



STATE *of the* PRACTICE

2025

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 [Action plan](#) 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](#)
- [Ideal Team Player Summary](#)
- [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! amy@bradygroupllc.com

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	February 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	March 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
Apr 21 Easter Monday	Oct 13 Columbus Day	

SYSTEMS 'CHECK-UP'

Fundamental systems are a crucial part of practice growth- the 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 hold a weekly, hour-long vision and accountability 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.

12. _____ **We have time scheduled weekly to role-play** and fine-tune our communication skills.
13. _____ **We look the part.** 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.
14. _____ **We video record and view patient interaction** at least once a week. (all team members)
15. _____ **We have a 'perfect day' scheduling template** based on the Patient Reservation System and we consistently follow the template.
16. _____ **We can schedule a new patient within a week** because we have properly blocked the time.
17. _____ **We have implemented 2-3 third-party financing sources.** for those who do not have the means to pre-pay for their treatment.
18. _____ **Our Doctor quotes the fee** with confidence for treatment to patients.
19. _____ **We have raised our fees** 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. _____ **We take photos** 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 **support emails** from the Brady Group
29. _____ Everyone on the team has **accessed the Brady Group 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 **joined the Brady Group 'All-Access' Community on Facebook** – (search Brady Group All Access from your Facebook page)

**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		
PRODUCTION		
NET PRODUCTION		

What is our Additional Earned Income Goal?

_____ PER CYCLE

Goals for A/R?

90 Days _____ 6 Months _____ 12 Months _____

How many days are we going to see patients in 2025?*

12 cycles of _____ days each = _____ total patient days in 2025

* 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