

How To Prepare for Your Physician Practice Retreat

1. Leadership must motivate

Be clear and specific about the purpose of the retreat so that members understand their participation and buy-in are critical both to long-term financial success and to their satisfaction.

2. Facilitation and Scheduling

Have an objective facilitator, if possible, who encourages wider participation and does not let the group fall into unproductive communication habits. The facilitator should know the business of physician practice and be experienced enough to make observations, keep the discussion on track, answer questions and draw out participation – without dominating discussions.

Schedule your retreat when physician availability will allow the retreat best to play out. The time of year isn't as important as taking the opportunity to make decisions and get them moving.

3. Pin Down the Most Important Issues

If you hire a professional to facilitate, he or she should learn about the practice by having phone discussions with key leaders and by reviewing materials such as meeting minutes and notes, internal memos, etc. That background enables him/her to create a questionnaire for other physician members to complete and return. The questionnaire might be a "SWOT" evaluation of the practice's **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats. Or, an experienced facilitator may have a specifically developed list of questions probing each physician's sense of the practice. These responses create a better base for structuring the meeting itself and developing an agenda with time limits for each major subject.

If a professional facilitator is not hired, these tasks must fall to one of the leadership team. They cannot be delegated to less experienced administrative personnel because of the content needed to make the retreat truly effective.

4. During the session

Following the agenda, it is critically important to pull from the doctors their ideas and concerns. Use flip chart pages to note doctors' good ideas for each topic. Photograph them to include in a summary report. These visual reminders of the sessions spark fuller recollection of detailed discussions. At the end of the retreat, there should be reasonable consensus on goals.

5. Task list and timeline

The session won't accomplish much unless it leads to the development of an agreed-upon list of "action steps" – a list of tasks to accomplish for each goal and a timeline. It should designate a responsible party for each task so the goals are accomplished. A planning effort isn't worth much if it doesn't result in results.

Put all decisions and agreed actions into a summary that easily reminds all participants what the retreat accomplished and to guide them in following up. When group members are invested in the outcome of actions steps -- and leadership provides motivational follow-up -- a group retreat produces positive, practical group results.