



Initial Team Meeting Agenda (New Practice/New Ownership)

2.5-hour Agenda

Ice Breaker (15 min)

Ice breakers set a tone for open communication throughout the meeting, rather than creating a “lecture-style” meeting that allows the staff to stay in a passive mode. Ice breakers set a tone for active communicating.

EXAMPLES OF ICE-BREAKER QUESTIONS INCLUDE :

- Please share one of your “bucket list” items
- What is the best advice you ever received?
- What made you chose the dental field as a profession?
- What is one thing you have accomplished that you are most proud of?
- You can move around the room, so everyone answers according to where they are seated
- You can toss a soft ball to the 1st person and let them toss it to the next person to answer; make sure everyone gets a chance to speak

Practice Vision (10 min.)

The Practice vision should be written ahead of the meeting and shared with the staff

- It is most effective to read the vision twice to allow for greater impact
- You can also provide copies to allow staff to read it and reflect.
- Please see example vision statements as you author your personalized vision
- The vision statement should be displayed in a staff-only area of the practice, such as a breakroom.

Owner roles (10 min.)

Define individual roles for practices with more than one Owner/Partner/Associate

- It is common to have a “managing partner” that handles the day-to-day activities, including staffing
- See “Roles defined document” if you are dividing managerial duties.
- This clarification is very helpful for the staff

Mission Statement (30 min.)

The Mission statement is written by the staff as a team and based on the Vision Statement.

The Mission statement should be framed and displayed in a patient viewing area, such as the reception area. Keep this in mind when writing the mission.

- It can be helpful to delegate 1 person as the scribe who can utilize a whiteboard during the process.
- Make a list of adjectives that describes your practice (caring, gentle, high tech. etc)
- Weave the adjectives into the mission statement.
- The statement should be concise, thorough and meaningful.
- See example mission statements
- Team buy-in is much greater when they take an active part in writing this statement

Team Agreements (20 min.)

Team agreements are written by the staff; they help define the parameters that everyone is comfortable working in.

- Plan to limit the team agreements to 5-10 individual statements
- See the “team agreements example” document. Allow staff to read through these examples as they come up with the top 5-10 that are important for your working environment to be successful.

Staff Performance Review Forms (5 min.)

It is helpful to provide each team member with the staff performance review form you be using for future reviews. This sets up each team member for success as they learn what is important to you.

Bonus Structure (15 min.)

Optional – define any bonus structure you are offering as well as Production/Collection goals

Annual Calendar (10 min.)

Optional – review open/closed days for the year if applicable.

Employee Manual/Benefits Review (15 min.)

Optional – review any changes for the coming year

Q&A (15 min.)