Practice Networking

Visitor Checklist

This checklist is intended to give you some things to think about before you visit another practice.

Pre-visit Planning:

→ **Determine 'fit'.** Call the practice to determine that they have the kind of information that you are seeking. Make sure the practice is a good "fit" and that your time will be well spent.
→ **Discuss format.** Determine what kind of meeting format will work best. For example, some teams like to start the visit with a meeting,, followed by observation. Others prefer to observe and ask questions at the same time.
→ **Schedule a time.** Schedule a date and time and confirm it with other members of your team who will be attending.
→ **Be prepared.** Meet with your team to discuss what you would like to get out of the visit.

Day Before Visit:

→ **Confirm with your team.** Print directions, if needed.
→ **Confirm with host.** Confirm with the practice that your team is coming to visit. Make sure they know how many people to expect.

Day of Visit:

→ **Be on time.**
→ **Take notes.** Consider assigning a member of your team to take notes for later discussion.
→ **Utilize time wisely.** Get your key questions answered, ask for copies of specific tools, forms, policies, etc.

Day After Visit:

→ **Show appreciation.** Consider sending a 'Thank You' note to the host practice.
→ **Evaluate.** Complete the online evaluation form to let us know how your experience was so that we can continue to make improvements to the process.

1-3 Months Post Visit:

→ **Follow-up.** Consider checking in with your host to discuss your progress or get other questions answered.