



PATIENT VISIT REDESIGN™

Team Work Session CueCard

Tips on How to Work Together Effectively

1. Preparation: Work Session Scheduling & Space

- q Is the work session scheduled at a time that will minimize the probability of team members arriving late? Sessions should be four hours in length.
- q Does the work session space afford privacy, encourage creativity, and discourage interruptions? If not, find an alternative space, even if it's off-site.
- q Do you have a flip chart or white board and fresh markers in the room? A flip chart is better. If you don't have one, purchase one from budgeted funds. Don't buy the flimsiest kind ("A" frames with no support for the paper pad.) A good solid flip chart can be purchased at Office Depot for about \$100.
- q Is someone bringing some snacks for work session energy?
- q Did you post your favorite "prompts" around the room, e.g., trackings you did in the [Patient Visit Tracking Exercise](#), maps from the [Patient Visit Mapping Exercise](#), the ideal patient visit (from the [Ideal Patient Visit exercise](#))?



NOTES

2. Golden Beginnings

- q Did all team members arrive on time for the work session?
- q Did team members check in with each other ("Hey, how are you doing today?") and did team members give honest replies?
- q Is it clear who is facilitating the session (Team Leader or designated facilitator)?

- ❑ The facilitator asks: “What are we trying to achieve by the end of this work session?” These objectives should be written on flipchart paper and posted in a very visible place on the wall. The objectives should be few in number and very clear.

3. The Work Session

- ❑ Your first assignment is to review your redesign model and put your creative talents to work in completing it.
- ❑ Your second assignment, if there is time, is to prepare to run the first test of your redesign model. What do you need to put in place to test a new way of seeing patients? Use your redesign model to “walk through” the patient visit step by step. What are the roles for each team member? How will you communicate? Do you need to supply the exam rooms differently from how they currently are?
- ❑ If you get bogged down on an issue, create a flipchart “parking lot” where you list the issue so you won’t forget it, but then move on and return to the parking lot towards the end of the work session. To be creative, you need momentum.
- ❑ The facilitator makes sure everyone is participating. If a team member is not contributing, the facilitator needs to draw that team member into the discussion. Ask quiet members for their thoughts. Every team member has an obligation to make a significant contribution to moving the team forward in its work. Have you made your contribution yet?
- ❑ Remember to “disagree and commit”. In other words, discuss a topic and even disagree about it, but then come to a team decision and close ranks behind the decision. Be clear about your decisions. Learn to trust the judgment of the team.
- ❑ Halfway through the work session, the facilitator calls for a “time-process check”. Team members assess whether the objectives still make sense and whether the team is using its time wisely to achieve its objectives.
- ❑ Towards the end of the work session, the team returns to the “parking lot” to see if any headway can be made on those issues.

- q At the end of the meeting, get a quick assessment from each team member about how the work session felt and whether it was productive.
- q Give yourselves a little round of applause!

Beware Lencioni's Five Dysfunctions of Teams

- q **Absence of trust.** Teamwork begins with sincere and honest exchanges of opinion and feelings. Keep all team conversations confidential so sharing continues to flourish.
- q **Fear of conflict.** Artificial harmony can be maintained only at the expense of results. Constructive conflict and creative tension are essential for innovation.
- q **Lack of commitment.** Agree to “disagree and commit”. In other words, you have a commitment to “weigh in” and voice your opinion and feelings, but the team decision does not have to be shaped around your misgivings. As long as team members listened carefully, trust your team members’ instincts if they don’t agree with you fully. Don’t demand that your opinion become the team’s decision. It’s not a contest; it’s a search for the best answers to problems.
- q **Avoidance of Accountability.** We have to hold each other accountable for doing the things we signed up to do, for high standards of performance, and for exemplary team behavior—even if it means moments of discomfort.
- q **Inattention to results.** You may see it in this work session. Are team members working conscientiously towards those objectives for this session that were defined earlier, or are team members more focused on themselves or just generally distracted?
- q If you think any of these behaviors are in evidence during the work session, ask for a “process check” and share your observations with the team and see if your teammates agree.