

Study and Assignment Guide

Week 6 Class 5

POLICIES, PROCEDURES AND INDIVIDUAL TEAM MEMBER IMPROVEMENT

A. Function and Structure.

1. Describe how *function* and *structure* relate to policies, procedures, and team members and how this applies to your practice.

B. Policies and Procedures.

1. What is the difference between a policy and a procedure – in your practice?
2. What is procedural atrophy, and how do you prevent it?
3. As a management tool, how can written policies and procedures help you improve team member performance?
4. Mock up a simple job checklist for a minor role in your office or at home, and fax it back.

C. Improving Team Member Performance

1. Give me an idea of what Self-Determination Theory is.
2. Do a coaching review with a team member. This could include your clinic director or doctor.

D. Principles: Read the *Goal Driven Principles* and consider how they apply to your office.

1. #7 *Communication*
2. #8. *Collaboration and Self-Organization Works Better.*
3. #9 *The Bridge to Your Goals.*
4. #11. *Keep it Simple, Make it Simpler*
5. #19. *Roles*

E. Videos.

1. Watch the video *Green and Clean* – by Steven Covey (4 min)
2. Watch the video on Job Checklist by Ed Petty (11 minutes). Optional.

F. The *Goal Driven Business*.

1. Read Chapter on Stage 3 (Pages 141-174). Finish as soon as possible, but by November 20.

G. Individual Share Sessions. Complete at least one individual share session this week.

H. Clinic Director Briefing

1. Discuss with your doctor how your office compares the old model of practice management to the new one, using the 3 Goals example, Self-Determination Theory, and/or Gallup's information. Find at least one factor that is still part of the old model and one element of your practice that is, or is becoming, part of the new model.
2. Brief your clinic director on other portions of the class.

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Answer and Worksheet
Class #5 POLICIES, PROCEDURES, AND
INDIVIDUAL TEAM MEMBER IMPROVEMENT

Please write (legibly please) your answers or what you did for the assignments in Class #5. Have your clinic Director sign below and fax or email us when completed. Try to get it back to us by Tuesday before the next class.

Thank YOU!

Fax: 1(877) 868-0909 Email: Services@GoalDriven.com

A. Function and Structure.

1. Describe how *function* and *structure* relate to policies, procedures, and team members and how this applies to your practice.

B. Policies and Procedures.

1. What is the difference between a policy and a procedure – in your practice?
2. What is *procedural atrophy*, and how do you prevent it?
3. Mock up a simple job checklist for a minor role in your office or at home, and fax it back. **DONE: _____**

C. Improving Team Member Performance

1. As a management tool, how can written policies and procedures help you improve team member performance?
2. Give me an idea of what Self-Determination Theory is and how you can use it to improve team member performance.
3. Do a coaching review with a team member. (This could include your clinic director or doctor.) **DONE: _____**
4. At our next meeting, tell the class how it went. **DONE: _____**

D. Principles: Read the *Goal Driven Principles* and consider how they apply to your office.

1. #7 *Communication* **DONE: _____**
2. #8. *Collaboration and Self-Organization Works Better.* **DONE: _____**
3. #9 *The Bridge to Your Goals.* **DONE: _____**
4. #11. *Keep it Simple, Make it Simpler* **DONE: _____**
5. #19. *Roles* **DONE: _____**

E. Videos.

1. Watch the video *Green and Clean* – by Steven Covey (4 min) **DONE:** _____
2. Watch the video on Job Checklist by Ed Petty (11 min.) Optional. **DONE:** _____

F. The *Goal Driven Business*.

1. Read Chapter on Stage 3 (Pages 141-174). Finish as soon as possible, but by November 20. **DONE:** _____

G. Individual Share Sessions. Complete at least one individual share session this week.

Done! ___ With whom? _____

H. Clinic Director Briefing

1. Discuss with your clinic director how your office compares the old model of practice management to the new one. Find at least one factor that is still part of the old model (See page 149 of *The Goal Driven Business*.) and one element of your practice that is, or is becoming, part of the new model. (See page 155. Also, the info from Gallup.)
 - a. What did you find that was still part of the old model?

 - b. What did you find that was part of, or becoming part of, the new model?

2. Explain (teach) your clinic director in your own words the topics you covered in your answers above and anything else covered in this first class.

Yep! Our manager did a great job briefing me on the material she learned and how to use it.

Student Name: _____ **Clinic Director: Initial/signed:** _____