MGE management experts

Org Board and Teambuilding

Implementation Points

NOTE: This write- up is being provided as suggestions and ideas from which to apply the seminar information to your office. This is not to be taken as a guarantee that the information provided is appropriate to your practice. Each practice is individually responsible for ensuring that any system implemented complies with the applicable federal, state and local accounting, tax and employment laws, rules and regulations governing the place in which your practice is located. These suggestions do NOT constitute legal or accounting advice. You should seek advice from your own accounting and legal advisors as to what is appropriate to implement in your practice, prior to implementation. MGE: Management Experts, Inc. is not responsible for any claims, real or otherwise, associated with this document or any part thereof.

What follows is a summary list of implementation points from the seminar this weekend. Contact the Practical Department at MGE if you need any help or have any questions about these.

________**1.** If you have not done so already, make a large, laminated version of your organizing board. This can be done at a local copy shop. Make sure it has all of the basic functions that you want in it. This will be a temporary org board as you work with and finalize it.

________**2.** Using a dry-erase marker or label maker, post the org board based on what you came up with this weekend. Keep in mind that if a person is in charge of an area, you don't have to write their name next to each and every function.

________**3.** Place the org board on the wall in an area where the staff has easy access to it.

________**4.** Send a picture of the org board to the Practical Consultant for your practical file. This can be done via mail or e-mail (info@mgeonline.com put "Attention Practical Consultant" on the subject line).

________**5.** Have a meeting with all of your staff and review the org board. This should include: a) How it works, b) How to use it, c) The VFPs of each division and d) Who is doing what. Also, cover the definition of a team as covered in your seminar materials. Ensure you schedule enough time to get understanding and agreement as well as handle any questions and iron out who does what and who is responsible for what.

Implementation Points Continued

________**6.** During this meeting, inform the staff that they should keep you apprised of any functions not represented on the org board as they come up.

________**7.** If you are currently looking to hire, get rolling with your ads.

________**8.** Work out a checklist for the hiring and interview process so that you cover all of the points you wish to have covered.

________**9.** Establish a relationship with an employment attorney to answer questions you may have and review employee forms and procedures. Review any checklists or forms you develop based on this checklist (or any others youmight work out) with your attorney.

________**10.** Develop questions to determine the skill level of prospective technical staff.

________**11.** Work out the basic product of each position in your office and ensure each of your staff understand the product of their particular job(s).

________**12.** Develop checklists for:

a) *Putting new employees on post*. Ensure that this includes an orientation to the org board.

b) *Employee dismissal.*

________**13.** As covered in the article “Hats” on page 31 of your seminar pack, get brief write-ups done for each of the posts in your office (if you don’t have them already) and have your staff checked out on them.

________**14.** Now, work out a plan for how and when you’ll get full hats completed for key posts in accordance with the “Hats” reference.

________**15.** With all of the information you now have based on the steps above and having worked with your org board for awhile, it can now be finalized. For the final product you could have it professionally laid out by a graphic designer, laminated and framed (use labels for the names) or you can create one as covered in the Basic Organization course (i.e., blue formica, etc.).