



Team Activity

Team Activity



Series 9 / Session 12

The Exact Conversation Every Practice Must Have to Close and Start the Year

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1. Make a copy of this worksheet for each team member to use.
 2. Complete the Team Activity.
 3. Fax or email one “Master Worksheet” containing your team’s collective efforts.
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Team Activity

Now, alchemize those three questions and answers into one decisive, powerful action plan.

What decisions are we making; what will be different about the future compared to the past?

- Morning and End of Day Huddles
- Weekly Check-ins
- Monthly Snapshot
- Quarterly Goal-setting
- Reverse Engineering Our Schedule and Outcomes

What actions will we take to support our decisions?

Team Activity

Step 2 Recast the Vision

Doctor, vocalize the heart and soul of the practice.

Recast the vision.

- What's our why?
- Our purpose?
- Our mission?

As a team, update it together.

What re-visions make our vision completely up to date and ready for the year ahead?

Team Activity

Step 3 3-2-1...Go

Create targets. Then go hit them.

3

What are three global practice goals we're going to hit?

- One goal is tied to dollars.
- One is tied to patient outcomes, our evolution of treatment and clinical philosophy.
- One is tied to our team and practice culture.

2

What are two unique objectives that every department is going to hit?
