

Succession Planning for your Dispensary Business

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A New Service Offering

Many Dispensaries I work with don't have time or the skills to produce and implement and update accurate Dispensary Management Accounts...

We have the capacity to do this for your Dispensary [Limited numbers of course!]

Email me

greg@dispensingdoctorexerts.co.uk for a FREE 30 minute consultation and informal discussion if you are interested.



Introduction



Reflective learning;

Use this slide deck as a guide

What is going on in your dispensary?

Your Current Dispensary Managers
– what do they do and when do they do it?

Introduction

A change in *management* is a threat and a potential opportunity...



Philosophical Consideration 1

Dispensary Manager
Dispensary Lead
Lead Dispenser
Senior Dispenser

All the same or subtly different?

Opportunity to implement
change...



My Experience



Dispensary Managers carry a LOT of information around inside their heads...

Especially experienced Dispensary Managers

When was your last change in Dispensary Manager

Introduction

CONTEXT for todays slides...

What plans [if any] do you have in place [for the next dispensary manager]?



Disaster Strikes!

“We are a dispensing practice, who is looking for consultancy following the departure of our dispensing manager.”

Not too late, but better to be prepared beforehand



Introduction

Succession Management is VITAL
Loss of the Dispensary Lead or
Dispensary Manager is probably
the number one cause of
dispensary disfunction.

Start planning ***now.***



First Steps

Create an [agreed] timeline which ends with the departure of the current Dispensary Manager

Mark off key learning objectives and give them a deadline date and **STICK TO IT, no excuses!**

Diarise regular handover discussions to build the knowledge of the new manager



First Steps



Time and Motion

***How much time is spent by the
Dispensary Manager...***

Managing People?

Managing Processes?

Managing the Business?

Introduction

The New Dispensary Manager
thrown in at the deep end may sink
or swim...

Lack of training and upskilling and
communication can end badly...



The Potential Outcome

<u>FP10/Electronic Prescription Claims</u>	<u>Prescriptions</u>	<u>Items</u>
Exempt from patient charge	8 9 9 5	2 1 7 9 6
Patient charge paid	4 0 9	4 6 5
Patient charge paid at old rate		2 2 2 6 1
Total - All Prescriptions	9 4 9 4	
ETP Token for non-payment	☐	
EPS release 2 claim messages	☐	
<i>Tick box if any submitted</i>		

The Potential Outcome

Part 1 Submissions		
<u>FP10/Electronic Prescription Claims</u>	<u>Prescriptions</u>	<u>Items</u>
Exempt from patient charge	1 7 8 9	4 2 3 5
Patient charge paid		
Patient charge paid at old rate		
Total - All Prescriptions	1 7 8 9	4 2 3 5
ETP Token for non-payment	☐	
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The Potential Outcome



Part 1 Submissions		
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Tick box if any submitted		

- Lack of training/understanding
- Enthusiastic but poor Management Structure
- Virtually no communication
- “Gatekeeping”
- No recording methodology
- Lack of Management Accounts

Introduction

If you are considering all the questions I am going to ask, you are currently Succession Planning without even realising it!

Positivity is an important factor.



Before you
even start...

Is there a workable management structure?

Are there regular team communications and discussions?

Is everyone on board and motivated?

Is there a member of staff being prepared for their next steps?

[Can be more than one]



Succession Planning



Dispensary Information

Tasks:

Prepare a Handover List

Passwords

Contact details [pharma, wholesalers,
Buying groups etc]

Hard Copy – does everyone know where
it is? {Fireproof safe}

Digital copy – where is it stored?

Is it updated regularly?

Your Starting
Point



Is the dispensary lead or is one person doing the majority of the essential Dispensary management tasks?

Delegation of tasks?

When was the last time you looked at and discussed with the team daily, weekly, monthly and annual task lists?

Homework

Utilise these slides to provoke a discussion internally and plan for the future.

The checklists aren't exhaustive, but give a good starting point.



What goes on
in a busy
Dispensary?

These are not
exhaustive lists!



Daily Tasks:

- Ordering stock [more difficult now/needs more attention]
- Receiving stock
- **Checking delivery notes/invoices**
- Putting stock onto the shelves
- Printing of prescriptions
- Picking stock
- Labelling items
- Checking items and bagging
- Storing bags for collection
- Handing out medication ***safely***
- Getting all scripts signed
- Complete all CD register records ***[go digital!]***
- Clearing the worktops by the end of the day!

All standard things that a qualified dispenser should be capable of and relied upon to complete without supervision.

BUT who does these tasks?

What goes on in a busy Dispensary?



Weekly Tasks:

- Date checking of specific areas
- Counting of all scripts, items and paid items – could be done daily?
- Reconciliation between paid item count with till records/ card machine – should be done daily?
- Checking and filing invoices for PA items purchased
- Chase any credits not received
- Follow up on any out-of-stock items – alternative possible prescribing?
- Check new Price Concessions and any scripts that may require amending
- Check Near Miss records for any increased/ decreased recording and any patterns.

All things that a dispensary manager or supervisor will be thinking about or completing.

Any members of the Dispensary being trained in these areas?

What goes on in a busy Dispensary?



Monthly Tasks:

- Complete Controlled Drugs stock check
- Check all script counting and finalise the end of month package to be sent off to NHSBSA.
- Completion of the FP34D Appendix for PA items – vaccinations where an Rx form not required.
- Finish the “Month End” with a reconciliation of all paid items against money taken
- SOP Updates – Should be a continuous process through the year (not all at the same time!)
- Check Wholesaler statements and rebates received
- Check new MDS deals and sign ups.
- Assess progress on DRUM’s target
- Assess progress on Audit for DSQS if started
- Update team’s training & CPD records?

All things that a dispensary manager or supervisor will be thinking about or completing.

Any members of the Dispensary being trained in these areas?

Future
Proofing:
Succession
Planning

You are running a business –
what is your dispensary
turnover per year?

“We don’t [didn’t] have time to
train anyone up...”

**Consider “shadowing” and
mentoring – act now!**



Succession Management

Who does the
task currently?



Ensuring Profitability

Discount Schemes who is
managing these?

Who speaks to the reps?

Who is tracking schemes?

Succession Management

Who does the
task currently?



Ensuring Profitability

Who is monitoring new
products with new schemes?

Who is monitoring new
generics?

Succession Management

Who does the
task currently?



Do you buy the right product
from the right supplier to
maximise profitability?

Brands
Generics

Do you look for wins – Cat C
items available as “generics”
from a shortliner.

Succession Management

Who does the
task currently?



The Changing Landscape

***Who is keeping an eye on
Pharmaceutical Needs
Assessments?***

***Threats – house building, pharmacy
application, loss of rurality... your
own pharmacy application?***

Succession Management

Who does the
task currently?



Research into Automation

Has this been seriously considered?

It may be more cost-effective than
you imagine.

Don't dismiss out of hand.

Succession Management

Who does the
task currently?



Time to act now?

Dispensing Robots

Prescription Collection Machines –
Pharmabox24

Digital CD Registers – Clara

PMR Systems [EPS] - Titan

Succession Management

Who does the
task currently?

Analysing your PCSE statement and
creating useable management
accounts?

Your most valuable data source?

What do you do with it?

Create meaningful KPIs



Succession Management

Who does the
task currently?

Do you analyse and understand
your wholesaler/buying group
statements?



Succession Management

Who does the
task currently?

Is someone checking the Drug
Tariff Preface on a monthly
basis to look at the changes?



Succession Management

Who does the
task currently?



Do you consider dispensary design and layout... and consider the use of space within the entire practice building?

Do you know how many times you handle that green piece of paper?

Do you study your actual dispensing processes [SOPs]?

Succession Management

Who does the
task currently?



SOPs [Dispensary Management
Specific? AND General SOPs]

Who keeps them up to date?

Are they fit for purpose for new
staff?

Are they followed to implement best
dispensing practice?

If you have any
further training
needs or advice

If all else fails... please get in touch!

contact@dispensingdoctorexerts.co.uk

