

# Goal Driven Practice MBA

## Team Meetings

### Your Monthly Improvement Meeting

Team meetings can be very effective tools to improve practice performance.

Let's define the goal of team meetings:

#### **THE PRIMARY GOAL OF ANY TEAM MEETING IS IMPROVEMENT.**

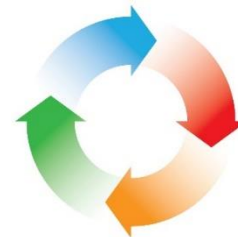
The goal of a team meeting is to improve service to patients. Meetings also improve communication and coordination.

- **Communication.** Everyone should know what each other has been working on and how they are doing. Likewise, each team member should tell others what they've been up to and how it's been going.
- **Coordination.** Projects need to be coordinated and procedures sometimes reminded.
- **Improvement.** We want and need to keep improving the quality and quantity of services.

#### **MONTHLY MEETING PROCEDURE and OUTLINE**

- \_\_\_ 1. **Clarify meeting goal.** Every three months, clarify the goal of the team meeting for everyone and the role each person must make it work.
- \_\_\_ 2. **Preliminary meeting with the manager.** At the end of the month or the very beginning of the new month, it is a good idea to first meet with your manager to review how the business did and make *preliminary* plans for improvement over the next month or two. You will then do the same exercise with the entire team at your major monthly meeting and make any adjustments to your monthly strategy at that meeting.
- \_\_\_ 3. **Monthly Team Meeting.** Everyone gets together for about an hour at the beginning of the month.
- \_\_\_ 4. **The manager runs the meeting.** The manager runs the meeting with the clinic director present.
- \_\_\_ 5. **Show and tell.** The manager asks each person, one at a time, how their month went. Each team member gives a report, including:
  - A win -- any success they had. (Hurray!)
  - Their statistics if they have them.
  - How they improved their area. (optional)
- \_\_\_ 6. **Questions, clarifications.** This is an excellent time for the clinic director, or anyone else, to ask each team member about any aspect of their report.

- \_\_\_7. **Total clinic performance.** The manager then goes over the clinic's *total* monthly performance or statistics.
- \_\_\_8. **Clinic Director.** The clinic director recognizes everybody's work and contribution and expresses gratitude. The clinic director then goes over the big picture -- how the business is generally doing. Are we headed up or down?
- \_\_\_9. **Goals Achievement Process.** With the team, the clinic director looks at what 3-5 areas of the clinic need improvement or support. This is a process we call the Goals Achievement Process. (GAP for short, as it reduces the gap between you and your goals!) This results in 3-5 major action steps during the month to improve the services, who will do them, and when. The manager records and follows up on these steps. This process is covered elsewhere, but a simple outline is as follows:
1. **Review.** Look at recent performance, primarily statistics.
  2. **Discover** what has been working.
  3. **Discover** what hasn't been working.
  4. **Document.** Keep a simple list of what works in your practice and business playbooks.
  5. **Plan.** Decide on 3-5 actions, who is responsible, and when they should be completed.
  6. **Implement.** Get these action steps done.
  7. **Schedule.** Schedule the next meeting to ensure it occurs.
- \_\_\_10. **Individual goals.** The clinic director can go around the group again and have each team member set a goal for their area. The manager takes notes.
- \_\_\_11. **Long term.** The clinic director talks about the future -- what can we expect in the next 6 months? This gives the team an idea of where they are going and fosters confidence.
- \_\_\_12. **Our Why.** The clinic director then reminds everybody about their Why and mission. Sometimes, patient testimonials can be reviewed and a discussion of why our services are so valuable.
- \_\_\_13. **Miscellaneous.** Some offices have an informal session for miscellaneous newsy items, such as somebody got a new dog, "Where's my coffee mug?," or stop leaving old food in the refrigerator. This can be inserted before #12 and #13.



### FOLLOW-UP WEEKLY MEETINGS

Each week following your initial team meeting, you can schedule short team meetings to follow up on how each area is doing.

Depending on the size of your office, the entire team can meet briefly for an abridged version of the monthly meeting to make any short-term adjustments to the monthly plan. In larger offices, departments can meet and work on improving their areas. This could mean billing, front desk, doctors and therapists.

### THE MANAGER

The manager is responsible for ensuring monthly and weekly team meetings occur on time and are productive.

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