🛠️ System Starter Template

"Make it Make Sense"—Creating Simple Systems That Keep Your Practice Flowing

Instructions: Choose a task in your practice that currently relies on one person's memory, expertise, or presence. Use this template to design a system that anyone could follow—even on a Monday morning when you're short-staffed and under-caffeinated!

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1. What's the task?
(Describe it simply)
Example: Closing out cash at the end of day or… Submitting lab cases (create a system sheet for each unique lab/case type)

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2. Who does it now? *(Who's the go-to person who has the most knowledge and experience?)*

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3. What often goes wrong when that person is out? *(Be honest! Chaos loves company.)*

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4. What's the ripple effect when it goes wrong? *(Late patients? Team stress or friction? Surprise redo costs? Lost patient confidence? Fall way behind in the day's schedule)*

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5. What are the key steps to doing this task well?
(List them briefly: what, where, when, how?)

- _____
- _____
- _____
- _____
- _____
- _____

6. Where will this system live?

☐ Printed guide

☐ Shared Google Doc

☐ Laminated checklist

☐ On the wall in [location]

☐ Other: _____

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7. Who else needs to be trained on this system? *(List backup folks or "floaters" who can jump in.)*

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8. What would make it *easier* to follow this system?
(Visual cues, labels, storage changes, etc.)

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- _____
- _____
- _____
- _____
- _____

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9. What's one way we'll test it out this month?
(Pilot day? Surprise day off for the usual expert?)

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10. What will success look like?

☐ The task gets done right, no matter who's there

☐ The team feels less stressed

☐ Patients experience seamless care

    ☐ Other:

    ☐ Other:

    ☐ Other: