PRACTICE MEETING SAMPLE AGENDAS

Team Meeting Sample Agenda

Weekly check-in (five minutes) - Go around the table and have everyone share some personal and business good news. You want to continue to make everyone feel part of the team, and that includes sharing personal news as well. This is the time to share your personal highlights of the past week or upcoming week. Also, share any positive news from the practice; maybe it was a positive interaction with a patient, or you learned a new technique for a procedure you perform at the practice. Don't hesitate to have fun here! Laughter certainly helps shift everyone's energy levels and often makes it more likely that you have a productive meeting.

Quarterly priorities (10 minutes) - Now go through the current metrics of your practice's quarterly priorities. Take some time to discuss where you are with each of your practice's metrics. For example, if your goal for the month is 20 "x" procedures, and this is the second week of the month, where are you? If you are halfway through the month, this may signify you have a problem and may not achieve your monthly goal. If this is the case, find out why you are at that number and get the team involved in coming up with a solution.

Patient Feedback (10 minutes) - I want everyone to be connected to the patient and to be aware of any positive or negative trends that may be happening in the clinic and with local competition. One of the metrics is that I like to track our online reviews. If you are seeing twenty or thirty patients a week, then you should expect to have two or three reviews posted. If you are not seeing any reviews, this is the time to find out why. First, only ten percent of patients typically post a review, and secondly, they only post when the experience was exceptionally good or very bad. If you don't have any reviews, that indicates your services are just average, which should not be your goal! This is also an opportunity to learn what procedures your patients are asking about that you may want to start offering at your practice. As well, maybe a procedure doesn't have a high happiness rating with your patients; this may signify either additional training from the manufacturer is needed or you may want to stop providing that treatment.

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Team Meeting Sample Agenda (cont'd)

Issue Processing (20-60 minutes) - If any bigger issues were uncovered during the daily check-in, and they are important to the practice, you should cover them. They should be scheduled as the most important issue first, since often you will run out of time in this phase of the meeting. You have your entire team together, so this is a great time to use utilize their prospective and experience to help solve your biggest problems. Sometimes people get focused on their advice, so it's a good idea to re-focus on the solution that is equally good for the patient and the practice. You are looking for a win-win solution, not one where one side clearly wins and the other side clearly loses. Since this is usually a known issue, you may want to send some pre-work or background information on the issue to the team so they can think about it before the meeting occurs. This will optimize your meeting to be more productive. In some cases, the solution or processing of the issue may take more than one meeting. If this is the case, make sure at the end of the meeting that everyone knows where you are on the issue and what is expected at the next meeting. If anyone is assigned work to do, make sure you document it on your meeting worksheet. You want to build that culture of accountability and taking responsibility.

One-on-One Team Member Sample Agenda

In Mark Horstman's book, *The Effective Manager,* he likes to have a simple agenda, where you first get your team members to speak for about ten minutes, then ten minutes for you to speak, and ten minutes to talk about the future.

When you speak, you want to take this opportunity to bring up any issues or behaviors that concern you and/or other team members. Many managers wait until the end of the year to bring up issues, and this is not a good idea. They should actually be brought up immediately, when they occur, or as close to the event as possible. If it wasn't serious, and was just a concern, then you may want to bring it up at this meeting.

Michael Bungay Stanier's book, *The Coaching Habit: Say Less, Ask More & Change the Way You Lead Forever*, has a great kick-start question you can use to start the one-to-one meeting: "What's on your mind?" Sounds very simple, and I know I had a hard time using it for the first time, but it works. The fact is, you want to know what the most important thing going on in their mind right now, and people will generally tell you what is important to them at that moment. Since it's an open-ended question, they cannot answer yes or no; they need to actually tell you. The answer will typically be either a personal or a work issue, so be prepared for either. Trust me, if the number one thing in their mind is a personal issue, like their mother is in the hospital, it will certainly affect their work and the practice. The nice thing about this question is that it gets right to the point and doesn't waste your limited time with chitchat about the weather or traffic.

One-on-One Team Member Sample Agenda (cont'd)

I know this is hard for some people, but when you give advice, you suck the air out of a room. Be quiet, nod and don't talk while your team member is talking.

Michaels' book also has a great follow-up question: "And what else?" It's important that you ask this question with genuine interest and it not sound like a pre-programmed auto-response. You may want to ask this question several times if it seems like the right thing to do. As you do this, it's similar to Toyota's "5 Why's;" it uncovers a deeper meaning, and often the team member will uncover their own solution when answering the "and what else?" question. In addition, by asking follow-up questions, you are promoting a higher level of thinking, and issues are actually more likely to be solved. To help them further clarify their issue, you can ask them questions like, "What is the real challenge here?", "What can you do to help resolve the issue?", and "How can I help?"

The next ten minutes should be you talking. If they didn't cover a previous issue they were going to work on from the last meeting, you may want to start this section with "What have you learned (or worked on) since we last met?" Hopefully, there will be closure for any previous issues, and they have identified what they did learn from that situation and resolution. In this section, you also want to make sure they are actively working on their quarterly priorities, so you can use them as a guide for the conversation. You want to bring to their attention some things they did well and any improvements you would like to see. Continue to ask questions here as well. It shouldn't feel like a lecture to your team member(s); it should feel like a conversation. However, you do want them to clearly understand that completing their priorities is an important part of their role at the practice, and you want to keep them on track.

Spend the last ten minutes talking about the future. With the previous questions, you have to shift their brain into problem-solving mode, so this is a great time to have both of you think about the future. You want your team members to be future-focused—what are they going to do this week and next week. This should be a combination of actions that are going to help the practice achieve its goals, as well as their personal goals. This acts as a motivator to people; they want to know they matter to you and the organization and that they are growing.

One-on-One Team Member Sample Agenda (cont'd)

Questions to ask:

- **“What are you shooting for in your current role?”**
- **“Do you have suggestions to help make the practice run more smoothly (or get more patients)?”**
- **“What personal goals would you like to accomplish?”**
- **“What are your future goals; what are your five-year aspirations?”**
- **“Are there any particular skills you want to learn?”**

Take notes, and also write down the commitments they are going to make and by what date. You will use these as the starting point for the future meetings.

Once a quarter, you also need to update the quarterly priorities so that they are clearly indicated. At the last one-to-one meeting before the end of the quarter, you will ask them what they think the priorities for them should be to achieve the practice’s quarterly and annual goals. By having them choose their priorities to work on, they are more likely to take ownership and achieve them.

One of the great things about having regular one-to-one team member meetings, with a clear agenda and a review of the practice and personal goals, is that you no longer need to do that dreaded annual review. In essence, you are doing the review every month. This is much better than doing a year in review and bringing up things neither of you remember very clearly.