT CASE STUDY

OHIO • MIXED ANIMAL PRACTICE



BACKGROUND & CHALLENGES

This mixed animal general practice in the Midwest came to Blue Heron Consulting with bookkeeping that had fallen significantly behind, limiting leadership's ability to understand and manage the financial health of the hospital. With a small but busy team, day-to-day operations continued moving forward, but financial reporting had become inconsistent and outdated. At the time of engagement, the practice was operating with financials that were approximately six months behind. Transactions had been inconsistently categorized, and there was little visibility into key performance indicators such as cost of goods sold, lab expenses, and inventory spending. Without timely and accurate reporting, leadership lacked confidence in answering fundamental questions around profitability, spending, and hiring readiness. Financials existed, but they were not structured or current enough to serve as a meaningful decision-making tool.

Practice Type: Mixed Animal Practice

Location: Northwest Ohio

DVMs: 2 FTE veterinarians

Staff: 9 staff members

Hours: Monday – Friday (8 am – 5 pm);
Saturday (8 am – 12 pm);

SOLUTIONS

FINANCIAL CLEANUP & RESTORATION

A full historical cleanup was completed to bring six months of outdated bookkeeping up to date. This included reviewing and correcting transactions, reconciling accounts, and ensuring all financial data was complete, accurate, and aligned moving forward.

CONSISTENCY & REPORTING STRUCTURE

Standardized monthly bookkeeping workflows were implemented to ensure financials are consistently completed on time, properly categorized, and fully reconciled. Clean, easy-to-read Profit & Loss statements were introduced, providing both high-level insight and category-level visibility aligned with industry standards.

ALIGNMENT WITH OPERATIONS

Financial reporting was aligned with how the hospital operates day-to-day, ensuring consistency between bookkeeping and practice management systems. This allowed leadership to better understand where money is being generated and spent in a way that reflects real operational activity.

RESULTS



Full Financial Catch-Up

Six months of backlog fully cleaned up and reconciled.



Consistent Monthly Reporting

Monthly financials now delivered on time and consistently.



Clear Cost Visibility

Improved visibility into COGS and key expense categories.



Data-Driven Leadership

Leadership now uses financials to guide hiring and business decisions.