Stop Losing Great Staff
Build a Team that Stays

We get it — running a busy clinic is a juggling act, and losing good staff is stressful. That's why we created this checklist: to help you spot the hidden gaps in leadership, culture, systems, and staff engagement before they become a problem.

Packed with mini-audits, quick wins, and practical tips, it's your guide to creating a workplace your team actually wants to stay in.

How to Use the Checklist

Inside this checklist, you'll find seven key areas that have the biggest impact on keeping your team happy, engaged, and sticking around.

Each section comes with simple tick boxes, mini-audits to help you spot what's working (and what's not), quick wins you can implement straight away, and practical tips to make How to Use the c real improvements.

- Go through each section and tick the statements you confidently meet
- Take note of any sections with fewer than four ticks — these are your priority areas for improvement
- Use the mini-audits to see what's working and what might need attention
- Implement the quick wins straight away for immediate impact
- Check out the tips & suggestions to guide longer-term improvements
- By the end, you'll have a clear picture of your practice's strengths and gaps and ready-to-use actions to build a stronger, more motivated team

Leadership & Management
(People leave managers, not jobs)

☐ I have regular 1:1 check-ins with staff
☐ Feedback is consistent, calm, and timely
☐ I address conflict early and professionally
☐ My team feels safe to speak up
☐ I invest in my own leadership growth
☐ I stay composed, fair, and consistent under pressure
☐ I set clear expectations for behaviour and performance
☐ I model work-life balance and professionalism
☐ I actively recognise staff contributions

Mini-Audit
- When was the last time each team member received positive feedback?
- Do staff hesitate to approach you with problems? Why?
- Are issues escalated or left unresolved?

Quick Wins
• Introduce a weekly 10-minute "How are you going?" check-in.
• Use the "24-hour feedback rule": address good or bad behaviour within 24 hours.
• Schedule monthly leadership reflection: what worked, what didn't?

Tips & Suggestions
- Keep a leadership journal to track issues and follow-ups.
- Seek mentorship or peer support to refine leadership skills.
- Celebrate small wins to reinforce behaviours you want to see.

Culture & Communication

(Culture is the invisible system that guides your team — how they communicate, collaborate, and care, even under pressure)

☐ Staff are aware and understand practice values and mission
☐ Team meetings are consistent and purposeful Team meetings are consistent and purposeful
☐ Wins and good work are regularly acknowledged
☐ Tension or issues are addressed early
☐ Staff understand how their role impacts the whole practice
☐ Communication is transparent and respectful
☐ Staff treat each other with respect consistently
☐ Staff feel safe to raise concerns without fear
☐ Values are lived, not just displayed on a wall

Mini-Audit

- Do staff roll their eyes when you say "team meeting" or do they engage?
- Are conflicts or negative behaviours addressed promptly?

Quick Wins

• Start every meeting with 2 minutes of positive recognition.
• Use a shared "Communication Standards" mini-guide.
• Celebrate one small win daily.

Tips & Suggestions

- Observe interactions during high-stress periods — culture is most visible then.
- Rotate responsibilities to encourage collaboration.
- Reinforce behaviours aligned with values in every meeting.

Onboarding & Expectations

(Retention starts before day one)

☐ New hires receive welcome information prior to commencement
☐ New hires receive clear expectations
☐ Onboarding is structured (not informal or rushed)
☐ Weekly check-ins for new hires occur for at least 4 weeks
☐ Team understands performance standards
☐ Exit feedback is collected and used
☐ New hires know who to approach for help
☐ Learning resources are easily accessible
☐ Progress is monitored and feedback given early

Mini-Audit

- Could a new hire confidently describe their responsibilities within 7 days?
- Are onboarding gaps causing mistakes or stress?

Quick Wins

• Create a 7-day, 14-day and 30-day onboarding plan.

• Give all new hires a "Success Guide" outlining expectations.

• Schedule early check-ins to spot and correct misunderstandings.

Tips & Suggestions

- Pair new staff with a mentor or buddy for the first month.
- Ask for feedback on the onboarding process to improve it continuously.
- Celebrate milestones in the first 30 days to reinforce engagement.

Burnout, Workload & Staff Support

(You can't retain staff living in survival mode)

☐ Workloads are realistic and balanced

☐ Mental health is acknowledged

☐ Leave is respected, not guilted

☐ Staff can speak up safely when overwhelmed

☐ Flexibility is practiced, not just policy

☐ Staff know how to ask for support

☐ Stress levels are monitored and addressed proactively

☐ Team workload is reviewed regularly to prevent burnout

Mini Audit

- When did you last check on staff workload levels?
- Are there patterns of repeated stress or absenteeism?

Quick Wins

• Weekly "pressure check": Ask, "What is currently too much?"

• Rotate duties to avoid burnout patterns.

• Introduce short mindfulness or wellbeing breaks where feasible.

Tips & Suggestions

- Schedule informal check-ins with each staff member about workload.
- Encourage use of leave before stress accumulates.
- Adjust workflows based on real-time feedback.

Compliance, Operations & Stability
(Good systems reduce stress and mistakes)

- [ ] Policies and procedures are up to date
- [ ] SOPs exist for all key tasks
- [ ] Staff are trained and competent
- [ ] Risk and compliance checks are regular
- [ ] Privacy and regulatory standards are maintained
- [ ] Staff know how to access key procedures
- [ ] Systems are reviewed quarterly
- [ ] Emergency or contingency plans are documented and tested

Mini-Audit
- Could any staff member find the correct SOP within 10 seconds?
- Are compliance errors being caught early or too late?

Quick Wins
• Review one SOP per week as a team.
• Keep compliance documents in one easy-access digital folder.
• Assign responsibility for quarterly system audits.

Tips & Suggestions
- Involve staff in system updates to increase ownership.
- Use visual reminders for key compliance tasks.
- Document changes and communicate them clearly to all.

Mini-Audits & Quick Wins Hub
(Tiny improvements = massive retention results)

- [ ] Monthly 15-minute retention review
- [ ] "How are we tracking?" culture pulse survey
- [ ] New-hire integration checklist
- [ ] Weekly burnout check
- [ ] Monthly leadership reflection prompt
- [ ] Recognition check — are all team members acknowledged?
- [ ] Quick wins list updated weekly

Quick Wins
• Pick ONE improvement per week.
• Document the before/after impact.
• Celebrate small wins to reinforce momentum.

Tips & Suggestions
- Encourage team input on what mini-audits should cover.
- Track progress visually so improvements are visible.
- Rotate ownership for mini-audits to build accountability.

Understanding Staff Turnover
(The real reasons people leave)

☐ We analyse turnover patterns every quarter
☐ We understand early warning signs and act on it
☐ We act on exit feedback
☐ We address cultural or leadership issues quickly
☐ Trends are shared with leadership for corrective action
☐ Retention strategies are reviewed and updated annually

Mini-Audit
- Think about your last 5 resignations. What themes appear?
- Were any preventable with early intervention?

Quick-Wins
- Introduce an anonymous "Stay Interview" (chat with employee finding out the reasons they stay with you) every 6 months.
- Review exit feedback with leadership and implement one immediate change.

Tips & Suggestions
- Compare turnover patterns to benchmarks in your industry.
- Act quickly on early warning signs rather than waiting for resignation.
- Reinforce positive changes with team communication.

Leadership Deep Dive
(Premium Bonus Section — Exclusive to This Checklist)
Leadership is the biggest predictor of retention.

1. Leadership Presence & Emotional Stability
☐ I stay steady under pressure
☐ I don't withdraw, snap, or react unpredictably
☐ Staff trust my professionalism
☐ Staff feel comfortable approaching me

2. Communication Mastery
☐ Expectations are clear and simple
☐ I check for understanding
☐ Important messages are written + verbal
☐ I don't assume staff "should already know"

3. Coaching vs Managing
☐ I focus on development, not correction
☐ Feedback is specific, not vague
☐ I follow up with support
☐ I recognise strengths as often as weaknesses

4. Accountability & Fairness

- ☐ I am consistent with everyone
- ☐ I don't avoid difficult conversations
- ☐ I address underperformance early
- ☐ Staff see me as fair

5. Confidence & Boundaries

- ☐ I don't second-guess myself constantly
- ☐ I maintain professional boundaries
- ☐ I'm firm but respectful
- ☐ Staff see me as their leader, not their friend

6. Self-Leadership

- ☐ I manage my own workload well
- ☐ I model the behaviour I expect
- ☐ I invest in my own capability
- ☐ I ask for help when needed

7.Leadership Reflection Prompt

"If I were a staff member here — would I want to work for me?"

- Where would the answer be yes?
- Where might the answer be no?

☑ SCORING TABLE & RESULTS

Section	Score
Leadership & Management	_____ / 9
Culture & Communication	_____ / 9
Onboarding & Expectations	_____ / 9
Burnout & Workload	_____ / 8
Compliance & Systems	_____ / 8
Mini-Audits & Quick Wins	_____ / 7
Understanding Turnover	_____ / 6
Leadership Deep Dive	_____ / 24

YOUR RESULTS

- 🔴 **0–40 — High turnover risk**
- 🟡 **41–70 — Improving, but missing key foundations**
- 🟢 **71–90+ — Strong retention foundation**

Complete Your Action Plan
(Turn insights into action — your personalised roadmap to a happier, more stable team)

Use your checklist results to identify priority areas and plan practical next steps. Focus on the sections with fewer than four ticks first — these are the areas quietly driving turnover. Fill in your goals, assign responsibility, set realistic deadlines, and track progress.

Action Plan

Section	Area for Improvement	Quick Wins	Who	Target Date
Leadership & Management				
Culture & Communication				
Onboarding & Expectations				
Burnout & Flexibility				
Compliance & Systems				
Mini-Audits & Quick Wins				
Understanding Turnover				
Leadership Deep Dive				

Tips for Using Your Action Plan
- Focus on **1–2 high-priority sections at a time** to avoid overwhelm
- Assign **clear responsibility** — even small actions need an owner
- Set **realistic deadlines** and track progress
- Revisit the plan **monthly** to celebrate wins and update actions
- Reflect on your **learning and improvements** — growth is continuous

Let's Build a Team That Stays

Helping healthcare practices build teams that stay, thrive, and succeed.

Take the Next Step

If this checklist helped you spot gaps and discover quick wins, imagine what a **personalised strategy session** could do. Book a **free 20-minute session** with me, Bernadette Beach, to get expert guidance tailored to your practice — from leadership and culture to systems and staff engagement.

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