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SYSTEMS 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 re-evaluating 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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