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CREATING NEW AGREEMENTS, POLICIES, & SYSTEMS

DESCRIPTION

(WHAT & WHY):

The purpose of creating agreements through a policy, system, or checklist is to increase effectiveness and align our actions with our declared vision and values. When written agreements are incorporated around functions rather than people, the practice vision becomes easier to attain and our priorities become easier to accomplish. Without written agreements, it is difficult for current team members to stay accountable, train new team members, or measure progress. The consistency and predictability afforded by these agreements will improve our communication, efficiency, and success.

WHERE:

Policies, systems, and checklists will be stored in two folders:

1. A digital copy placed in the folder titled "Agreements, Policies, & Systems" (ACT folder on Google Drive).
2. A printed, signed copy placed in the ACT Binder which is located ______________ .

WHO:

All team members will be responsible for creating, implementing, and monitoring all agreements. When the final draft is approved by all team members, each member will sign the final draft to show they are committed to the agreement.

WHEN:

During the Practice Development time in weekly team meetings, new agreements will be drafted. Drafted agreements will receive feedback (see 80% approach tool in your ACT Dental Planning Session Workbook). Final agreements, policies, systems, and checklists will be signed.

HOW:

Getting started! There are a few more questions to answer before you are ready to start writing your future systems. Here are some final items to consider. Complete the How section of this system by answering the following:

1 As a team, review or reread the article in the Planning Session Workbook about the 80% Approach to writing Systems, Policies, and Checklists.

2 Will the team utilize one of the ACT Sample System Templates or a new custom template? - If custom, who and when will this be done?

3 What font type and size will you use? (Details matter!)

4 What items will need to be available to team members tasked with writing the new agreements? i.e.- laptops, iPads, manuals, large white paper post-its, etc.

5 How will everyone sign the final draft? (At the following meeting? By posting on a communication board?)

6 When a system is not working, who will lead that conversation? What are the consequences of not following the system?

***See below for thoughts on how to engage team in behavior alignment:**

a Consider a whole team review of the system first to determine where lack of clarity may exist. ‘Why aren’t we doing this the way we agreed?’ Use the “Analyzing Existing Systems” tool to create new agreements so you can decide if it’s a system issue or a people issue.

b Ask for 1 to 1 conversation with team members to review the system privately and determine why. Come up with agreements on what can be different.

c Really learn to ask questions about why a policy, system, or checklist isn’t working and commit to the discipline of making changes. Remember focus on progress not perfection.

BEST RESULT

What is possible if this works?

POSSIBLE CHALLENGES

What is possible if this doesn’t work?

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NEED HELP?

USE THIS SYSTEM AND CHECKLIST SUPPORT GUIDE

Working with your team to create and implement systems and checklists is key for building a solid foundation in the practice. The following guide will help facilitate this process by engaging the team in productive brainstorming sessions. The result of these conversations will develop checklists and systems that will help the team and practice thrive.

1. Always begin with the why! What is the reason that this system is needed in your office and what purpose will it serve to move the practice forward. Hold each other accountable. What might be the consequence if the system isn't followed?

2. This process is best done together, as a team. Implementation will not be successful if the entire group isn't engaged and embracing it. If there's no weigh in, there's no buy-in.

3. Brainstorm about what you're currently doing to support your objective. What practices do you want to keep, and what do you need to change.

4. What steps can be taken that are specific, measurable, and actionable to help achieve your goal? Don't be afraid to dive in! Remember that even simple actions can have big impacts.

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5 Identify the key players in charge of implementing the system; who is going to OWN it? Who must take notes and type out the system? Since a complicated system might take weeks to process through, it's best to assign one specific person to see it through to the end. This person is also in charge of making edits as the system evolves!

6 Try to anticipate problems that may arise, this way you are less likely to get stuck when they do.

7 Is there a time frame or frequency that must be followed for maximum output and success?

8 What's the best way to create a finished system here? Will a checklist suffice, or is a more in-depth "how to" document needed? In other words, what does the complete process look like from start to finish?

9 Ask good questions, then ask more, and be engaged! In the end, an all in commitment from the team is crucial to move forward TOGETHER for success!

10 Implement a timeline for reevaluating your new system to identify what worked and didn't work. This will be a work in progress that will change and grow as your practice does.

11 Consider posting your 1-page system in bullet point format as a reminder of the steps. Old habits are hard to break. Keep your system posted for a month until it becomes almost automatic.

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