

- CLARIFYING ROLES -

To achieve the outcome that you want your team to achieve, you need to be specific with regards to what activities are required of their role.

Create a crystal-clear picture of what successfully working with you looks like.

THE REALITY CHECK

Before you can create a picture of what your team roles and your expectations of those roles are, first get clear on what is currently happening that needs to change in order for you to achieve your business and lifestyle goals.

NOT WORKING/FRUSTRATIONS

What is currently happening in your business with your team that is frustrating you/slowing you down or simply not meeting the standards that you expect of your team in the following areas:

→ CLINICAL

(e.g not following, or meeting signature system guidelines expected)

Not block booking

Not achieving patient re-booking numbers required etc

→ ADMINISTRATIVE

e.g Not completing paper work

Not communicating with referrers etc

Debt accruing

Missing leads on the phone

➔ **HEALTHCARE LEADERSHIP**

e.g not creating referral opportunities or winning referrals from patients and referrers

Not winning re-activations from previous raving fan patients.

HOLD UP THE MIRROR

Now that you know what you don't want to happen, hold up the mirror and create an outline of what you want your team roles and expectations to be:

E.g If the current problem clinically is **not following or meeting signature system guidelines expected** then the mirror of that is: **To successfully recommend and achieve complete booking of our signature system guidelines**

➔ **WHAT DOES THE CLINICAL MIRROR LOOK LIKE?**

➔ **WHAT DOES THE ADMIN MIRROR LOOK LIKE?**

➔ **WHAT DOES THE HEALTHCARE LEADERSHIP MIRROR LOOK LIKE?**

➔ **TITLE OF ROLE NUMBER 1**

(write the title of your role here)

e.g Practitioner type, CEO, Director, Manager, Administration etc

➔ **PURPOSE OF ROLE** (when this role is performed successfully what does that look like?)

e.g Title: Practitioner type

1. Successfully treat patients of XYZ clinic to the standards set out as per our signature system best practice requirements.
2. To represent XYZ clinic to the highest standards and commit to growing our brand
3. To be a leader in XYZ profession and positively influence the health outcomes of XYZ community

CREATE YOUR ROLE PURPOSE HERE:

1. _____

2. _____

3. _____

4. _____

5. _____

➔ TITLE OF ROLE NUMBER 2

(write the title of your role here)

e.g Practitioner type, CEO, Director, Manager, Administration etc

➔ PURPOSE OF ROLE (when this role is performed successfully what does that look like?)

CREATE YOUR ROLE PURPOSE HERE:

1. _____

2. _____

3. _____

4. _____

5. _____

➔ TITLE OF ROLE NUMBER 3

(write the title of your role here)

e.g Practitioner type, CEO, Director, Manager, Administration etc

➔ **PURPOSE OF ROLE** (when this role is performed successfully what does that look like?)

CREATE YOUR ROLE PURPOSE HERE:

1. _____
2. _____
3. _____
4. _____
5. _____

ROLE ACTIVITIES

To make each role successful, specific activities need to be performed at a specific frequency.

Complete the activity below to specify the actions and frequency required to successfully fulfil each role within your team.

ROLE NAME

LIST OF ACTIVITIES TO BE PERFORMED IN THIS ROLE

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

FREQUENCY OF ACTIVITY TO BE PERFORMED

→ DAILY

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→ WEEKLY

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→ FORTNIGHTLY

→ MONTHLY

→ **QUARTERLY**

→ **BIANNUALLY**

➔ ANNUALLY
