

Typical 2 Day Retreat Agenda

Walk Around - As a group, walk through all parts of the office and let those who work in each area talk about it. Maybe simulate a patient visit. As a lot of , "What if....?" questions.

State of the Practice - The doctor and / or Office Manager should report how things are going. Budget, Scheduling, Future Plans, etc. Power Point is best. Must be prepared in advance.

Brain- Storming - This activity can be limited to certain areas of the practice or "no limits." Anybody shouts out anything they feel the practice should be striving for and it is documented on a flip chart. (Be sure to number them as you go.)

Purge /Merge - Now look through the goals and get rid of the silly ones and put all of the related ones together. (This is why you numbered them.)

Prioritize - Which 3 - 5 groups of goals are the most critical to work on right now?
Save the rest for later.

Plan: - Assign tasks and responsibility to individuals with timelines that will allow the goals to be accomplished.

Schedule the next retreat.

Go have some fun as a group:

Go to a movie, play Putt-Putt, go walk in a park, anything.

There are hundreds of other useful activities that can be helpful at a company retreat. Some are: SWOT Analysis, Complete Review of the Process Guide, Writing / Re/Writing a Mission Statement, Development of Hedgehog Concept.

It is also a good opportunity to have a workshop about technical matters that affect all staff can benefit from, Frame Adjustment, Insurance Matters, Communication Skills, financial concerns.

Some retreats include the entire staff. Some practices, especially larger practices with several locations, benefit from smaller retreats. Managers Retreat, Optical Retreat, Branch Retreat. The purpose is improved communication and alignment toward the company goals and objectives.