

Goal Driven Team Meetings

Getting together as a team on a regular basis is essential for any practice and business to be healthy and prosperous. But these meetings must be performed effectively, or they can be a waste of time. Here are some vital factors that will help make your meetings productive:

Purpose of Team Meetings: To help us reach our goals.

Key Functions of Team Meetings: Communication, Improvement, Coordination.

Sample Procedure:

1. **Schedule meetings.** These should be done during down times. Phones are off. No interruptions. They can be weekly with everyone, or divided into groups, for example, with everyone meeting on the 1 and 3rd weeks of every month and the doctors and support team meeting separately on the 2nd and 4th weeks. Meetings start on time!
2. **Moderator.** Decide who is going to coordinate the meeting. Ordinarily the office manager moderates the meeting to ensure that it stays on track and that all items are covered quickly and sufficiently.
3. **Preparation.** Everyone prepares. Meetings are not a place to be a spectator. Each person is expected to contribute.
4. **Each person reports.** The meeting begins with each team member giving a short report on their last period. The moderator can prompt the team member on these four categories. Also, anyone can ask the team member about any of these items. These includes:
 - a. How did it go last week/month? Struggles, successes.
 - b. Statistics, if they have them.
 - c. What are your goals for upcoming week/month?
 - d. What you are working on to improve (procedure, skill, knowledge).
5. **Business-wide report.** The CEO or office manager gives a report on how the entire business did.
6. **New improvement projects.** Based upon the short term and long-term condition of the business, decide upon 1-3 major areas that need the most improvement and work out action steps. Projects can include internal marketing, external marketing, retention, collections, etc. Be as specific a possible. Base projects on objective indicators – stats, events, etc. Each project needs: Who is in charge, who is doing what, and when it is to be done.
7. **Earlier active projects:** Moderator calls on those in charge of earlier projects and gets a report. Details are coordinated. This could be marketing, case management, etc.
8. **Upcoming monthly/weekly office-wide goals agreed upon.** (How many visits, NPs, etc.)
9. **Review and or recite mission.**

That's it!