

Chapter 3: Turning Numbers Into Action: Operations

From insight to operational excellence

Operations is where strategy meets reality. Brilliant financial plans collapse when no one maps the process that's supposed to execute them. This chapter is about seeing your system clearly, building standard work and daily huddles so the practice doesn't depend on any one person's memory, and running small, disciplined PDSA cycles until improvement becomes routine.

How to use these worksheets

Work through one chapter per session with your leadership team.

Know it is answered individually. Own it is answered together. Do it assigns an owner and a date.

Finish each chapter by filling the 90-day action plan, then review it at your weekly standup.

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CHAPTER 3

Turning Numbers Into Action: Operations

From insight to operational excellence

Operations is where strategy meets reality. Brilliant financial plans collapse when no one maps the process that's supposed to execute them. This chapter is about seeing your system clearly, building standard work and daily huddles so the practice doesn't depend on any one person's memory, and running small, disciplined PDSA cycles until improvement becomes routine.

Suggested session: 90 minutes with your leadership team

Operations is where strategy meets reality. Brilliant financial plans collapse when no one maps the process that was supposed to execute them. Every step a patient takes in your practice must be mapped and measured against the value it provides. If a step doesn't help the patient, it isn't helping the practice either.

From the Operator's Chair

The practices that win have the best systems for turning ideas into repeatable, reliable action. Standard work, daily huddles, and improvement cycles are the engine of independence, not bureaucracy.

Three worksheets, one operating system

Seeing the system through process mapping: find the bottlenecks and fix the worst one

Standard work and daily huddles: create repeatable processes and communication rhythms

Improvement cycles (PDSA): test, learn, and build improvements into standard work

How to run this session

Block 90 minutes. Read the Operator's Chair guidance aloud, answer KNOW IT individually and silently, discuss OWN IT as a group, assign DO IT actions with an owner and a date, then close with one takeaway and one commitment from each person.

Ground rules stay the same as every chapter: honesty over comfort, titles stay at the door, disagree then commit, no devices, what's said here stays here, and action over discussion. Every session ends with at least one assigned, time-bound action item.

WORKSHEET 3.1

Seeing the system through process mapping

Lesson: Identify Bottlenecks and Fix the Worst One

Purpose: Map one broken process from start to finish, identify waste, and design a simpler future state.

Participants: Leadership team plus the staff who actually do the work being mapped.

1 KNOW IT

Answer individually before the group mapping session.

1. Pick one process in your practice that frustrates you. Describe it in 2 to 3 sentences: Example: 'Patient check-in takes forever. Staff are constantly running back to ask patients for information we should already have.'

2. How many people touch this process from start to finish? List their roles:

3. Where do you think the process breaks down most often?

2 OWN IT

Map the process together. A whiteboard, sticky notes, or a big sheet of paper all work.

1. STEP 1: Pick one process to map. The process we're mapping is:

2. STEP 2: Map the current state. Walk through every step. Include every handoff, delay, and decision point. Map what actually happens, not what's supposed to happen. How many steps did we count?

3. STEP 3: Identify waste. Mark steps that don't add value, steps where work sits waiting, and steps where errors happen most often. The biggest sources of waste are:

4. STEP 4: Sketch the future state. What would this process look like if you removed the waste?

Role clarity: who owns what

Testing the future state process

Training staff on the new process

Auditing the process monthly

3 DO IT

This week and beyond. Turn this into action.

Weekly action

Test the future state process for one week. Track how long it takes, where it breaks, and what staff think of it.

Monthly check-in

Review the process map at the start of each monthly leadership meeting. Ask: 'Is this process still working? Have we slipped back into the old way?'

Posted visibility

Print the future state process map and post it at the workstation where the process happens. Laminate it if possible.

Who is responsible	When will this happen

WORKSHEET 3.2

Standard work & daily huddles

Lesson: Create Repeatable Processes and Communication Rhythms

Purpose: Document your most critical processes as standard work and design a daily huddle that actually works.

Participants: Leadership team, practice manager, and frontline staff who execute the processes.

From the Operator's Chair: I remember a scheduling coordinator who could run the entire front desk from memory. She was brilliant, and she was a single point of failure. When she took a two-week vacation, the practice nearly collapsed. Standard work isn't about removing people's judgment; it's about making sure the practice doesn't depend on any one person's memory. Document the process, post it at the workstation, and train everyone to the same standard. Then build a daily huddle, ten minutes, standing up, every morning before the first patient, to align the team on what matters today.

1 KNOW IT

Answer individually before the group discussion.

1. What's one process in your practice that produces different results depending on who does it?

2. Does your practice currently have a daily huddle or standup meeting?

- ☐ Yes, and it's effective
- ☐ Yes, but it's inconsistent or not useful
- ☐ No, we don't have one
- ☐ We have meetings, but they're too long to be called a huddle

3. If you had to document one process as 'standard work' this week, which one would have the biggest impact?

2 OWN IT

Design your standard work and huddle format as a team.

1. DISCUSSION PROMPT 1: Which 3 processes would benefit most from standard work documentation?

Process	Why It Needs Standard	Who Will Document It	Deadline
1.			
2.			
3.			

2. DISCUSSION PROMPT 2: Design your daily huddle. What should be covered? How long should it take? Who facilitates it?

Huddle Element	Content / Question	Time (mins)
Safety / Urgent Issues		2
Today's Schedule / Capacity		2
Yesterday's Wins		1
Today's Top Priority		2
Blockers / Help Needed		2
Total		~10 min

3 DO IT

This week and beyond. Turn this into action.

Action 1: Document your first standard work process

- ☐ Choose the most variable or error-prone process
- ☐ Walk through it step by step with the staff who do it
- ☐ Write it down in plain language
- ☐ Post it at the workstation where the process happens

Owner	Deadline

Action 2: Launch your daily huddle

- ☐ Choose a consistent time (ideally before the first patient)
- ☐ Keep it to 10 minutes maximum
- ☐ Assign a rotating facilitator
- ☐ Start tomorrow, don't wait for it to be perfect

Owner	Deadline

Who is responsible	When will this happen

WORKSHEET 3.3

Improvement cycles (PDSA)

Lesson: Test, Learn, and Build Improvements Into Standard Work
Purpose: Use the Plan-Do-Study-Act (PDSA) cycle to test one improvement this month.
Participants: Leadership team, practice manager, and the staff responsible for the process being improved.

From the Operator's Chair: Improvement isn't about launching massive initiatives. It's about running small, disciplined experiments. The PDSA cycle is the engine: Plan what you'll test, Do it on a small scale, Study whether it worked, then Act, either adopt it as standard or try something different. The practices that improve fastest are the ones that run one PDSA cycle per month, every month, without fail. It builds a culture where "we tried something and it didn't work" is celebrated, not punished.

1 KNOW IT

Answer individually before the group discussion.

1. What's one improvement you've been meaning to make for months but haven't started?

2. Why hasn't it happened yet? (Be honest.)

- ☐ We don't have time
- ☐ We're not sure how to do it
- ☐ We've tried before and it didn't stick
- ☐ Nobody owns it
- ☐ Other

3. What's the smallest possible test of that improvement you could run in the next two weeks?

2 OWN IT

Design your PDSA cycle as a team.

PDSA Step	Your Plan
PLAN, What are we testing? What do we predict will happen?	

PDSA Step	Your Plan
DO , What exactly will we do? Who will do it? When?	
STUDY , How will we measure whether it worked? What data will we collect?	
ACT , If it works: How do we make it standard? If it doesn't: What do we try next?	

3 DO IT

This week and beyond. Turn this into action.

Action 1: Run your first PDSA cycle this month

- ☐ Choose one improvement to test
- ☐ Run the test for one to two weeks
- ☐ Collect data on whether it worked
- ☐ Present results at the next leadership meeting

Owner	Deadline

Action 2: Build a monthly improvement rhythm

- ☐ Schedule one PDSA cycle per month
- ☐ Assign an owner to each cycle
- ☐ Post results where staff can see them
- ☐ Celebrate wins, even small ones

Owner	Deadline

Who is responsible	When will this happen

90-DAY ACTION PLAN | CHAPTER 3

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Consolidate every action item from this chapter into one tracking sheet. Review progress at each weekly standup.

#	Action item	Owner	Deadline	Status
1				
2				
3				
4				
5				
6				

Session date

90-day review date

Key insight from this chapter
