BUSINESS ACADEMY OPERATIONS MANUAL

INTRODUCTION

We're calling this a Business Academy but the learning will be anything but academic. Instead, these sessions are intended to convey proven protocols and practical ideas that you and the clinicians in your group can use right away to increase profitability, efficiency and personal satisfaction in the small businesses you are running on a daily basis - otherwise known as your practices. If there is something that we have not covered in this manual, or if you have questions or suggestions at any time during the process, please do not hesitate to contact diana.escutia@seattlestudyclub.com or call 425.576.8000.

As a Seattle Study Club® director, you already know how to run a great meeting. As a result, much of the contents of this Business Academy Operations Manual will be a refresher course, particularly if you have decided to offer the Business Academy sessions to your existing membership. However, if you are using the Business Academy to connect with new and younger clinicians who are not part of your Seattle Study Club affiliate, there are some things you may want to consider before you launch. In essence, this will be like starting a new, mini-study club from scratch. Our goal is to make this as easy as possible for you and your coordinator. So let's get started!

1. RECRUITING

Initially you will need a name for your group. We recommend you list your group as Business Academy at "Your Study Club Name". This will allow you to brand your materials and communications. In as much as Business Academy at Seattle Study Club™ is our trademark, please do not utilize this name in any of your own materials.

Then identify the clinicians you want to be part of your Business Academy at Seattle Study Club™ group. It could be practitioners with whom you would like to have a closer relationship, or candidates to join your Seattle Study Club affiliate in the future. Or, it could be a subset of your existing club membership that you want to reward. This could be as many as 10 or 20 clinicians, or as few as 5 or 6. The number is up to you, but it's best to choose practitioners who you are close to, or have the potential to grow with you. The Business Academy programming represents an opportunity to re-engage your referral base, or it can be the way that you attract new and younger members to your club. Either way, your goal is to help these clinicians become the CEOs of their practices.

Ideally, recruiting should be done in person or on the phone, with follow up emails. Of course, many clinicians are too busy to meet in person or respond to a phone call during the day, just like you! In that situation it will be easier to send a few emails over the course of several weeks, with links that you can copy and paste to the items below. (Or, you may want to "save" the previews of the actual presentations and send the pertinent one the day before the meeting to the final group of participants, both as a reminder and to build interest in the upcoming session.) Alternatively, you could use an online service like Evite, PaperlessPost or Anyvite (which also allows you to send a recruiting invitation by SMS). Evite even has an upgrade that allows you to custom brand your invitations. Or, you could go the opposite direction and make your invitation to the Business Academy "old school." In that case you might consider hiring a calligrapher or a small letterpress house to create a classic piece on high quality paper and either have your coordinator hand-deliver them, or send them through the mail in a coordinating envelope. The idea here is to make the invitation to participate in the Business Academy sessions stand out and let the recipients know that you consider them to be special.

Recruiting Resources from Seattle Study Club:

- Digital Brochure
- Multiple Videos introducing:
  - Business Academy as a concept
  - Business Academy Structure/Curriculum
  - Inaugural Suite Overview
  - Previews of
    - Simon T. Bailey
    - Ken Runkle
    - Steve LeFever
    - Andy Boynton
    - John Sileo
- The Seattle Study Club/Business Academy Website

Whichever method you choose for recruiting, the key is to get your doctors to commit to attending all the sessions you are offering, as the earlier sessions are foundational for the later ones.

2. FINANCIALS (TUITION AND SPONSORSHIP)

- Tuition is entirely up to you (most are choosing to make this a gift and not charge participants).
- Consider asking a local bank or accounting firm if they would like to sponsor one or more sessions, and send a representative to the meetings.

3. CURRICULUM STRUCTURE & FREQUENCY

The Business Academy curriculum consists of 5 suites. Each suite has 5 modules or sessions. Each module runs anywhere from 90 minutes to 2 hours and has its own set of handouts and exercises. The modules will list the run time as well as the anticipated program time, which accounts for the exercises built into the module. This will help you to plan the timing for the individual sessions.

At the conclusion of each module, everyone in the group will be emailed links to related reading and at least 3 podcasts recommended by the Business Academy presenter.

The first suite is broad based in order to appeal to as many practitioners as possible and to provide a foundation for deeper exploration in subsequent suites. Once you have completed the first suite, you and your Business Academy at Seattle Study Club participants will select a second suite that provides a deeper dive in to a specific subject matter. You can find the suites and their contents here. You may think of a suite as an academic year, but we are purposely using the term suite, as you may decide you want to get together more frequently and move through more than one suite in a year.

Streaming these single-play sessions will allow your group to meet on whatever schedule you deem best. Given that you are running your Seattle Study Club affiliate every month from Sep-June, we would recommend you plan to get together every 6-8 weeks for your Business Academy sessions. This allows you to get through one suite/5 modules in 30-40 weeks, roughly matching the academic calendar. It also gives your participants time to begin to implement what they are learning. Alternatively, you could meet quarterly, meet monthly, or even hold a 2-day retreat and complete an entire suite in a weekend (in this scenario, you may want to consider inviting spouses to the Leadership, Cyber Security and Profitability sessions).

In sum, every time you purchase a suite, you and your Business Academy participants will receive:

- 5 prerecorded single-play modules, including interactive components and podcasts to support learning objectives.
- 2 Live Stream Presentations for members to access from home (pre-scheduled dates each year).
- Members-only access to additional short video lectures and business-related Expert Tips.

4. TECHNICAL SPECIFICATIONS

- Each of your participants will need an account at sscbusinessacademy.com. They may create their own account utilizing your Academy Number, or we can enter them for you if you provide us with the roster which must include name, email, cell phone and birthdate.
- There will be an identical "Directors Cut" of the video with single play access for you to review and prepare to facilitate the discussions/exercises. This will be available to you any time prior to the session itself.
- Each module has its own facilitation guide, and a copy of the slides for each exercise in that session so you can make notes to yourself about how you want to handle them when preparing to facilitate the session. Preparation is key to a well-run session.
- For the session itself, please secure a large TV or projector and screen to ensure that everyone can comfortably view and hear the video. Consider seating people in half-rounds so that everyone has a hard surface upon which to write or take notes on their devices, and an unobstructed view.
- External audio is strongly recommended. Set your computer to play the audio through the TV (via an HDMI connection) or attach an external speaker system. The audio is a critical element to get right.
- Because the video will be streamed, you will need a strong broadband internet connection. A minimum of 50 MBPS is recommended to ensure the highest-quality video and audio output. Please test your internet connection ahead of time via speedtest.net.
- Be sure to expand the video to play in full-screen mode before it starts. This will prevent any distractions and allow everyone to focus on the content of the program.
- When you see the exercise slide on screen (purple with the word "Exercise" at the top), that is your cue to pause the video. Practice this in advance if you don't know how; most browsers will allow you to utilize the space bar on your computer to pause and then play again. The exercise slides will remain on screen for 20 seconds, giving you plenty of time to pause.

5. OTHER CONSIDERATIONS

- As the director, keep in mind that you set the tone for the entire session. If you are engaged, enthusiastic, and actively involved, your participants will follow suit.
- In preparation for the meeting, have your staff print a full set of handouts for each participant. Remember to provide pens and notepads and/or a "keeper" notebook. By "keeper" we mean something nice enough that it won't be forgotten or thrown away. Rather than providing generic items, consider branding this "swag" with your Business Academy name/logo.
- One day before the meeting, send each participant a link to the promotional video for that session (unless you have previously sent out the video during recruiting). This will prime the psychological pump and get them ready to engage with the materials during the session. Links to those videos can be found on the website.
- Plan on roughly 2.5 to 3 hours for the first session. Here is a sample timeline:
    - First 30-40 minutes
        - Welcome the participants and give an agenda or brief overview of the session.
        - If participants don't know each other, ask them to introduce themselves.
        - Discuss goals/objectives and expectations (see 6 & 7 below).
        - Ask everyone to write down 4-5 goals/objectives for their Business Academy experience. Put each person's paper into an envelope and seal it. At your final session,

        return the envelopes and ask everyone to open them and reflect on the extent to which they have met their goals as a result of their participation in the Business Academy.

- Next 90 minutes (Simon T. Bailey with exercises)
    - The time periods specified for the exercises are just suggestions. If you go longer or shorter with any of them, that's just fine. If your group is really engaged in great discussion about a particular subject area, let them keep exploring it. Simply be mindful of the total time your group will be participating.
- Final 30 minutes
    - Have everyone log into their Business Academy account and access the quiz for this session. The AGD considers these programs self-study and in order to issue them CE Credits, participants need to demonstrate mastery of the material. We have provided a simple 5 question quiz for each session that you can all take together. Completion of this quiz allows us to issue credits to each participant.
    - Discuss follow up:
        - Remind everyone to check their emails for:
            - Links to several podcasts recommended by Simon Bailey as follow-up to the session.
            - A recommended reading list provided by Simona Bailey for those who wish to explore the topic further.
            - CE form and Evaluation Link.
            - Reiterate the date, time and place for the next meeting. If you don't already have everyone's cell numbers, get them now so that you can text meeting reminders in future.

Listening to the podcasts over the weeks following the session will give participants additional information on the topic and reinforce the content they just heard. Encourage your members to take advantage of these resources as they are designed to help them implement what they are learning as opposed to just consuming information.

6. GOALS AND OBJECTIVES

There is no requirement to set goals and objectives, but they can clarify the purpose of the Business Academy sessions and help members understand and appreciate what they will be learning. In addition, goals and objectives can guide learning behaviors and keep members focused. Goals and objectives are not one and the same. They work together to serve two different purposes. Simply put, a goal is a broad statement that describes what someone hopes to achieve, while objectives are the actions taken to achieve the goal.

Setting goals and objectives should also make the sessions run in a more orderly and organized manner. When directors have a strong sense of the goals and objectives of a session, they are more likely to keep members on track to reach them. Members will appreciate this because it shows that you value their time.

Here is a sample of goals and objectives put together for the first session by Dr. Mark Silberg for his group:
Goals and objectives of the first session:
1. Get to know the other participants.
2. Have participants clearly state what they want to get out of this course and our time together.
3. Come away with a clearer understanding of your role as a leader in your practice.
4. Be able to use the exercises to create better communication tools to use with your patients and with your team.
5. Recognize the tools of leadership and create a plan to use them in your office.
6. Outline/list your goals for the next 1 and 3 years.
7. Describe the current culture of your practice and list 3 things about your culture that you will change in the next 12 months.
8. Create an action plan for yourself.

7. EXPECTATIONS

As with goals and objectives, there is no requirement that you set expectations for your group, but they can be helpful. Expectations act as guidelines that everyone agrees to follow in order to have a meeting run smoothly. They also give you, the director, a way to objectively temper distracting members by reminding everyone of that agreement if things start to get out of hand.

Some examples of expectations might include:

- Sessions will begin promptly—please be on time.
- No side conversations in small groups.
- Listen carefully, speak intentionally, and don't dominate discussions.
- Focus on engaging with the content; sarcastic remarks during a session take everyone out of the moment.

Here is a sample of expectations put together by Dr. Mark Silberg for his group:
• Be clear on what you want to get out of the course.
• Confidentiality. What is shared in the room stays in the room. We all need to trust one another.
• Be authentic. No grandstanding.
• Leave your "I already know that" at the door. Be willing to not know.
• Be your word.
• Be on time.
• Don't miss any sessions.
• Be in gratitude.
• Listen carefully, listen with compassion and speak with intention.

8. CONCLUSION

As you have likely gleaned from this operations manual, you have tremendous flexibility to put your own stamp on the Business Academy sessions. You can keep them as small as you would like to, or expand them to include every member of your club. You can offer just the proposed curriculum, or you can embellish it with additional reading and discussion sessions. You can employ the latest and greatest digital distractions, or not. It's up to you to determine how best to communicate with your intended audience. We are here to help you in any way that we can.

Questions? Contact greg@seattlestudyclub.com or call 425.576.8000.