Effective Vision & Accountability Sessions
a.k.a 'team meetings'

How can we get the most out of our vision sessions?

- **Rotate Facilitators** – everyone on the team should have the opportunity to facilitate meetings on a regular basis in an effort to get everyone involved. This does NOT mean you come up with all of the content as the facilitator. It simply means you address the agenda, keep the team on track by bringing everyone to solution and coming up with 'action' based on your discussion.

- **One hour per week**, mid week, 1st hour of production

- **Post an agenda** each week so that you can go into the team meeting with organization. As the team thinks of items that should be addressed throughout the week leading up to the vision session, jot it down on the posted agenda. When the time comes for the session, if it's not on the agenda, do not talk about it. This allows for forethought and organization. It's a great agreement for everyone on the team to contribute to the agenda each week – even if you don't have a specific challenge, you can always post something positive – maybe it's a marketing idea, and article you want to share, or patient testimonial.

- **Record an action plan**. For every challenge, you should come up with a task moving forward. What is your plan to over come the challenge? Who will be the 'go to' person? What is your target date? The action plan is an ongoing accountability tool. Without a specific contact person and target date, you end up talking about 20 things, but rarely move forward.

- **Keep a vision session notebook** – All agendas, action plans and monitors can be recorded for future reference.

Format For Vision Sessions –

1) 1st 15 Minutes - **Roleplay or view video footage**– set a timer and go! Don't talk about it or overanalyze – this is 15 minutes or pure roleplay. The facilitator gets to choose a scenario to roleplay or bring their own video of patient interaction to share.

2) 5 minutes - **Ask 'What's going well?** Focus on what you WANT to have happen. Everyone on the team should contribute.

3) 10 minutes - **Review monitors /statistics**– where are we in relation to our goal? Where should we be? Facilitators – print out a copy for each team member ahead of time.

4) 5-10 minutes - **Review action plan** each week as an accountability tool – remember three columns – task, contact person and target date. Are we on track with our 'to do' list?

5) 15 minutes - **Address New Agenda Items** – remember the agenda that the team contributed to throughout the week? Come up with solutions – if it's not on the agenda, we don't discuss it. Table non-agenda items for the next session. If nobody contributes to the agenda (this may happen the first week or two), you have 20 more minutes to roleplay!!

6) 5-10 minutes **Review Brady Group Resources/ Revisit Vision and Agreements**. Don't simply read the vision and agreements, but rather read one sentence of the vision each week, and one agreement each week. Ask yourselves the following questions…. 1. How did we do this past week? (share real examples) 2. What do we need to do better this upcoming week to further fulfill this sentence of the vision/ this agreement?

VISION SESSION AGENDA

Date: 　　　　**Facilitator:**

Role Play 10 min
What's going well 5 min
Scoreboard update 5 min
Review Action Items (5-10)

Agenda Topics

- ✓
- ✓
- ✓
- ✓
- ✓

Solutions/Action Items

- ✓ Add to your Action Plan

Review Brady Support materials if time allows

- ✓ Refer to Systems Playbook, or consult your coach

Other Information - items to discuss next time

ACTION PLAN

Date ______________________________

TASK	CONTACT PERSON	TARGET DATE