



THE TERRARIUM EFFECT

Building a Self-Sustaining Practice Through Durable Systems

Brian C Birch MD FAAP | 2026 PCC USER CONFERENCE

It's 6:00 PM on a Tuesday...

Your last patient left an hour ago. The charting isn't done. A billing issue from last week is unresolved, or maybe it got resolved? And there's an important task you assigned two weeks ago — did it actually happen? Or did it fall through the cracks... again?

You went into pediatrics to care for children.

BILLING ALERT

Claim denied — resubmit
Prior auth expired
\$4,200 outstanding

RINGING x3

DID THIS
HAPPEN??

Task assigned
2 weeks ago...

ERROR

EHR timeout
Reconnecting...

Dr. Birch?

What do I do when
the portal is down?
Also — scheduling?

CHART QUEUE

- Patient 1 — overdue 3h
- Patient 2 — overdue 2h
- Patient 3 — pending
- Patient 4 — pending
- + 6 more...

VOICEMAIL

14

unheard messages
oldest: 4 days ago

?

SLIDO

How long could your practice survive without your direct involvement?

A day? A week? A month? 6 months?

Put your answer in Slido now.

Two Very Different Gardens

Annual Garden

Beautiful. Fragile. Manual.

Stop watering → it wilts

Stop weeding → overrun

Go on vacation → chaos

Requires your presence every single day.

At the end of a season, you start over again!



David Latimer's Terrarium

Sealed in 1960. Opened once in 1972.

Breathes on its own

Recycles its own nutrients

Has grown for over 60 years

Virtually no external intervention.

Continues to thrive indefinitely.

Are you the annual gardener with
a watering can —
or the architect constructing a terrarium?

Start With Why

WHY

Caring for children

A calling — not just a mission statement

HOW

Values × Processes

Training, culture, workflows, systems

WHAT

Consistently great care

Every patient. Every day. Every clinician.

The Landscape Has Changed

Private Equity

More resources. Longer time horizons.

Hospital Systems

Still acquiring independent practices.

Corporate Healthcare

More leverage. Buying at scale.

Our Only Sustainable Advantage:

We can be genuinely better — better care, relationships, culture, and community connection

A great product scales.

A great system scales.

But a great leader multiplies.

Why Traditional Org Charts Fail

Traditional Org Charts

Information & decisions flow down

Problems escalate up

Problem solving disconnected from those actually experiencing the problem

An Ecosystem Instead



Every layer has a function



Every layer depends on the others



Checks built in — not just chains of command

The 6 Layer Ecosystem

6	Canopy	Stewardship Core (CEO/COO/CFO/CGO)	Mission, Margin & Mandate
5	Sensor	The Auditor	Quality & Compliance
4	Landscaper	Architects (Practice Managers)	Scalability & Systems
3	Gardener	Orchestrators (Team/Clinical Leads)	Efficiency & Flow
2	Flora	Practitioners (MAs, Clinicians, Front Desk)	Consistency & Output
1	Substrate	Technology & Infrastructure	Stability & Frictionless Tech

The Foundation: Layers 1 & 2

1

Substrate

Your EHR, practice management software, work management platform, technology stack. If the soil is wrong, nothing above it can grow.

Bad substrate kills everything

2

Flora

Your MAs, clinicians, front-desk staff. They cannot be the last line of defense against a broken process.

You may not have a staff problem. It may be a systems problem.

The Middle Layers: 3 & 4

3

Gardener

Clinical leads, team leads — managing workflow in real time. Their job is efficiency and flow.

Most common failure: authority misalignment. You promote your best person to a lead role — then give them no actual authority or coaching to do anything differently.

4

Landscaper

Practice managers and directors who design and maintain systems — not run them daily, but build the infrastructure that makes daily operations possible.

How do we onboard a new provider without the owner? How do we handle a scheduling surge? That's Architecture work.

The Upper Layers: 5 & 6

5

Sensor

An Auditor function — the layer most independent practices are missing entirely.

Ask: does what's written in your SOPs match what's actually happening? You may not have a full-time auditor, but you need an audit habit. Quarterly review, outside consultant, formal process review.

6

Canopy

Executive leadership — including a Chief Growth Officer responsible for growing the business AND the people simultaneously.

The Canopy regulates the environment. Strategy, culture, external pressures.

The Model Only Works if Feedback is Real

Flora (Layer 2)

signal reality gaps to



Gardeners

Gardeners (Layer 3)

report bottlenecks to



Architects

Architects (Layer 4)

push auditors to evaluate



Sensor

Sensor (Layer 5)

surface findings to



Canopy

Canopy (Layer 6)

adjusts the



environment

Feedback in a healthy practice isn't a suggestion box. It's the oxygen in the jar.

How Do You Actually Build It?

You don't build it all at once.

You grow it — one layer at a time.

What Is a System, Really?

A system is any organized way of operating
that gets better over time.

— Layla Pomper, *ProcessDriven*

-  Doesn't have to be perfect
-  Doesn't require a 40-page manual
-  Doesn't need expensive software
-  Just organized enough to improve

Step 1: The Process Org Chart

Traditional Org Chart

Who reports to whom?

Front desk → Practice Manager

That's hierarchy. It tells you who your boss is — not who owns an outcome.

Process Org Chart

Who owns what outcome?



Who owns: patient checked in correctly, every time?



Who owns: referrals faxed on time?



Who owns: recall outreach actually happening?

When nobody owns an outcome, everyone assumes someone else does — and it falls through the cracks. Every time.

The Building Sequence

1

Mistake Tracking

Start with honest data

2

Systemizing Snapshot

Audit what exists

3

Task Management

Centralize & make visible

4

SOPs & Process Maps

Document what works

5

Idea Tracking

Capture bottom-up intelligence

6

KPIs & Data

Instrument what you've built

Step 1: Start With Your Mistakes

Your mistakes are the most honest data your practice produces.



What to capture

- What went wrong
- What was the impact?
- What might prevent it?



What you'll find

- What breaks repeatedly
- Same step gets skipped
- Same Q answered differently



The culture shift

- From: this is someone's fault
- To: this is a process gap
- Named problems are solvable

Step 2: The Systemizing Snapshot

You cannot systemize what you cannot see.

~20%

Documented & Working

These are your foundation. Build from here.

~30%

Documented, Not Followed

Exists on paper. Ignored in practice.

~50%

Lives in Someone's Head

If that person leaves, the knowledge walks out with them.

Step 3: Centralize Your Task Management

The Principle

✗ Not in someone's email

✗ Not in a text thread

✗ Not on a sticky note

✓ **One place. Shared. Searchable. Assigned.**

You cannot manage what you cannot see — and you cannot scale what you're still tracking in your head.

SmartSuite — Live View

Check for telehealth visits	ES Erna Shackelford	To Do	1 Jun 10 ↻
Morning Huddle	ES Erna Shackelford	To Do	1 Jun 10 ↻
Closing Clinic Wed	LC Liz Cardoza	To Do	1 Jun 10 ↻
Clean & Tidy Wed	LC Liz Cardoza	To Do	1 Jun 10 ↻
Opening Clinic Wed	MG Mari Garcia	To Do	1 Jun 10 ↻
Prenatal registration	MG Mari Garcia	To Do	1 Jun 10 ↻
Newborn Chart Prep Wed	RS Ryan Sherer	To Do	1 Jun 10 ↻
2 Week Pre-visit Spruce Outreach	RS Ryan Sherer	To Do	1 Jun 10 ↻
Opening Clinic Thurs	LC Liz Cardoza	To Do	2 Jun 11 ↻
Weekly Self Assessment	LC Liz Cardoza	To Do	2 Jun 11 ↻
Clean & Tidy Thurs	MG Mari Garcia	To Do	2 Jun 10 → Jun 11 ↻

Step 4: SOPs & Process Maps

Why we don't start here:

An SOP built before steps 1–3 will document the wrong thing, be ignored, and gather dust.

SOP Formula

What is this process?

Who does each step?

What does 'done' look like?

8–15 minutes to write, not hours

Process Map Shapes

○ Circle = Start / Stop

□ Rectangle = Action step

◇ Diamond = Decision point

→ Arrow = Flow direction

Where It Lives

Where the work happens

Not 3 clicks away

Simple enough to update

Updated regularly — not annual

Steps 5 & 6: Ideas + Data

Step 5: Idea Tracking Channel

The best ideas in your practice will almost never come from the top.

 Your MA does intake 40x/week — they know exactly where it breaks

 Your front desk fields the same complaint every day

 Your clinical lead watches the same friction repeat for months

Step 6: Data

Build the system first — then instrument it.

 Staff weekly self-assessments

 Patient wait times

 No-show rates

 Billing A/R

 Patient satisfaction scores

The Part Most People Skip

Systems aren't built in sprints.
They're built in habits.

15 minutes. Weekly. Standing review.

Small. Consistent. Compounding. That's how a terrarium grows.

- 1 What broke this week? *Capture it in the mistake log*
- 2 What improved? *Acknowledge the win — systems need momentum*
- 3 What's one thing we can make better before next Friday? *Small. Specific. Assigned.*

What Breaks When Layers Don't Connect



Foggy Glass

Missing Sensor (Layer 5)

Leadership thinks everything is fine. Nobody is checking whether the process on paper matches the floor. Failures are invisible until they're a crisis.



Root Rot

Architect ↔ Substrate Gap

Beautiful process, broken substrate. The EHR can't support it. Staff are drowning in workarounds. What looks like attitude is actually a design failure.



Overgrown Jar

Canopy ↔ Gardener Gap

Growth demanded from the top without operational capacity below. Best people wilt. Turnover climbs. Numbers look okay — right up until they don't.

The architect doesn't have to be inside the ecosystem every day.

They lead by observation.

They adjust the environment when something is off.

They don't crack open the lid — because the soil doesn't need them to touch it.

It needs them to have designed it well.

Two Very Different Words

Indispensable

It breaks without you.

You are the load-bearing wall.

The system exists because you show up.

You are the watering can.

Irreplaceable

You built something that outlasts your presence.

The system exists because you designed it.

You are the architect of the glass.

This is the CEO-inspired organization

At some point, a leader decided to stop being
the burning sun their staff struggled to grow toward —

and became the architect who designs
the glass so the light naturally
reaches them all.

You designed the conditions. You built the layers. You let the system breathe.

Go Back to Your Answer

SLIDO

What's the one thing standing between your practice and running without you?

- 1 Name the one thing that gets in the way. Share it
- 2 Start there. Build a system that doesn't require you to do it.
- 3 Then the next thing. Then the next.

You have it built when there is nothing left that requires you.



Build the system that honors
your mission every single day —
with or without you in the room.

Brian C Birch MD FAAP | birch.md@tvkidsclinic.com



INFLUENCES & REFERENCES

Simon Sinek — **Start With Why** (2009)

The Why / How / What framework underpinning Section II

Michael Gerber — **The E-Myth Revisited** (1986)

The technician-vs-entrepreneur trap — the intellectual ancestor of the watering can vs. architect framing

Jim Collins — **Good to Great** (2001)

Right people, right seats — and Level 5 Leadership informing the Canopy layer

Verne Harnish — **Scaling Up (Rockefeller Habits 2.0)** (2014)

People → Strategy → Execution → Cash; meeting rhythms and the daily/weekly habit

Seth Godin — **The Song of Significance** (2023)

Work that matters; creating conditions for significance — the CGO concept and idea tracking culture

Layla Pomper — **ProcessDriven** (processdriven.co)

Direct source: system definition, SOP philosophy, and the building sequence framework

David Latimer — **The Sealed Terrarium Experiment** (1960)

Wisley, Surrey, UK. Sealed 1972; still growing. The original proof of concept.

Dan Martell — **Buy Back Your Time** (2023)

A framework for entrepreneurs to work less and achieve more.