

## BUILDING YOUR MANAGEMENT TEAM - SELF ASSESSMENT WORKSHEET

***Remember this self assessment questionnaire should be completed by both practitioner AND practice/business manager!***

Practice name \_\_\_\_\_ Date \_\_\_\_\_

### INTRODUCTION

<b>I1</b>	Have you read the article "Practitioners vs Managers - Damaging Expectations!" by Lina Craven?	YES / NO
<b>I2</b>	Have you met with your practitioner / manager to discuss the article?	YES / NO

### GENERAL

<b>G1</b>	Does a practice vision exist? If NO go straight to G6 below	YES / NO
<b>G2</b>	Has the practitioner shared his/her practice vision with the manager?	YES / NO
<b>G3</b>	Is the practice vision clear and not too general?	YES / NO
<b>G4</b>	Has the practice vision ever been discussed in detail with the manager?	YES / NO
<b>G5</b>	Do <b>you</b> understand and believe in the vision?	YES / NO
<b>G6</b>	If your vision has never been discussed set a date now and write it in the box provided	DATE -
<b>G7</b>	Has the vision been shared with all staff? If YES go straight to G9	YES / NO
<b>G8</b>	Please book a date in the appointment diary of at least 1 hour to share the vision with all staff and record it here	DATE -
<b>G9</b>	Is there a detailed job description for the practice/business manager?	YES / NO
<b>G10</b>	Is there an up to date job description specific to the manager's role at your practice? (ie not a generic job description)	YES / NO
<b>G11</b>	When was the last time the practitioner and manager discussed the job description? Write the date here	DATE -
<b>G12</b>	Have you ever used <a href="http://www.bdpma.org.uk">www.bdpma.org.uk</a> to compile the manager's job description and competences?	YES / NO
<b>G13</b>	Do you use your detailed job description to identify training and development needs?	YES / NO
<b>G14</b>	Do you create SMART objectives for each training/development needed identified in G13 above?	YES / NO

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### MANAGER'S WORK ENVIRONMENT

<b>W1</b>	Does the manager have his/her own work space?	YES / NO
<b>W2</b>	Is it clean and tidy at all times?	YES / NO
<b>W3</b>	Is it fit for purpose with all the necessary equipment and privacy when required?	YES / NO

### MANAGER'S TIME MANAGEMENT

<b>T1</b>	Does the manager also work on reception or as a nurse?	YES / NO
<b>T2</b>	If YES does the time spent on reception or nursing exceed 20% of your total working hours?	YES / NO
<b>T3</b>	Does your practice have 2 or more full time practitioners?	YES / NO
<b>T4</b>	Does your practice have 5 or more staff?	YES / NO
<b>T5</b>	If you have answered YES to T3 and T4 above: the manager should not cover reception/nursing duties unless absolutely necessary. Is this the case?	YES / NO
<b>T6</b>	Do you need to change your working arrangements based on the answer to T5? If NO go straight to E1	YES / NO
<b>T7</b>	How much do you think it would cost to make the change? Write your estimate here	£
<b>T8</b>	How many patient procedures would cover this cost? Write the number here	Approx
<b>T9</b>	What are the pro's and con's of making the change? Write a list on the reverse of this sheet	PTO
<b>T10</b>	What suffers if the change is not made? Write a list on the reverse of this sheet	PTO

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### HOW TO ACHIEVE WHAT IS EXPECTED

<b>E1</b>	Does the manager have his/her own diary and wall planner?	YES / NO
<b>E2</b>	Have the routine daily, weekly, monthly, quarterly and annual tasks been identified?	YES / NO
<b>E3</b>	Have the monthly, quarterly and annual tasks been booked on the wall planner with reminders in the diary?	YES / NO
<b>E4</b>	Do you make a list of urgent and important tasks on a Friday afternoon and separate the two categories?	YES / NO
<b>E5</b>	Do you refer to this list on a Monday to help prioritise the week ahead?	YES / NO
<b>E6</b>	Do you take time out every afternoon/evening (minimum 15 minutes) to focus and write down the next days tasks?	YES / NO
<b>E7</b>	Are you able to delegate as much as you would like?	YES / NO

### KEEPING UP THE MOMENTUM

<b>M1</b>	Do you have <b>regular</b> weekly briefing meetings with your practitioner/manager (30 minutes - 1 hour)?	YES / NO
<b>M2</b>	Do you have <b>regular</b> monthly management meetings with your senior team members to discuss and plan ahead?	YES / NO
<b>M3</b>	Do you use a communications notebook to record all tasks against outcomes/comments and review it regularly?	YES / NO
<b>M4</b>	Does the practitioner receive a weekly 'bullet point' update on urgent/important tasks from his/her manager?	YES / NO
<b>M5</b>	Do you feel that lines of communication are good and open at all times?	YES / NO

### MONITORING PROGRESS

<b>P1</b>	Is there an appraisal system in place for the manager?	YES / NO
<b>P2</b>	Is there a 'practitioner specific' appraisal system in place?	YES / NO
<b>P3</b>	Do the practitioner and manager agree to meet at least every 4 weeks to review this assessment exercise and its progress?	YES / NO
<b>P4</b>	Set the next review date now and record it here	DATE -