



It is part of our culture at HG that each practice team take part in a weekly / monthly and quarterly team huddle.

Based on best practise, this will result in improved communication, transparency, consistency and ultimately performance at all levels. The nominated person will report back to each team member on a weekly basis in the suggested format.

For the teams who already do this consistently, we have seen improvement in engagement levels. We want to encourage all team members to give all of their best each day, committed to our values, our culture and motivated to contribute to our success. This level of communication also generates an enhanced sense of own well-being and happiness in the working environment and will aid personal development.

At the end of each month & quarter, the monthly / quarterly review will take place as part of the weekly team huddle. This will include a full review of all team objectives and performance.

We would like to share some best practice and top tips with our practices on how to deliver a brilliant huddle. Part of this will also look at the common questions being raised by team members and how you can best answer them.

## Week 5

### Turnover target

This is taken from the weekly target, set in your workbooks (example, £5000).

You can find this on the sheet 'Monthly Actuals' (red), towards the top and on the left, in the green highlighted box.

### Turnover performance

This is taken from the previous weeks sales (example, £4800).

You can find this on the sheet 'Daily KPI Input Sheet 2014'(green), add the 'Total Sales' column (last one) from Monday to Saturday for the relevant week.

### Comments

Make a comment on whether the target was met or not and give this some perspective by mentioning some examples like how many dispenses you missed out by, quality of handovers, making the most of every patient that is seen, etc. This will allow your team members to have some focus for the week.

### Action

Mention to the team what they can do to improve the sales figure and quality of their service.

For example, focus on the second pair sunglasses offer, always offer the best, better and good option when choosing lenses, always ask the patient if they would like an 'MOT' on their spectacles, etc.

## MTD

### Turnover target

This is taken from the monthly target, set in your workbooks (eg. £25,000)

You can find this on the sheet 'Monthly Actuals 2014'(red), towards the top and on the right, under the column 'Monthly Target'.

### Turnover performance

This is taken from the current monthly sales (eg. £26,437)

You can find this on the sheet 'Weekly and Monthly KPI 2014'(red), in the relevant monthly row and under the 'Total Sales' column at the end of the row.

### Audiology performance (participating practices)

3 Key performance indicators should be reviewed;

- Hearing Screenings Booked/Attended
- Full Hearing Assessments Booked/Attended
- Total Sale Made MTD

The Audiology partner will set the targets for the KPIs and should either attend the Huddle or dial in a minimum of once every two weeks. In addition, the Audiology partner will provide the audiology data for all huddles.

### Comments

Mention how the practice is tracking for the month and against the target. Make reference to what this means for everyone, i.e. bonus, getting ahead, gaining back any previous deficits, etc.

### Action

Mention to the team what they need to do to keep on track. For example, ensure adequate cover, maximise dispensing, etc.

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## Practice Efficiencies

Take this opportunity to inform your teams on the state of the diary, can it be more efficient. Also, you can discuss the Gross Margin and how you are tracking to the target set in the forecast for this KPI.

You can find this on the sheet 'Monthly Actuals'(red), in the row '% to sales', under the column 'Monthly Target'.

### Comments

Discuss and mention reasons behind these key figures and educate your team members with examples of what affects these KPI's, for example patients not turning up, un-booked appointments in the diary, purchase of stock, utility bills, etc. Again, make the points directly relevant to your team members so they can grasp the importance of these figures, for example make the connection that the better the figures the more money will be in the pot for bonus and for any other financial help the practice or teams may require.

### Action

How are you going to take the points raised above and make changes to improve efficiencies, for example, make phone calls to patients before the clinic day to remind them of their appointment, sell through current stock and reduce purchase of additional stock, make sure computers and lights are switched off when not required, etc.

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## Social Networking Activity Update

This is the perfect opportunity to discuss the Weekly Postcard and bring everyone up to speed with what the practice has achieved for their online presence and how this compares to rest of the practices in the group.

### Comments

Mention the practices activity for the previous week, what worked well, where can it be improved, who will take responsibility for which platform and most importantly answer any questions that any of the team members may have regarding social media.

### Action

Based on the above discussion, what will be this weeks strategy. Ask the Social Hubmeisters for some more content or help, which can be used to push out on the social networks this week.

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## Quality & Customer Care Manual

This is a crucial point to discuss between you team members to make sure everyone is working at the same level of quality, in the same manner and passing information over to patients in the most efficient and effective manner.

### Comments

Use examples from the previous week to help learn from our mistakes or better understand what is working well in the practice. Were there any complaints, why did they occur, what did this affect and how can it be avoided next time. For example, "Mrs. Jones was unhappy with her order and a subsequent £500 refund was made to her last week because she felt that she had been kept in the dark about why her glasses were delayed.

To avoid this next time can we ensure that all team members are communicating to the patients as early as possible about potential delays and expected timescales and can we also try to eliminate any recurrent issues that are causing the delays and report back on any patterns that need addressing".

### Action

Which part of the Customer Care manual can the team refer to avoid these problems in the future?

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## Operational Excellence

### Comments

- Share the latest health index report with all team members.
- Celebrate areas of improvement and discuss areas which require attention.

### Action

- Is the stock take planned for the month, review debt levels and sight test performance?
  - Is the practice on track to achieve their schedule of health checks and inspections?
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## Top Tips

- Have your huddle early in the week so you can implement changes sooner rather than later.
- Always make reference to what the point means for the team member and how this directly affects them.
- Discuss what is working better elsewhere which you may have heard about and that you may implement in your practice.
- Ask your team members to make at least one suggestion of improvement and how you will track this the following week to see how it worked out.
- Always ask your team members to go to the huddle project after it has been posted and reply back to the message with a reply that they have read it.
- **Huddle every week** even if there is one person in the huddle, the importance of this cannot be stressed enough! Huddle yourself if you have to!

The weekly huddle forms part of the HG Business Scheme. This will result in improved communication, transparency, quality, consistency and ultimately performance at all levels. The FISH will report back to each team member at the weekly team huddle in the suggested format:

- 1 Previous weeks turnover against weekly target.
- 2 MTD turnover performance against MTD target.
- 3 Costs within the business that team members can help manage / control.
- 4 Social networking activity update.
- 5 Ideas of how team members can engage social networks during the following week/month.
- 6 Cover off at least 1 area within the customer care manual to improve patient journey.
- 7 Clear measures and plan for the following week/month to keep each area improving.
- 8 Operational excellence update.
- 9 Any other practice issues that require attention.

At the end of each month and each quarter, the monthly / quarterly review will take place as part of the weekly team huddle and this will include a full review of objectives and performance. If the huddle is not consistently done, then the entire bonus pot may be cancelled.

## Example Calculation

Financial performance:

- For each quarterly financial KPI met, we will add £250 to the monthly bonus pot.
- Turnover target met = £250.
- Gross margin target met = £250.
- Ebitda target met = £250.

Total Financial Bonus pot = £750.

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## Quality Performance

- No critical fails on latest mystery shopper report and quality standards improved from previous quarter (this will be subjective and based on a combination of: mystery shopper report, patient feedback each quarter, discussion with practice team members / manager).
- Quality bonus achieved (as described above and decided by Hakim HQ).

Total Quality Bonus pot = £250.

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## Social Networking Performance

- Overall quarterly effort as graded by the SHARK and practice buddy.
- Up to a further £300 will be added to the pot depending on the effort within the practice.

Total Social bonus pot = £300, £200 or £100  
(based on effort).

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## Operational excellence performance

- All Health checks and inspections completed for the quarter and the Health Index score for the practice is not less than 75%. Separate review of non-Optix practices

Total Operational excellence pot = £250

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## Discretionary Bonus

- Plus an extra upto £500 against agreed criteria signed off by the SHARK and practice buddy.
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