

As you wind down the year, it's a great time for a 'reboot' - especially before the busyness of the holiday season kicks in. This is a great tool to help prepare for success as you anticipate 2025! Keep these things in mind as you get ready for a productive day together.

This packet and associated links contain literally hundreds of resources. You will not be able to get through everything, so it's essential that you plan ahead and identify what you want to include to ensure an effective use of everyone's time.

Start by scheduling an extended Vision and Accountability session between now and mid-January - plan to meet for a full day, away from the distractions of the office.

### Plan your day!

Your time is too precious to simply wing it. Get everyone involved - each team member should have the opportunity to contribute by planning a meal, choosing a team building exercise, or orchestrating a roleplaying session.

- 1. **What about food?** I mean, isn't that why we have meetings?? Get everyone involved. Pot luck, team prepared meal in the practice kitchen or delivery. Whatever you do, plan ahead of time instead of spending 30 minutes trying to decide what to do.
- 2. Start the day with a fun team building activity

- 3. Doctor share your State of the Practice address
  - a. As the leader, what went well from your point of view?
  - b. Individual acknowledgements
  - c. Review numbers
  - d. What do you want to see happen in 2025? Remember to spend the majority of your time focusing on what you want to have happen, rather than what didn't go well in 2024.
  - e. This the perfect time to reinforce and refine the practice vision.
- 4. Ask each team member to come prepared to share their personal goals and what they would like to see happen in the practice over the next year. Goals from just the leader are not sufficient. it's vital for the entire team to have ownership in the future of the practice after all, it can be a vehicle to help members of the team achieve their personal vision.
- 5. **Lunch Eat together.** Don't talk about anything office related. Use this time to connect
- 6. **Time for another team building activity!** Mid-day during or right after lunch choose another fun team building activity
- 7. Complete the Systems Check up as a team (in this packet.
- 8. Choose how to spend the rest of your time based on your vision and areas in which you'd like to focus. Here are some options...
  - a. Create your Annual Marketing Plan
  - b. Roleplay
  - c. Get out of the office for a fun team activity
- 9. **Next Steps Be specific with the 'what' and the 'why' -** empower your team to come up with the 'how'. Utilize your <u>Action plan</u> to ensure follow-through.

### Looking for resources or training tools?

Check out our All-Access Systems Playbook

All Access Training Platform

Training Video Master List with links

#### **GOALS**

GO POINT INSTRUCTIONS

#### **PLANNING**

- BRADY GROUP EVENT CALENDAR
- HOW TO SET UP CYCLES

#### TEAM BUILDING

- TEAM BUILDING ACTIVITIES
- <u>Ideal Team Player Summary</u>
- Ideal Team Player Self-Assessment
- Ideal Team Player Model
- VISION BOARD EXERCISE

### SUGGESTED READING LIST

ANNUAL MARKETING PLAN PACKET

Can't find what you're looking for? Let me help! <u>amy@bradygroupllc.com</u>

## Calendar for Year 2025 (United States)

# January Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

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### Holidays and Observances:

Jan 1	New Year's Day	May 5	Cinco de Mayo	Oct 31	Halloween
Jan 20	Martin Luther King Jr. Day	May 11	Mother's Day	Nov 4	Election Day
Jan 20	Inauguration Day (DC, MD*, VA*)	May 26	Memorial Day	Nov 11	Veterans Day
Feb 14	Valentine's Day	Jun 14	Flag Day	Nov 27	Thanksgiving Day
Feb 17	Presidents' Day	Jun 15	Father's Day	Nov 28	Black Friday
Mar 17	St. Patrick's Day	Jun 19	Juneteenth	Dec 24	Christmas Eve
Apr 15	Tax Day	Jul 4	Independence Day	Dec 25	Christmas Day
Apr 20	Easter Sunday	Sep 1	Labor Day	Dec 31	New Year's Eve

Oct 13 Columbus Day

### SYSTEMS 'CHECK-UP'

Fundamental systems are a crucial part of practice growththe following are elements that ought to be fully integrated into your routine before you see long-lasting, consistent success. For some of you, these systems are new and some even unfamiliar. For Brady Group veterans, be cautious. While you may 'know' all of these systems, how well are you doing each of them?

# Rate each system on a scale of 1-5 (1 = non-existent, 5 = full implementation)

1.	Vision—while the practice vision can certainly evolve, you have written it in a way that it answers questions about how to operate on a day to day basis – the team is aware of the vision and we revisit it weekly in our team meetings. The vision is up to date and relevant.
2.	Team Agreements - we have developed and updated 10 -12 relevant team agreements that are necessary to make this a wonderful place to work with courtesy, honesty and fairness. Each team member has signed the agreements and we revisit them at our weekly team meetings.
3.	We have figured an up-to-date Go Point for our practice based on current total employee costs. We all understand the origin of this number and have assigned team members to figure it daily/per cycle.
4.	Our team is compensated with a monthly salary that stays consistent so that our Go Point is always the same.

5.	We have figured cycle/daily/hourly goals for our practice -
	this number is greater than our Go Point number and we are all
	aware of where we are on a daily basis in relation to our goals.
6.	As a team we have embraced the scoreboard/monitoring
	system. Everyone on the team contributes by gathering different
	stats to contribute. The monitors are up to date and every team
	member can easily access and interpret the monitors. We use them
	as a measuring stick for the practice on a daily basis.
7.	We have planned our 2025 calendar - we are operating
	under the cycle system, with 12 equal cycles. We have allotted time
	for Brady events, as well as additional CE. We are working less days
	in 2023 than we have in past years.
8.	We have a standing time set for regularly scheduled ZOOM
	sessions with our personal coach.
9.	We have morning huddles that everyone attends, are
	well-prepared for, and allow us to map out our day and focus so
	that we have the best chance of accomplishing our goals possible.
10	We have evening huddles that everyone attends – the
	objective of our evening huddle is accountability (did we
	accomplish the goals set forth in the am huddle?) and celebration.
	We do not dwell on what didn't go well, but rather what DID go
	well, and use the time to recognize others.
11	We hald a weekly hour long vision and accountability
11	
	session that is facilitated by a different team member each week,
	focused on solution, and results in an action plan that allows us to move closer to our objectives.

	We have time scheduled weekly to role-play and fine-tune our communication skills.
	<b>We look the part.</b> We wear matching scrubs/lab coats that are pressed and clean (clinical team). Our doctor and front desk goddess wear professional business attire. We arrive with makeup applied, hair fixed, and looking fresh and professional.
	We video record and view patient interaction at least once a week. (all team members)
	<b>We have a 'perfect day' scheduling template</b> based on the Patient Reservation System and we consistently follow the template.
	We can schedule a new patient within a week because we have properly blocked the time.
	We have implemented 2-3 third-party financing sources. for those who do not have the means to pre-pay for their treatment.
	Our Doctor quotes the fee with confidence for treatment to patients.
	<b>We have raised our fees</b> in the last 12 months by at least 5%.
20.	We have a simplified written financial agreement form that does not incorporate details regarding treatment.

21	If we are involved in PPO's, we have gathered factual information and evaluated the impact on our practice and have a plan in place to minimize our involvement with PPO's.
22	Patients prepay for treatment on a regular basis.
23	We conduct new patient interviews in the consultation room that do NOT begin with a clipboard and filling out paperwork.
24	<b>We take photos</b> on ALL new patients and all returning patients that have potential for treatment.
25	We give all patients with the potential for treatment a planning appointment opportunity – we have at least one planning appointments per day with the right intention.
26	We have a healthy team culture based on trust.
27	We are readers. We understand that reading books on communication, business, marketing, culture and self-improvement don't only benefit the practice, but help us grow as individuals. We read a minimum of one book a quarter as a team.
28	Entire team opens <b>support emails</b> from the Brady Group
29	All-Access Systems Playbook (and is taking advantage of the new printable tools and resources, training packets and videos available)
30	Everyone on the team has <b>joined the Brady Group</b>

Yes, you should measure against the goal, but that's not how you reach the goal. You reach the goal by measuring the activities and behaviors that drive that needle.

## - Henry Cloud

1. Begin with the end in mind—what is our 'desired future state' by the end of 2025?

2. What must be true that isn't today in order for us to achieve our desired future state by the end of 2025?

### What are our monetary goals?

	EACH CYCLE	.EACH DAY
COLLECTION	п	1
PRODUCTION	п	
NET PRODUCTION		

What is our Additional Earned Income Goal?				
	_ PER CYCLE			
Goals for A/R	17			
	•			
90 Days	_ 6 Months	_ 12 Months		
How many d	ays are we goi	ng to see patients in 2025?*		
12 cycles of	days each = _	total patient days in 2025		

<sup>\*</sup> Hopefully you are scheduling less days in 2025 than you have in years past-(some of you are already at 11-12 days/cycle, so you may be looking to be more effective with that time rather than cut back more at this point). Remember, it's not about the hours you work. It's about what you put into the hours. If you are working more than 14 days per cycle, and don't think you can be effective in less days, it's a systems issue rather than a time issue.

How will we serve others in 2025?		
What will we do to give back to our community?		
What will we do to show appreciation to our patients?		
How are we going to get involved in helping those in need?		
Is there a special deserving patient that we'd like to support through dentistry?		
What CE will we incorporate into our schedule in 2025?		

# In the year 2025 the Brady Group and our personal coach can best support us in the following manner –

We understand that progress is a process, not an event. We commit to changing/improving/implementing the following three things in the next 30 days and will support and hold each other accountable for follow through.

Each month we will re-evaluate our 3 things.

- 1.
- 2.
- 3.

As your personal coach, I'd love to know what you come up with – please email your completed check up to me asap – I look forward to supporting you however I can.

Amy