Team Meetings

Strengthen Relationships and Increase Productivity

Developed in partnership with

Christine A. Sinsky, MD, MACP
Vice President, Professional Satisfaction, American Medical Association

How Will This Module Help Me?

Learning Objectives

1. Describe key roles involved in effective team meetings
2. Recognize the importance of setting ground rules and a consistent meeting agenda
3. Identify when team meetings are an effective method to accomplishing a goal
4. Define habits that lead to productive team meetings
Introduction

What Is a Team Meeting?
Team meetings bring all members of the practice, such as the physician, nurse, medical assistant (MA), and office team members together to analyze the way work is currently being done and take steps to improve efficiency. Because all team members should be involved, you may have to send calls to voicemail during this time. In effective team meetings, each team member is encouraged to share ideas to improve the practice’s workflow.

Ideas arising from team meetings vary in scope and scale. For example, team meetings at Boston Medical Center identified patient “lanes” at the front desk area as a mechanism to address specific types of patient needs. This simple solution alleviated stress for patients and the front desk team. At Bellin Health System, a team meeting brought together the extended care team to develop a care plan for one patient with chronic health issues that served as a model for helping other patients with similar needs. These examples demonstrate why it is imperative to involve all members of the practice.

Video 1.
Watch how Brigham and Women's Conducts Team Meetings

Various patient care team members at Brigham and Women’s Advanced Primary Care Associates share ways their practice conducts effective team meetings to level-set regarding patient experiences and work processes, as well as the importance of praising staff members through shout-outs.

Ten STEPS for Effective Team Meetings

1. Identify the Team
2. Meet Regularly and “On-the-Clock”
3. Agree on Ground Rules
4. Set a Consistent Meeting Agenda
5. Rotate Meeting Roles
6. Solve Problems as a Group
7. Record Action Items, Individuals Responsible, and Due Dates
8. Practice Good Meeting Skills
9. Have Some Fun!
10. Celebrate Your Successes

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Identify the Team

The team's composition may vary based on the practice's size or care setting. In one practice, the team might include 2 physicians and their medical assistants, nurses, and the clinic manager. In another practice, the team may include 1 physician, 2 nurses, and a receptionist who also handles the billing. Smaller practices may invite the lab or X-ray technicians to team meetings. In larger practices, other relevant team members, such as social workers and pharmacists, may be included.

Q&A

Should we include all members of our department?

It depends on the agenda. Yes, if you have a small team and are focused on identifying and solving issues in real time. A team meeting with 4 to 12 people will be most productive. In a large department, it may be difficult for each team member to provide input and actively participate so meetings involving the whole department may be best reserved for communication of issues affecting the entire practice rather than problem solving.

Should we include administrative leaders, IT, or compliance personnel on the team?

Team meetings are problem-solving sessions. They are most effective when the standing team consists of the people directly doing the work and a manager who can connect with the larger organization. If the topic would benefit from an expert's contribution to the discussion, you can invite IT professionals, facilitators, or administrative leaders as needed.

Meet Regularly and “On-the-Clock”

Establish a regular meeting time and location. Meetings should be held away from the clinical area if they take place during patient care hours, and should be scheduled “on-the-clock”—time during which the practice team members are compensated, which may or may not be during regular clinic hours—to convey the message that
meetings are part of the team’s core workday. Many teams meet for one hour every 2 weeks. You may find that meeting first thing in the morning results in fewer distractions.

“Our care team meetings, where we talk about patient experience, health outcomes, and time spent on specific tasks, make the practice a more enjoyable place to work and has ultimately helped us recruit and retain staff.”

—Beth Averbeck, MD, HealthPartners Medical Group, Minneapolis, MN

**Q&A**

How can we meet when the phones keep ringing?

Some practices meet before the clinic opens but “on-the-clock”, whereas others send calls to voicemail during the meeting. Another option is to assign someone from another team to handle the phones, so team members are not distracted. Each of these actions demonstrates the importance of team meetings to your practice.

We just instituted huddles before clinic sessions. How are team meetings different?

**Daily huddles** are usually 5- to 10-minute discussions that serve to ensure team members are on the same page about the particular needs of the day. Issues identified in daily huddles that need further review can be added to the “parking lot” and discussed in further detail at the next team meeting, which typically occurs on a weekly or bi-weekly basis. Team meetings are also an opportunity to improve workflows and strengthen team culture.

**Agree on Ground Rules**

To form a supportive and respectful environment for your team meeting, establish ground rules from the beginning. As a team, create your own set of ground rules to create buy-in on team meetings and **strengthen teamwork**. Signing a charter or statement of purpose can help the team connect with the ground rules and their commitment to the group.

Some suggestions for ground rules are listed below:

1. **Start on time, end on time**: Come to the meeting on time and ready to work. End on time so team members grow to trust their time commitments.
2. **Be present**: Leave devices behind if possible. Those on call for patient care are exempted. Don’t check your phone or your laptop during the meeting unless doing so adds to the topic at hand.
3. **Stay on topic:** If the discussion wanders, the meeting chair or another team member can say, “Let’s take that offline,” or “That sounds like an issue to put in the ‘parking lot’ to talk about at another meeting.”

4. **Focus on the issue, not the individual:** The goal is to work together to improve the work, not to blame or incriminate individual people.

5. **Step up or step back:** Speak up if you’ve been quiet in the meeting; step back and let others speak if you’ve been speaking often. During their turn as meeting chair, team members may need some practice in drawing out quiet members. To encourage participation, you may say, “We haven’t heard from everyone—Samuel, what do you think?” Another technique is for the chair to announce that the team will hear from everyone going in a clockwise direction, ensuring that all members are heard in an orderly process.

6. **Give thanks:** Thank each other for contributing during the meeting and afterward.

**Team Meeting Ground Rules**

Use the ground rules outlined in this document for your practice’s team meetings.

(QMS WORD, 41 KB)

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**Q&A**

What do we do when a senior leader breaks a ground rule, for example, by jumping to the “fix” rather than allowing all team members to weigh in?

It can be challenging to ask a senior leader to step back and allow others to share their points of view. If another team member politely reminds a senior leader of the ground rules and the senior leader can respond with a friendly smile and say, “You’re right, thanks,” this can maintain the collaborative culture during the meeting.

We want every team member to participate, but some individuals can be reluctant to speak up. How can we encourage everyone to feel comfortable enough to contribute their thoughts during team meetings?

Be patient. It takes time for people to trust a new process and become comfortable sharing their views in front of colleagues who may be senior to them. It is important that everyone has an opportunity to contribute and that one or two people don’t dominate the discussion. If some people haven’t shared their thoughts, the chair can draw them out by saying, “We haven’t heard from Amy or John, and we’d like to hear each of your thoughts.” As you continue to hold team meetings, you may find that shyer people become more comfortable and begin to speak up voluntarily. Alternating between clockwise and counterclockwise rotation expecting all to provide input helps to eliminate the need for the chair to keep a list of who went first and to avoid unstructured shouting matches.
Set a Consistent Meeting Agenda

Many teams use an agenda template to set a consistent agenda for each meeting.

Common standing items (described in the Q&A that follows) include:

- Check-in
- Shout-out
- Check-back
- New business
- Education
- Debrief

Post the meeting agenda ahead of time, either online or on a bulletin board. Allow all team members to write in or submit agenda items. Next to each agenda item, write the name of the person responsible for leading the discussion and the approximate time allotted. Assigning a time for each item will help the meeting stay on schedule. If there are many items on the agenda, you may wish to prioritize them at the beginning of the meeting.

Sample Meeting Agenda

Use this sample meeting agenda to create agendas or an agenda template for your team meetings.

(Q&A)

What is a check-in, and what is its purpose in a team meeting?

The check-in is a one- to two-minute opportunity for each team member to share something about his or her personal life. These few minutes can help establish a sense of community and allow people to set aside their worries. For example, a team member might share, “My roof is leaking; I've been calling around all morning,” or, “My child stayed home sick today, so I'm a little distracted.” The check-in can also be a time...
for people to share positive events that may improve team building: “I found out my sister is going to have a baby!” Participation in the check-in is optional.

**What is a shout-out, and what is its purpose in a team meeting?**

More formally known as “appreciative observation,” a shout-out is a time where team members can share something that went well since they last met. A shout-out may include successful implementation of a new process or improvements in a particular patient’s care. Stories that involve multiple team members are particularly meaningful. Such stories are powerful tools for team engagement and building team culture. Knowing that this time will always be part of the meeting agenda encourages team members to keep track of and report on successes.

**What is a check-back?**

A check-back is the opportunity to revisit previous agenda items or give updates on projects that were developed to solve problems discussed in previous team meetings.

**What do we do when there are too many items on the agenda?**

It helps to spend one to two minutes at the beginning of the meeting setting priorities. The chair might say, “We have six new items on the agenda; what is your priority?” If time runs out, lower priority items can be moved to the next team meeting agenda. Assigning time limits—and sticking to them—can help the team efficiently move through a busy agenda.

When an agenda item requires in-depth discussion, the chair can organize a team of volunteers to discuss the topic outside of the team meeting. Doing so recognizes that the issue is beyond the present meeting’s scope but is important to the team to resolve.

**What is a debrief, and what is its purpose in a team meeting?**

The debrief is a chance to assess the meeting’s effectiveness in real time. The debrief focuses on promoting and encouraging the positive elements of the meeting with immediate feedback. At the close of the meeting, the chair may choose to ask, “Was there a portion of the meeting that was particularly meaningful or useful to you?” This approach promotes continuous process improvement.

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### Rotate Meeting Roles

Assign a different team member to the roles of chair, timekeeper, and recorder for each meeting. During one meeting, the receptionist might fill the role of meeting chair, while the nurse manager records the minutes as recorder. At another meeting, the medical assistant might lead the meeting, while the physician records the minutes. This approach can help build team culture, promote collaboration, and develop leadership skills.

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### Q&A

**What does each role do in a team meeting?**

The chair helps organize the meeting and keeps the discussion on track by following the agenda as the meeting progresses. The timekeeper ensures that the discussion follows the allotted time per item, so all agenda items are covered. The recorder takes notes and creates the minutes, capturing decisions, action items, and the individual(s) responsible for each task.
The physicians are the owners and leaders in our practice. Can rotating the chair of the meeting work in our organization?

Absolutely. While the physicians or other leaders will ultimately make the major financial and operational decisions, there are many issues at the practice level best worked out as a team. It takes time to break down the hierarchy in a practice and establish a level of comfort in speaking up. In the most effective team meetings, individuals “check their titles at the door” to allow each team member to make contributions. In a situation such as this, you should help team members understand that their roles are essential to the team’s and the practice’s success. This approach can help build team culture and confidence. Leaders who develop leaders can assure the success of the organization.1

What if some team members do not want to rotate in and run the meeting as chair?

Some team members may not initially be comfortable with the leadership role of meeting chair, and it is worth investing time in their development. Managers can explain, “It’s okay if you need help. Taking a turn as meeting chair is something that we all do as part of our jobs. We will mentor you in this rotating leadership role and are committed to your success.” Help them prepare by beginning mentorship right away and distributing the calendar with meeting dates and team member roles well before the meeting.

How do we keep team meetings on track and focused?

One of the chair’s responsibilities is to watch for wandering discussions and steer the group back to the topic at hand by asking, “Should we be discussing this right now? Should the subject be taken offline from here?”, or suggesting, “That sounds like an issue to put in the ‘parking lot’ and talk about at another time. Let’s make sure it’s on the agenda for our next meeting.” Be sure to address any deferred topics at future meetings to build team trust and reinforce to the team that everyone’s input is valuable.

When an item requires in-depth discussion, the chair can organize a team of volunteers to discuss the topic outside of the team meeting. By doing so, the team recognizes that the issue is beyond the present meeting’s scope but is important to the team to resolve.
Solve Problems as a Group

Team meetings are a time for everyone to engage in problem-solving to make their collective work better, not a time for leadership to communicate new policies and procedures to the team. Updating team members on practice- or system-wide information may be better suited for the larger departmental team meeting.

Topics to discuss as a group include the “nuts and bolts” of running a practice. Consider brainstorming ways of optimizing workflows for the following tasks:

- Common clinical scenarios
- Pre-appointment questionnaire workflows
- Updating patients' medications lists
- Assigning roles and responsibilities for administering specific immunizations
- Housekeeping responsibilities
- Patient flow for procedures
- Post-care follow-up

Q&A

How can we analyze our workflows to yield better efficiency?

Many clinics find that Lean tools can help solve common clinic problems and contribute to overall process improvement.

What do we gain by meeting separately when we work together all day long?

It is much easier to improve your workflows if you can step back and analyze while you are not in the midst of a busy workday. In addition, having a dedicated meeting time gives every team member the opportunity to share their ideas.

We're on a tight budget and shutting down the office for an hour to hold a team meeting represents a significant loss of income with no reduction in overhead. How do we address this?

Team meetings should introduce efficiencies in your practice that will more than cover the lost revenue in the long run. Team meetings can also help improve team morale, which improves retention and productivity. Seeing one more patient a day by reducing time spent on medication refill phone calls or room turnover delay means seeing 10 additional patients over 2 weeks. This should make up for the one-hour investment in your personnel and practice efficiency. If you want to keep the same number of clinic hours during a week when you have a team meeting, you can consider paying your team overtime for meeting outside of regular hours.

We rarely get around to talking about problems as a group because we have so many management updates to cover. What should we do?

Team meetings are not for management updates. Create other forums, such as general department meetings, or use online communication for such updates. Make sure leadership is aware of team meetings’ purpose, which is to solve problems that impact the day-to-day activities of the practice. They are also a forum for all team members to voice their challenges and suggest solutions.
Record Action Items, Responsible Individuals, and Due Dates

Make sure that someone is recording minutes during each meeting on a standard form. Before concluding each meeting, identify action items, the individuals responsible for them, and their due dates. After the meeting post the minutes online or in an accessible place so team members can reference them in the future. At the next meeting, use the check-back to report each action item's status and continue to monitor progress.

Meeting Minutes Template
Use this sample meeting minutes document as a template to create your own meeting minutes to outline the discussions from your team meetings.
(MS WORD, 47 KB)

Practice Good Meeting Skills

Good habits make meetings more productive. Some examples of good meeting habits include:

- Staying on task
- Focusing lengthy discussions by identifying important, but off-topic, items as “parking lot” issues to get back to later during the meeting or to address at another time
- Avoiding side conversations
- Making a point to respond constructively rather than negatively
- Maintaining respect and understanding for others' points of view
- Encouraging equal participation so that no one dominates the discussion

Occasionally, meetings may go astray despite your best efforts to keep them on track even when applying all of the good meeting skills outlined above. This may be the result of an individual who is negative, argumentative, or disrespectful of other team members. In those situations, you may find that a “praise in public, coach in private” approach can help address negative feedback or interactions, disrespect, or other issues encountered during the meeting. The following video is an example of how to coach in a constructive way.

Video 2.
Coaching in the Moment

TeamSTEPPS® is an evidence-based set of teamwork tools, aimed at optimizing patient outcomes by improving communication and teamwork skills among health care professionals. TeamSTEPPS® is a product of the Agency for Healthcare Research and Quality (AHRQ); it is not affiliated with the AMA's AMA STEPS Forward™ practice improvement strategies.

Q&A

Some of our team members find change difficult, even if the changes will save them time or enable them to be more effective. They seem to raise objections to every new idea. How can we keep team meetings constructive in this situation?

One helpful adage to keep in mind is, “If you oppose, you must propose;” that is, if you are opposed to one solution, contribute to the conversation in positive way by proposing an alternative solution. The meeting chair can help promote this approach by responding to an objection with, “What do you think is an alternative idea we should consider?”
One of our team members is very negative and debates many proposed changes that others suggest. This team member’s attitude impacts how vocal others are on the issues in discussion, effectively shutting down engagement and enthusiasm. How should we handle this?

Many people resist change. Others feel overwhelmed and can’t imagine doing things differently, so it can be helpful to say, “The goal of our team meetings is to address challenges that will make our work easier. Let’s pilot the solution the group proposed a few months ago and then assess what worked well and what we could do to improve the process further. Your constructive feedback will help us get better.” Helping all team members feel valued amid change will make them more likely to become positively involved.

For an extreme situation, bringing in an outside facilitator for a few meetings to lead a healthy team dynamics workshop can help. Occasionally, it may be necessary to recognize that the new work model is not a good fit for a particular team member. Try to coach the team member, and if that does not have positive results, then corrective action may be the next step.

9 Have Some Fun!

It is important to have fun at team meetings. Promoting the team's shared purpose, respect, and friendship improves team culture and employee engagement. A bit of fun (e.g., role-playing, games, or team-building exercises) can translate into significant improvements in reaching the group's mission.

Q&A

Do you have any suggestions for fun activities to promote team cohesion?

One leader reports that he often opens meetings with an icebreaker or team-building exercise, such as having each attendee:

- Tell the team something about their name, such as its meaning or origin
- Share two truths and one lie about themselves; teammates guess which one is the lie
- Tell the person to their left something that they appreciate about that individual

Dedicate time at the beginning of a meeting to create a logo or motto for the team that captures the team's mission and purpose.

10 Celebrate Your Successes

Keep a running list of the team's accomplishments and periodically refer to it. Share stories about particularly meaningful patient interactions. Tell stories about inspiring patient encounters.
“During a team meeting, the physicians told one of our LPNs how much her pre-visit planning work helps them during patient visits. She realized how important the pre-visit planning process was to her team, and she quickly became the top performer.”

—Katie Holley, MHA, System Business Development and Planning Consultant, Fairview Health Services, Minneapolis, MN

Conclusion

Team meetings can help your practice efficiently and effectively solve problems, develop stronger bonds between team members, and provide better patient care. The strategies and tactics presented in this module will support your efforts to implement and conduct successful team meetings.

Further Reading

Journal Articles and Other Publications

  
  While this workbook focuses on long-term care, it offers several worksheets you may find useful for implementing team meetings in your practice, including a Meeting Notes template (p. 8), sample Staff Satisfaction Survey and Skills Assessment worksheet (pp. 18–20), and a practice improvement initiatives chart (p. 38). * Chase SM, Nutting PA, Crabtree BF. How to solve problems in your practice with a new meeting approach. *Fam Pract Manag.* 2010;17(2):31-34. https://www.aafp.org/fpm/2010/0300/p31.html


**Videos and Webinars**


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**Credit Renewal Dates:** February 22, 2016, May 23, 2019, May 20, 2021

**References:**

1. Maxwell JC. *5 Levels of leadership: proven steps to maximize your potential*. Center Street; 2011.