team meetings
CPR TO REVIVE YOUR VETERINARY TEAM

A product of the AVMA Future Leaders Program of 2016-17
Workplace Culture:

“Culture is the character and personality of your organization. It's what makes your organization unique and is the sum of its values, traditions, beliefs, interactions, behaviors, and attitudes.”

Veterinary businesses definitely have workplace cultures. From a small clinic to a state-of-the-art tertiary referral hospital to production animal medicine practices, universities and industry – workplace “culture” is both a tangible and intangible concept; it’s the “vibe” of the place. To be sure, many workplaces try to purposefully create a harmonious and collegial environment. Unfortunately, it is easier to recognize a dysfunctional or toxic workplace culture than it is to determine how to craft or steer toward a positive workplace culture.

It can be a challenge once the “vibe” of an organization is entrenched – but working to shift the culture towards healthier habits is well worth it. Just spend one day on veterinary-specific social media sources and the reasons to shift towards a positive culture will be evident. From changing veterinary business environments to poor employee retention, compassion fatigue, burn-out, and even suicide – these are all reasons to create a healthier workplace.

There are few veterinary-specific resources, but interest and research into this area is growing. The American Animal Hospital Association recently published a white paper analyzing the relationships between organizational culture and veterinary practice metrics. Major conclusions included, not surprisingly, that positive perceptions of leadership skills, teamwork, staffing, and even the relationships with veterinarians were all correlated with higher practice metrics. Other veterinary publications have also highlighted the impact of culture on a veterinary workplace.

An intentional re-shaping of workplace culture must incorporate active communication with an effort to reduce conflict and promote unity. Generally, people are well-meaning but entrenched within habits that may not be sufficiently serving their colleagues or the veterinary workplace. First, it is necessary to recognize and acknowledge the actions your staff are already taking to make the workday go well. Second, your team must realize that you understand and appreciate their current efforts. Third, understand that you are essentially coming to them with a request that they do more work to change habits that seem to have served them well. It is wise to solicit feedback on any habits you have that are not working for others, and it is important to create a safe way for people to tell you what is not working for them.

Only inside a framework of moving forward together will your team be willing to undertake the daily effort to change existing habits. Within that framework, you can then create the call-to-action, highlighting the gap between where your culture is today and what you see is possible. Compassion and kindness on your part are vital. As the leader of change, you will be scrutinized to see whether you, too, are changing what the team identifies as your not-so-useful habits. Acknowledge to your team that changes are initially hard (slipping back into old habits will be common at first), but with team buy-in and support, new ways of behaving will become second nature in time.

The intent of CPR to Revive Your Veterinary Team is to add to the growing body of resources on creating a positive veterinary workplace culture. Tips to consider: conduct a culture assessment, coach and encourage coaching, lead by example, and recruit for a cultural fit. Incorporating these and other recommendations, we developed three individual toolkits in the focus areas of new hire training, performance feedback, and team meetings:

New Hire Training: Connect with your hires
Coordinate & Promote Relationships
Feedback: Provide Effective Feedback
Cultivate, Prepare, Receive
Meetings: Resuscitate Team Meetings
Communicate, Participate, Reward

This document will aid you in your efforts, and we hope it will also pique your interest in delving more deeply into other resources.

References
TEAM MEETINGS

This toolkit is meant to provide guidance on directing team meetings, for all veterinary fields from private practice to academia groups to corporations. It is designed to assist with preparing for a meeting, conducting the meeting itself, and creating a follow-up plan to maximize efforts and results. Templates for sample agendas and minutes are included.

TABLE OF CONTENTS

C.P.R. TO RESUSCITATE YOUR VETERINARY TEAM MEETINGS .. 4
PREPARING FOR YOUR TEAM MEETING .......................... 6
PREPARING FOR YOUR TEAM MEETING .......................... 7
  Checklist ........................................................ 7
  Template—Sample meeting agenda ............................ 8
POST-OP CARE FOR YOUR VETERINARY TEAM MEETING ...... 9
C.P.R. To Resuscitate Your Veterinary Team Meetings

OVERVIEW

In our veterinary fields, team meetings often become mundane and inefficient due to lack of structure. Successful team meetings provide opportunities for success, but they also require an investment of time and effort. With the proper communication skills, collaboration, and motivation, a veterinary team will be able to overcome complex problems and develop productive solutions. You can follow these important guidelines to help revive the efficiency and effectiveness of your next meeting.

COMMUNICATION

An effective and clear communication structure improves efficiency, productivity and consistency by keeping everyone on the same page. The leader of the meeting should set expectations and goals at the beginning, including what you hope the meeting accomplishes, meeting rules, and how participants should participate. Using a great agenda and following it consistently will help the communication moving forward and staying on track. Be prepared to handle conflicts by encouraging dialogue without judgement and setting ground rules for communication during the meeting.

TRY THIS:

- Establish meeting rules:
  - No laptops or phones.
  - No interruptions. Use answering machines for phone calls.
  - Leader can call a time-out if conflicts get out-of-hand.
  - Questions can be asked to explore viewpoints, not opinions.
- Create an agenda: Use a timer for each topic and have a form of accountability. Make sure the agenda covers all current, new, and future topics. Ask team members to submit topics ahead of time for the agenda. Start and end on time.
- Avoid dead ends by coming prepared with possible solutions for any concerns or problems on the agenda. Solicit input from everyone at the meeting.
- Assign a note-taker to record key points, project assignments, and deadlines; distribute notes to everyone after the meeting.

PARTICIPATION

Do you ever have a problem getting everyone involved and speaking up in your veterinary team meetings? A successful meeting involves input from all your team members, since each of them can provide unique perspectives and ideas. Creating a culture of safe and judgement-free listening will help in promoting participation. It is important to avoid closing out team members who fear being judged by those with different views. When choosing the location of your meeting, make sure it is a quiet and relaxed area, free from interruption. Often, new locations (conference rooms in hotels, restaurant private rooms, civic clubs) can help spark creativity and breakthrough. To make your employees feel more like a team and fulfilled, delegate authority and leadership roles for the meeting to them. This reversal of the normal hierarchy can enable you to create a shared vision and goals for the team and strengthen the ownership that your staff will feel towards the practice.

TRY THIS:

- Delegate responsibilities (inventory, new technologies, social media, holiday parties) to team members, and allow time for members to update the group on what they’ve been working on and accomplished. Let a different member lead the meeting each time.
- Provide food to create a relaxed and satisfied environment. Rotate staff members in charge of food each meeting.
- Ask team members to prepare questions ahead of time for a specific topic. Assign an order at the beginning of the meeting for each person to talk. Since new or junior people are unlikely to offer comments that contrast with someone more senior, solicit their ideas first.
- Be open and ready to share the details of the practice, such as finances and production.
REWARDS

Both extrinsic and intrinsic rewards can be used to celebrate and encourage accomplishments. However, extrinsic awards, like bonuses and benefits, can fail to elicit enduring commitments or passion from team members. Intrinsic rewards can be used during your meeting to create a stronger and more inspired team. Examples of intrinsic rewards include things like celebrating individual accomplishments, the experience of feeling empowered from delegation of meaningful tasks, or competence built from attending continuing education events.

TRY THIS:

• Celebrate team and individual accomplishments with parties and recognition (plaques, certificates).
• Encourage team members to brainstorm possible solutions for current problems or challenges.
• Ask staff members to present what they learned at continuing education events.
• End every meeting with team members sharing a story about successful patient or client experiences.

References


Preparing For Your Veterinary Team Meeting

IDENTIFY THE PURPOSE OF THE MEETING

Whether a monthly practice team meeting or a project meeting for a veterinary research team, identify the purpose of the meeting. Do you need to make a decision, solve a problem, rally the troops, or inform your team about a new initiative? Clarifying the purpose(s) of your meeting is the first and most important planning step—this will drive all of the other elements of your preparation.

DEVELOP A PRELIMINARY AGENDA

- Ask for input from your team. You could ask for items at the end of the previous meeting, set up a suggestion box for team members to drop off suggested topics between meetings, or talk directly with team members.
- Lay out a sequence for the meeting. Plan time at the beginning for a brief introduction to provide context, and at the end for a discussion of next steps. Decide how much time to devote to each item and what order makes sense. It’s often wise to underestimate how much your group can cover in the allotted time.

ASSIGN ROLES TO PARTICIPANTS

Giving team members a specific role to play can increase their focus and engagement. Consider the following roles for some or all of your meetings:

- A coordinator sends out meeting announcements and meeting reminders.
- A facilitator guides the discussion, making sure all sides of the issue are raised.
- A scribe captures key ideas and decisions, and distributes notes (this can also give shy people a way to participate.)
- A timekeeper helps move the discussion along efficiently.
- Alternating participants’ roles for regularly-scheduled meetings can be a good way to engage team members and provide some responsibility.

DECIDE WHERE AND WHEN TO HOLD THE MEETING AND CONFIRM AVAILABILITY OF THE SPACE

- The meeting space helps to set the tone. Do you want your meeting to be informal and intimate? Choose a small room and quiet space (for example, the break room or a board room), and set the chairs up in a circle. Are you limited for space and need to hold the meeting in a working area? Think about ways that you can arrange the space to enable everyone to feel comfortable participating.
- To schedule meetings, it is best to establish a regular schedule so everyone can anticipate and be prepared for the next meetings. If there is no single day during the week that everyone is on site, you can pick two days and times of the week when your practice is less busy, and then alternate between these meeting days so everyone has a chance to attend. Plan to block 1.5 hours for your meeting. Even if you do not need all of that time, it will allow you quality meeting time in case surgeries or appointments run over time.

SEND THE INVITATION AND PRELIMINARY AGENDA TO PARTICIPANTS

- Send any reports, pre-reading, or requests for materials that may require preparation from participants.
- Send out any pre-reading a day or two in advance of your meeting and make it clear that participants are expected to review materials before they arrive. Alternatively, plan quiet reading time at the beginning of the meeting. Also, be prepared to highlight key takeaways from the reading for those who haven’t had time to comply.

CPR for Team Meetings | AVMA
FOLLOW UP WITH INVITEES IN PERSON, IF APPROPRIATE

- Check in with people who haven’t responded to your invitation or who need to be in the room to have a productive meeting. If you’ve assigned roles, verify that attendees understand the parts they will play.

FINALIZE THE AGENDA AND DISTRIBUTE IT TO ALL PARTICIPANTS

- If the agenda has changed, distribute the final version to team members. Make sure you’re ready to lead the discussion for each agenda item or that you’ve assigned items to appropriate team members.

PREPARE YOURSELF

- Have you taken a moment to make sure you are prepared to discuss all the items on the agenda? Doing the work to prepare will boost your confidence and set you up for a successful meeting.

Adapted from Harvard Business Review

Meeting Preparation Checklist

HAVE YOU...?

☐ Identified the purpose of the meeting
☐ Developed a preliminary agenda
☐ Assigned roles to participants
☐ Decided when and where to hold the meeting
☐ Sent out an invitation and preliminary agenda
☐ Verified that essential participants will attend
☐ Sent out the pre-meeting materials for review
☐ Sent out a finalized agenda
☐ Prepared yourself
### (Your Practice Name) Meeting Agenda

<table>
<thead>
<tr>
<th>Topic</th>
<th>Presenter</th>
<th>Time Allocated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statement of goals and guidelines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Celebrations, Anniversaries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housekeeping Items</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review from prior meeting <em>(previous decisions, problems implementing, unresolved issues, status reports)</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Continuing Education Topics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Business <em>(problems/concerns, new medical and office topics, upcoming events)</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spotlight successes and rewards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Topics for next meeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjourn</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Observers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special notes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Post-Op Care For Your Veterinary Team Meeting

OVERVIEW
Meetings are the lifeblood of any effective veterinary team. Different veterinary teams may require a range of types of meetings, but holding meetings with a group, over the phone, on video-conferencing, or while out on a walk are fundamental to share information, collaborate on ideas, and create personal connections. For the best meetings to be effective, recording the ideas, outcomes, and action items for future review are essential.

“The palest ink is better than the best memory.” ~Chinese proverb

RECORDING THE MINUTES
Whether the whole practice or production team is meeting or just a small group, meeting minutes help refresh the memories of those in attendance, and also serve as a guideline to help those not present. The goal is to “quickly send out clear and concise meeting notes and follow up on the commitments made.” (1)

MEETING MINUTES OR NOTES CAN TAKE SEVERAL FORMS DEPENDING ON THE LEVEL OF THE MEETING.

• Word for word transcript
  – Ideal for meetings that may have legal implications

• Full meeting minutes with notes on every point discussed
  – Ideal for executive meetings, practice management meetings, any meeting where changes to policy or guidelines are being discussed

• One to two pages with essential discussion and action items
  – Ideal for most employee meetings, rounds, and production meetings

• An email with bullet points
  – Ideal for small or informal meetings to create a record of the discussion

MEETING FOLLOW-UP
The meeting leader should plan on distributing minutes in a timely manner (within 24 hours is optimal), archive all meeting documents, and plan to check on all actions decided in the meeting (2).

A GUIDELINE FOR EFFECTIVE MEETING FOLLOW-UP (1):

• The meeting minutes should focus on the highlights of the meeting. Focus on the important topics.

• Team members often have different preferences for level of detail in the notes. Depending on the meeting, it may be helpful to have a general document as well as a detailed document for archiving.

• At the end of each topic in a meeting, pause to agree on next steps. Establish specific commitments with clear deadlines.

• It’s often automatic to say “by the next meeting” as the due date, but this is rarely optimal. Be thoughtful about what timing makes the most sense.

• At the time people are discussing commitments, be sure to let people know they can re-negotiate those commitments, especially with regard to due dates.

• Make it clear that you expect each commitment will be fulfilled as agreed upon. Be sure to state that if something comes up, you expect they’ll reach out to discuss a change.

• Assign someone to check in at appropriate intervals to ensure the commitments will be kept as promised or re-evaluated if something unexpected has arisen.

SUMMARY
Meetings are essential to sharing information to keeping your veterinary team well-informed and collaborating. The best way to ensure your excellent meetings are successful is to document them with notes and action plans that all necessary employees can access. Managing the follow-up to each meeting will make your next meeting even more productive.

References
2. What to do after a meeting - https://www.ohrd.wisc.edu/