



# UNCHARTED *Homecoming*

April 21-23, 2022  
Greenville, South Carolina







TABLE OF  
**CONTENTS**

2	<b>SCHEDULE OF EVENTS</b>
5	<b>SPONSOR THANK YOU</b>
6	<b>NIGHT OUT MAP</b>
7	<b>SCAVENGER HUNT</b>
8	<b>HOTEL MAP</b>
9	<b>CREATE YOUR OWN ANCHOR GANG 5K</b>
10	<b>COLLABORATION SKILLS FOR GROWTH &amp; CULTURE</b> <i>with Dr. Andy Roark</i>
18	<b>STOP TRYING TO DO IT ALL: QUALITY OVER QUANTITY MARKETING</b> <i>with Dr. Caitlin DeWilde</i>
21	<b>TEAMWORK MIND MELD: SETTING EXPECTATIONS FOR TEAM COMMUNICATION</b> <i>with Stephanie Goss</i>
30	<b>PSYCHOLOGICAL SAFETY: YEP, IT'S THE REASON TEAMS SUCCEED</b> <i>with Dr. Phil Richmond</i>
34	<b>MOVING THE TEAM FROM DAILY SUCK TO SUBLIME</b> <i>with Dr. Jen Quammen</i>
41	<b>SERVANT LEADERSHIP IS NOT MARTYRDOM</b> <i>with Dr. Michael Miller</i>
47	<b>CUT THE BULLSH*T: STREAMLINING AND SYSTEMATIZING THE CLIENT EXPERIENCE</b> <i>with Dr. Sarah Wolff</i>
53	<b>CHOOSE YOUR OWN ADVENTURE</b>
59	<b>PRIORITIZATION WORKSHOP</b>
61	<b>SOCIAL MEDIA CONTEST</b>
66	<b>YEARBOOK PAGE</b>

# SCHEDULE OF EVENTS

Thursday, April 21, 2022

<b>3:00pm</b>	Registration Opens	<i>Westin Hotel Lobby</i>
<b>6:00pm-7:00pm</b>	Opening Ceremonies	<i>Poinsett Ballroom /Mezzanine</i>
<b>7:00pm-8:15pm</b>	Welcome Reception & Dinner	<i>Poinsett Ballroom</i>
<b>8:15pm-9:30pm</b>	Choose Your Own Adventure	<i>Poinsett Ballroom</i>
<b>9:30pm-10:00pm</b>	Keynote, <i>Andy Roark</i>	<i>Poinsett Ballroom</i>

## Thank You To Our Sponsors!



## Friday, April 22, 2022

**7:30am-8:45am** Breakfast

*Gold Ballroom*

Sponsored by:



**9:00am-10:00am**

Collaboration Skills  
for Growth & Culture

*Andy Roark*

*Gold Ballroom*

**10:15am-12:00pm**

**Workshops and Lectures**

*Gold Ballroom*

Stop Trying to Do It All: Quality Over Quantity Marketing  
*Caitlin DeWilde*

*Poinsett  
Ballroom*

Teamwork Mind Meld: Setting Expectations for Team Communication  
*Stephanie Goss*

*Card Room*

Psychological Safety: Yep, It's The Reason Teams Succeed  
*Phil Richmond*

*Francis-Marion  
Room*

Moving the Team from Daily Suck to Sublime  
*Jen Quammen*

**12:00pm-1:30pm**

Lunch

*Gold Ballroom*

**1:30pm-2:30pm**

**Choose Your Own Adventure**

*TBA*

**2:30pm-2:45pm**

Stretch Break

**2:45pm-3:45pm**

**Choose Your Own Adventure**

*TBA*

**4:00pm-5:15pm**

**Mic Drops**

*Gold Ballroom*

**5:15pm-6:15pm**

Break Time

**6:15pm-10:00pm**

**Homecoming Night Out**

## Saturday, April 23, 2022

**6:30am-7:30am**

**Morning Mindset Activities (Optional)**

Get active with your new friends! There are lots of options within walking distance of the Westin Poinsett and even some special events that happen nearby.

**7:30am-8:45am**

**Breakfast**

*Gold Ballroom*

**8:45am**

*GROUP PHOTO - DON'T BE LATE!*

**9:00am-10:15am**

**Table Discussions**

*Gold Ballroom*

**10:15am-10:30am**

Morning Break

*Gold Ballroom*

**10:30am-12:15pm**

**Workshops and Lectures**

*Gold Ballroom*

Stop Trying to Do It All: Quality Over Quantity Marketing  
*Caitlin DeWilde*

*Poinsett  
Ballroom*

Teamwork Mind Meld: Setting Expectations for Team Communication  
*Stephanie Goss*

*Card Room*

Servant Leadership Is Not Martyrdom  
*Michael Miller*

*Francis-Marion  
Room*

Cut the Bullsh\*t: Streamlining and Systematizing the Client Experience  
*Sarah Wolff*

**12:15pm-1:45pm**

Lunch

*Gold Ballroom*

**1:45pm-2:45pm**

**Choose Your Own Adventure**

*TBA*

**3:00pm-4:30pm**

**Prioritization Workshop**

*Gold Ballroom*

**4:30pm-5:00pm**

**Group Feedback**

*Gold Ballroom*

**5:00pm**

**Tribe Goodbyes**

# THANK YOU TO OUR SPONSORS

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Transforming Lives



# NIGHT OUT MAP



**COOK'S STATION**  
515 Buncombe St.

**TUPELO HONEY**  
1 N Main St

**WESTIN**  
HOTELS & RESORTS  
120 S. Main Street

# Greenville SCAVENGER HUNT

It's time to say hello to Greenville! Take your team on this fun Scavenger Hunt to snap photos and answer these icebreaker questions. Meet back in the Gold Ballroom when you're done!

- 1 How long have you been waiting to come to Greenville? Snap a photo with the clock in Main St. Square!**  
*If you could take a week off from your regular life to immerse yourself in learning something new, what would it be?*
- 2 Get creative and spell out U-V-C in front of the Westin Poinsett!**  
*What is the best book you've read that has impacted your journey in your role?*
- 3 Pick your favorite tune from the Uncharted Anthems playlist and dance it out with your team in front of the Peace Center.**  
*What do you appreciate the most about UVC?*
- 4 Put the "I" in the Greenville mural in Camperdown plaza. (tag the artist)**  
*What's something new you've learned about yourself in the last three months?*
- 5 Make waves! Do the wave with as many UVCers as you can gather outside.**  
*What moment in your veterinary medicine career has brought you the most joy?*
- 6 Take a photo with something named for a flower that made its USA appearance for the first time here in Greenville!**  
*What current fact about your life would most impress your five-year-old self?*
- 7 What year was the first Uncharted conference? Find something with that year on it and snap a photo.**  
*What are you most looking forward to about 2022?*
- 8 Visit a Greenville foodie favorite (favorite restaurant or dessert spot!)  
\*Tag the business for a social media scavenger hunt bonus point\***  
*You're going sail around the world, what's the name of your boat?*



**Don't Forget!**  
Use #unchartedapril  
Tag @unchartedvet on social  
Make your Instagram profile PUBLIC



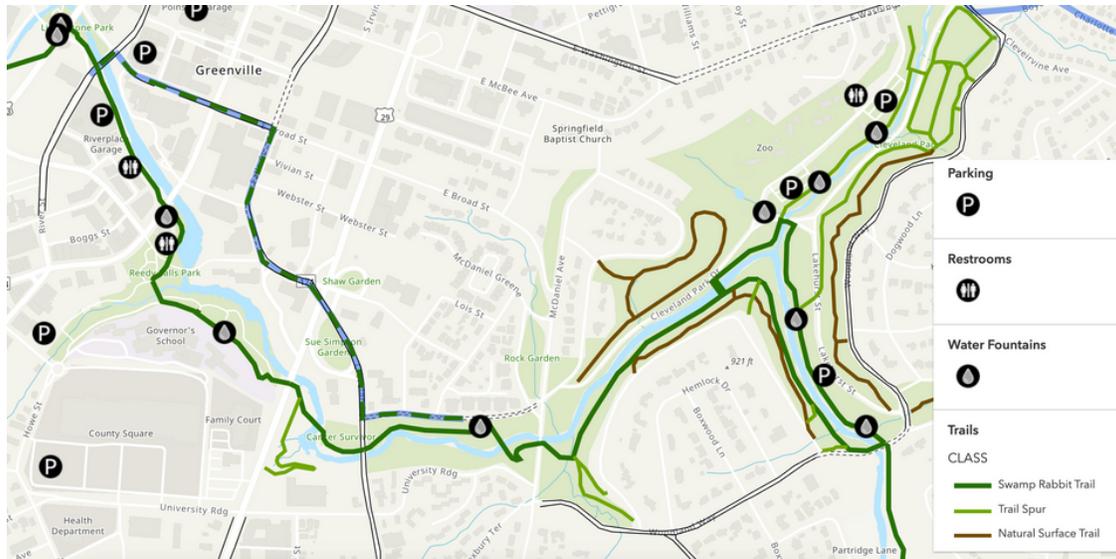
UVC ANTHEMS



# THE ANCHOR GANG 5K

## OPTIONAL EXERCISE IDEA

### SWAMP RABBIT TRAIL



Map source:

<https://citygis.greenvillesc.gov/swamprabbittrail/index.html>

### Looking for ways to fill your early morning hours?

Create your own Anchor Gang 5k right here in Greenville! The Swamp Rabbit Trail is only minutes from the Westin Poinsett. Our friend, Katie B. suggests starting in Falls Park and turning left onto the trail (there is a rubberized section for runners)!

This is just one of many different ways you can stay active during your conference stay. Choose your own adventure!



# Collaboration Skills for Growth & Culture Survival Guide for Getting Team Buy-In

10

Andy Roark

## **PROGRAM OVERVIEW**

- 1 Pre-Plan**  
Mentally prepare and pre-plan before starting conversations.
- 2 Lay the Ground Rules**  
This is an explanation of what's about to happen and a few rules that everyone will need to follow to keep the conversation productive.
- 3 State the Problem**  
Without proposing solutions, establish that a specific problem exists within your practice.
- 4 Get Agreement on the Problem**  
Re-frame and re-state the problem until it exists in the words of your team and is a size that can be addressed in a limited timeframe (e.g. 1-3 months)
- 5 Brainstorm Solutions to the Problem**  
Without presenting a plan, encourage brainstorming of how the stated problem can be addressed.
- 6 Integrate Your Proposed Solutions with Your Team's Solutions**  
Integrate your ideas into the discussion by supporting the comments of others. Add remaining ideas at the end of this discussion.
- 7 Set Priorities**  
Determine which solutions come first
- 8 Develop Action Steps**  
Break solutions into specific action steps
- 9 Set Timeline and Assign Action Steps**  
Assign a lead person to each action step and a deadline to have the action step accomplished
- 10 Monitor Progress and Reward Success**  
Use ongoing feedback to reinforce project advancement. Celebrate victories.

# Collaboration Skills for Growth & Culture Survival Guide for Getting Team Buy-In

11

Andy Roark

## 1 Pre-Plan

### GOAL:

Have a clear idea of what you hope to accomplish, what opposition you will encounter and how you will frame the benefits of overcoming this problem.

### QUESTIONS TO ANSWER:

- What problem do you want to address?
- Is this the real problem or a symptom of another problem? (5-Fold-Why exercise)
- What options do you see for addressing this problem? (List as many as possible)
- Can/should this problem be broken into smaller, more manageable problems?
- Are you in a mental place where you can let go of these solutions if your team has equally acceptable solutions they are more excited about?  
(If not, postpone this meeting)

## 2 Lay the Ground Rules

### GOAL:

Tell your team what's coming, make them feel safe, keep the conversation productive.

### IMPORTANT POINTS:

Start by validating your team and focusing on the positives of how things are going. Then, talk about how you want to build on the good that is happening. This meeting is meant to do that.

You want this meeting to:

- Be positive and constructive. We want to talk about how we can grow, not how we have messed up in the past.
- Be safe. No one is going to get in trouble for what they say here. We want to hear what you honestly think so we can make things better going forward.
- Be productive. Everyone has the right to speak and everyone has the right to be heard.

### QUESTIONS TO ANSWER:

- Is everyone okay with these rules for our meeting?
- Are there any questions or concerns?

# Collaboration Skills for Growth & Culture Survival Guide for Getting Team Buy-In

12

Andy Roark

## 3 State the Problem

### GOAL:

Introduce the idea that there is a problem in a non-judgemental way.

### IMPORTANT POINTS:

Focus on development/growth/improvement instead of evaluation/criticism. (e.g. "We are doing a great job. I want to talk about ways we can smooth out one of our headache spots. Are you all up for discussing this with me?")

This is where you lay out your WHY. If your team doesn't think the WHY is important, they will not have interest in investing their time and energy into fixing it.

You don't want to give them YOUR problem. You want to draw them into discussing what THEIR problem is. **Bring up the problem area, and ask them if they have specific ideas about what the problem actually is.** Record these on a flip chart/whiteboard for everyone to see. Avoid blame in your meeting. Don't let this turn personal.

Behaviors can be problems, but people should not be.

The problem needs to be something they believe exists, and the vision of working without this problem needs to resonate.

### QUESTIONS TO ANSWER:

- What is the real problem?
- Why do you think this problem is occurring?

## 4 Get Agreement on the Problem

### GOAL:

To get as many of your team to comment on the problem as possible, and to state the problem using their words.

### IMPORTANT POINTS:

- Use closed questions to get engagement, and then lead into your open-ended questions
- Show of hands... who here has been frustrated with \_\_\_\_\_?
- What exactly do you all find frustrating about the way we do \_\_\_\_\_?
- Okay... has anyone else had this experience/felt this way/seen this?
- Can you explain what you mean when you say that?

# Collaboration Skills for Growth & Culture Survival Guide for Getting Team Buy-In

Andy Roark

## 5 Brainstorm Solutions to the Problem

### GOAL:

Get buy-in from the group and make sure they feel ownership of the ultimate solution that is chosen. Get some or all of your solutions up for consideration, ideally being put forward by others so you are endorsing a team idea instead of presenting it yourself.

### IMPORTANT POINTS:

Stress right away that this is just a brainstorming exercise and no one is committing to anything.

Relatedly, **there are no bad ideas.** (This will prevent negativity and shooting down ideas before they get fleshed out. It will also keep the meeting moving forward instead of letting it get bogged down in discussion of details).

Write everything down to create an atmosphere that feels open and unbiased.

It's important to get the "right" goal. It can't be too large, and it needs to advance the practice goals.

### HELPFUL PHRASES

"Help me troubleshoot this problem."

"There are no bad ideas. We're just getting all of our possible options out."

"What would be ideal if we could do it?"  
*(Focus on what's possible, not on specifics/objections)*

### NOTES

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# Collaboration Skills for Growth & Culture Survival Guide for Getting Team Buy-In

14

Andy Roark

## 6 Integrate Your Proposed Solutions with Your Team's Solutions

### GOAL:

Get solutions you are interested in pursuing up on the board with as little direct pressure from you as possible.

### IMPORTANT POINTS:

Your team is less likely to feel ownership of ideas that come from you (leadership) than from within their own ranks. If they propose a solution, it's more likely to take root than if you propose it.

You celebrating an idea that came from your staff is more effective than you putting it forward yourself.

Lead with open-ended questions. (e.g. "Are there other ideas about how we could address this? Are there things we could do with our workflow to make this smoother? Are there things that the pet owners would see value in that we aren't doing but could?")

If your solutions aren't getting suggested, that's fine. Try to relax and be the last person to speak. You can put forward your ideas at that time. If you go earlier, you run the risk of shutting down further conversation.

Remember "yes, and" to agree with points that are being made while keeping the conversation going in a productive direction.

## 7 Set Priorities

### GOAL:

Select a few discrete solutions that the team is excited about and get them implemented.

### IMPORTANT POINTS:

Buy in from the team is the most important thing here. You're generally better off with a second-tier plan that everyone is excited about compared to a first-tier plan that no one but leadership wants.

In engaged, vocal groups, you may be able to do this with an open vote or with open discussion.

In quieter groups, we may need written selection processes so that introverts will engage.

### QUESTIONS TO ASK:

- If we could only do 3 things on this list, which three would they be?

# Collaboration Skills for Growth & Culture Survival Guide for Getting Team Buy-In

15

Andy Roark

## 8 Develop Action Steps

### GOAL:

Break the selected solutions up to action steps that can be implemented, measured and accomplished.

### IMPORTANT POINTS:

Action steps should be measurable, specific and attainable.

When in doubt, make them smaller in scope and move through them faster.

If your team comes up with the action steps, they are more likely to do them.

### QUESTIONS TO ASK:

- How should we break each solution up into action steps so we can share the work and support each other?

## 9 Set Timeline & Assign Action Steps

### GOAL:

Each action step should have someone who is responsible for it, and that person should know when the action step is due.

### IMPORTANT POINTS:

Having people volunteer to do an action step is more valuable than having you assign action steps.

Deadlines I have found to be most effective are 7 days, 14 days and 30 days. 90 days is the farthest out I recommend going.

## 10 Monitor Progress and Reward Success

### GOAL:

Once the plan is made, someone needs to manage it, remind people of their obligations and hold them accountable. Successful efforts should be sincerely praised (publicly or privately depending on the person). Group success should be celebrated.

### IMPORTANT POINTS:

Assign a program manager to watch action step deadlines if you can't/won't.

Make results as visible as possible so the program is not forgotten.

# Group Worksheet for Team Buy-In

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Andy Roark

*Getting everyone on the same page to make changes in your vet practice can be challenging. These questions are meant to help guide your team discussion.*

## GROUND RULES

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- Be positive and constructive. This is a conversation about how to make your clinic better, not what has gone wrong in the past, or who should be blamed for any failings.
- Be safe. No one is going to get in trouble for what they say here. Your honest thoughts and opinions are important so that your clinic can become the best practice it can possibly be.
- Be productive. Everyone has the right to speak and everyone has the right to be heard. Make sure to listen to and support your teammates, and they will do the same for you.

## DISCUSSION QUESTIONS

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### GROUND RULES

- Are you comfortable with the ground rules?
- If not, can you explain why?

### STATE THE PROBLEM

- Do you agree that there is an area of our practice that could be improved? Why or why not?
- What do you think the real problem is in this area? (Sometimes problems in our practices are actually just symptoms of other problems. Do you think that is happening here?)
- Why do you think this problem is happening?

### BRAINSTORM SOLUTIONS (THERE ARE NO BAD IDEAS)

What are some things we could possibly do to make this problem go away, or at least make it less frustrating?

### SETTING PRIORITIES

Which of these possible solutions do you think would be most helpful? Which ones would be easiest to implement in our practice?



# Stop Trying to Do It All: Quality Over Quantity Marketing

Caitlin DeWilde

## ACTION STEPS

- Identify your why(s): new client acquisition, building loyalty, outshining the competition, increasing utilization of a particular service, product or technology, etc.
- Identify your "RIGHT" client
- Build your VIP Client List
- Survey Your Clients and Team to Narrow Your Marketing Focus
- Test out ONE new software or workflow to help marketing work easier
- Prepare for marketing that's coming **TOMORROW**:
  - Claim your pages
  - Keep an eye on how new clients are finding you

## RESOURCES

### *Building Your VIP Client List:*

Check out my latest article in Today's Veterinary Business for the how-to!

### *Survey Your Clients & Team*

Ask your clients and team what THEY want to see on your social media pages and marketing efforts... or what problems marketing can solve. See attached forms or visit/scan to customize these Jotform templates to share with your peeps.

**My Jotform Template**



## Softwares & Workflows to Make Marketing Work Easier

### *Asynchronous Communication Platforms*

Keep patient photos out of your text threads and upload to a **Slack** channel, shared **Google Drive** (with a folder for each month or week's patient photos).

### *Project Planning & Organization Platforms*

Take advantage of a content calendar and a task management system, so you know who is doing what, when, and get a notice when the work's been done.

- Asana
- BaseCamp
- Google Sheets



**My Content Calendar Template**  
(just click File > Make a copy to customize)

### *Marketing Asset Organization*

- Google Drive
- Canva (Canva Pro is definitely worth it to save your brand logos, fonts, colors and templates).

# Stop Trying to Do It All: Quality Over Quantity Marketing

Caitlin DeWilde

## Softwares & Workflows to Make Marketing Work Easier

### *Nitty Gritty Scheduling Tools*

- **Facebook alone:** use Meta Business Suite
- **Facebook and Instagram:** use Meta Business Suite
- Instagram alone (posts and stories): use Meta Business Suite
- **Facebook and Instagram and ANY OTHER PLATFORM, or you want to build a library of evergreen content, or you want to have detailed analytics:** use a third party tool. This is also a must if you're managing multiple clinics or multiple clinic pages (e.g. also a page for boarding, daycare, etc). Favorite choices are:

- Buffer
- Hey Orca
- Planoly

### **My Brand Guide Template**



## Tips for Building a Workflow

- Identify who, what, when, where, why and how
- **WRITE. IT. DOWN.** and share with the team
- Ideally involve more than one person, and more than one access point (avoid everyone using one password!)

### Example Workflow

- **Who:** Technician takes the picture at each new patient visit (confirming that owner did not check the Opt-out box on new client registration form).
- **What:** Photo, to be used in patient's medical record and/or video for social media welcome.
- **When:** AFTER welcoming patient, doing initial vitals, history, etc. Posted within one week.
- **Where:** Exam room or treatment area. Photo posted ideally immediately with name and reason for visit to Slack #socialmedia channel. All photos to be posted by end of day.
- **Why:** To welcome new patients to the practice, encouraging new owners to follow the pages, and to add identification to medical record.
- **How:** Does it get on social media? Technician uploads to slack. Weekly during team member's allotted time on Tuesday she will review all photos in the Slack channel, and give them a "thumbs up" emoji when they have been posted.

### *Prepare for Marketing That's Coming TOMORROW*

- Be sure to include an area in new client registration form like one below
- Ask VIP list annually
- Claim emerging platforms and establish notifications, even if you have no plans to use them right now.
- Keep up on veterinary marketing trends when possible

### Ask for Feedback!

How did you hear about us?  Word of Mouth  Google  Facebook  Yelp  Instagram  Nextdoor  
 Other online \_\_\_\_\_



# Teamwork Mind Meld: Setting Expectations for Team Communication

Stephanie Goss

## WHY EXERCISE

### 10 Things I Am Good At (Make a List)

1. *I am good at...*

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### 10 Things That Inspire Me (Make a List)

1. *I'm inspired by...*

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**In reflecting on what inspired and continues to inspire you, please respond to the following questions:**

**What would you say your purpose is in the world?**

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# Teamwork Mind Meld: Setting Expectations for Team Communication

Stephanie Goss

**In reflecting on what inspired and continues to inspire you, please respond to the following questions:**

**What drew or called you to the Veterinary Industry?**

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**What motivates you?**

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**What makes you happy? Feel free to share a specific instance or memory.**

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**What excites you about your job and why?**

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**What part of your job is the biggest challenge for you and why?**

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**What would you say are some of your areas of opportunity or growth?**

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**How do you respond to change, and what can others do to help you at times of change?**

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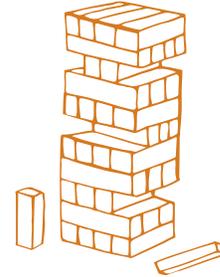
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# Teamwork Mind Meld: Setting Expectations for Team Communication

Stephanie Goss

## JENGA ICEBREAKER QUESTIONS



Buy an oversized Jenga set to play this game.  
Write ice breaker questions on each brick of the Jenga set.

Every brick that an employee pulls out, they need to answer the question on the brick. The game goes on until the Jenga tower falls.

Again, it brings people closer and gives out exciting facts about coworkers.

### Sample Questions:

*Which day of your life would you most like to relive?*

*Next year looks better to me because \_\_\_\_*

*Next year might not be my year because \_\_\_\_*

*Best vacation you ever had?*

*How do you cope with stress?*

*What is the first thing on your bucket list this year?*

## THE A-TEAM & OTHERS From the Manual of Me

Here's a little game to help you think of the skills, capabilities and type of people you value in a team. By using an 'impossible' task as a brief, the exercise will help you think about what skills you feel are necessary, but also possibly show where you think you have gaps in your own skill set, or where your superpowers lie, if you don't need that skill from someone else. It also can help you identify what type of people you often turn to or value in a team - do you always add a project manager? Do you always hope for a creative or a specialist as part of the team?

### Printable Worksheets:

*A-Team Impossible Tasks*



SCAN ME!

*A-Team Worksheet*



SCAN ME!



# Teamwork Mind Meld: Setting Expectations for Team Communication

Stephanie Goss

## TEAM AGREEMENT TEMPLATE

<b>Team Values</b> - What are our guiding principles?	<b>Collaboration</b> - How do we know what each other is doing?	<b>Wellbeing</b> - How do we care for ourselves and each other?
	<b>Communication</b> - How and when do we talk to each other?	
	<b>Information</b> - What information do we share? How do we access it?	

# Teamwork Mind Meld: Setting Expectations for Team Communication

Stephanie Goss

## TEAM AGREEMENT TEMPLATE

### Team Agreement

#### Information

- What kinds of information do you need to share?
- What kinds of information do you expect to be shared with you?

Shall we try out a communal task board such as [insert some options here]? Or any others?

Do you have preferences re: tools for sharing how you can be reached—such as [insert some options here]?

Do you have preferences re: tools for knowing what everyone is working on—such as [insert some options here]?

Do you have preferences re: standup/retrospective software—such as [insert some options here]?

Do you have any preferences re: time tracking tools such as [insert some options here]? Or any others?

#### Communication

In the chart, please note: the mediums you prefer to use for work purposes (add an “X” or note particular kinds of work); your preferred response times for each medium; and the mediums you prefer to use for social purposes.

Medium	Prefer for work purposes	Preferred response time	Prefer for social purposes
Email			
Group chat			
IM			
In person			
Phone			
Text			
Video conference			
Virtual office			

Do you have preferences re: group chat tools—such as [insert some options here]?

Do you have preferences re: video conferencing tools—such as [insert some options here]?

Do you have preferences re: Virtual Office tools—such as [insert some options here]?

Shall we have an established forum for sharing and discussing ideas—such as [insert some options here]? Or just bring up ideas in our regular meetings?

# Teamwork Mind Meld: Setting Expectations for Team Communication

Stephanie Goss

## TEAM AGREEMENT TEMPLATE

### Team Agreement

#### **Communication (cont.)**

We'll want to have an established forum for expressing appreciation of each other.

Some possibilities are Merit Money or Bonusly, and YouEarnedit. Would you like to try out any of those—or do you have other suggestions?

We'll also want to have an established forum for offering constructive feedback—such as with [insert some options here, perhaps including Feedback Wrap or a Virtual Pillow Fight]. Would you like to try out any of those—or do you have other suggestions?

#### **Collaboration**

[If your time spans more than one time zone] Which time zone should we use when scheduling activities?

Should we set (some) core hours for collaboration purposes?

Some tools that facilitate online collaboration include [insert some options here]. Would you like to use any of those—or do you have other suggestions?

### Other Questions to Consider

- Do you need to share your calendar or schedule with your team?
- If yes, consider which online calendars would serve your purposes; or, note that many task management apps include calendars within their functionality.
- Do you need to track productivity?
- Do you have security protocols in place?
- Do you need a secure connection when accessing any of your networks?
- Is there anything preventing your access to needed information?
- Does the team need access to an intranet, online file system, or database in order to complete their work?
- If yes, consider what kind of access, permissions, and security protocols they'll need to connect to the system.
- Are there any on the team who need support working with tools or technology?
- If so, consider your training options and/or if this factor should influence which tools you suggest.

### Recommended Resources

**The If Book** by Evelyn McFarlane

**The Five Dysfunctions of Team** by Patrick Lencioni

**All In: How Impactful Teams Build Trust from the Inside Out** by Rob Holman

Manualof.me - A Getting to Know Me Manual



# Psychological Safety: Yep, it's the Reason Teams Succeed

Phil Richmond

*"Psychological safety is not about being nice, it's about creating the space where honesty is truly possible."*

**-Dr. Amy Edmondson**



## EDMUNDSON'S TOOL

	Strongly Disagree	Disagree	Neither Agree/ Disagree	Agree	Strongly Agree
If you make a mistake in this team, it is often held against you.					
People on this team sometimes reject others for being different.					
It is difficult to ask members of this team for help.					
Members of this team are able to bring up problems and tough issues.					
It is safe to take a risk in this team.					
No one on this team would deliberately act in a way that undermines my efforts.					
Working with members of this team, my unique skills and talents are valued and utilized.					

*A positive response to the first five statements along with a negative response to the final two statements indicates strong psychological safety.*

# Psychological Safety: Yep, it's the Reason Teams Succeed

Phil Richmond

## Assessing Our Teams



by The Wellbeing Lab  
a Michelle McQuaid Program

Assess wellbeing, psychological safety and other workplace factors on an individual, team, and organizational level.

## Psychological Safety: It's Not About Being Nice

When workplaces feel challenging-but not threatening-we feel like we belong. A feeling of belonging is critical to team cohesion. This leads to a rise in oxytocin levels in the brain, eliciting trust and trust-making behavior (Zak & Knack, 2001). This has been found to be a huge factor in team success (Edmondson, 2012) as it encourages speaking up and taking smart risks because:

- Concern is alleviated about others' reactions
- Energy isn't wasted on fear-based behaviors, so clarity of thought is improved
- Productive conflict is supported
- Mistakes are readily discussed, enabling failures to be mitigated
- More novel ideas are shared, promoting innovation
- Instead of focusing on self-protection, people are focused on achieving motivating goals
- A climate is created that increases accountability.

### Additional Resources

#### **BOOKS:**

"The Fearless Organization" -Dr. Amy Edmondson  
"The 4 Stages of Psychological Safety"-Timothy R. Clark  
"Work Better Together"--Jen Fisher & Anh Phillips

**ARTICLES:** Duhigg, Charles. "What Google Learned From Its Quest to Build the Perfect Team." New York Times Magazine, Feb. 25, 2016

*"Avoiding uncomfortable, but useful states, keeps us from reaching our potential."*

**—Dr. Robert Biswas-Diener**

# Psychological Safety: Yep, it's the Reason Teams Succeed

Phil Richmond

## Psychological Safety: Areas to Target

Professor Amy Edmondson's research suggests that building psychological safety requires us to be proactive about creating and sending belonging cues to each other so that we feel safe, particularly in the moments that require vulnerability.

### These are five areas to target in your veterinary practice to improve psychological safety:

1. **Conquer Incivility** – Understand how everyday acts of incivility – like picking up your phone during a conversation to check your messages – can drain trust and damage relationships.
2. **Grow From Failure** – Embrace the required learning loop for high performance and the power of owning screw ups quickly and publicly, to build a growth mindset culture together.
3. **Get Honest** – Have kind conversations – even if they are uncomfortable or awkward - that support each other's learning and growth, rather than judging, blaming, or shaming each other. Remember: "Honesty without empathy is cruelty"
4. **Listen Appreciatively** – Give everyone a voice by creating safe spaces where people can discover what's working, dream of what's possible, design pathways forward and deploy the ideas and actions they truly care about.
5. **Be Generous** – Invest in a culture of generosity by encouraging people to be self-protective givers with strength-focused boundaries.

## Psychological Safety: Role of Leadership

Dr. Edmondson has found leaders play a particularly important role in enabling or killing psychological safety. The more a leader is thoughtful and deliberate in inviting input, having honest conversations quickly, owning their mistakes, sharing what they're learning as they grow and showing appreciation for people's questions and efforts, the higher their team's levels of psychological safety will be.

**Remember, we all share the same deep psychological need to be seen, respected and valued each day.**



# Moving the Team From Daily Suck to Sublime

Jen Quammen

**If you were to look with fresh eyes (think about taking a picture or video) what would you see in/about each of the following:**

## 1. Practice (Building, Grounds, etc.)

Good:

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Bad:

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Other:

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*What 1 or 2 Things Would You Change and Why?*



# Moving the Team From Daily Suck to Sublime

Jen Quammen

**If you were to look with fresh eyes (think about taking a picture or video) what would you see in/about each of the following:**

## 2. Clients

Good:

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Bad:

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Other:

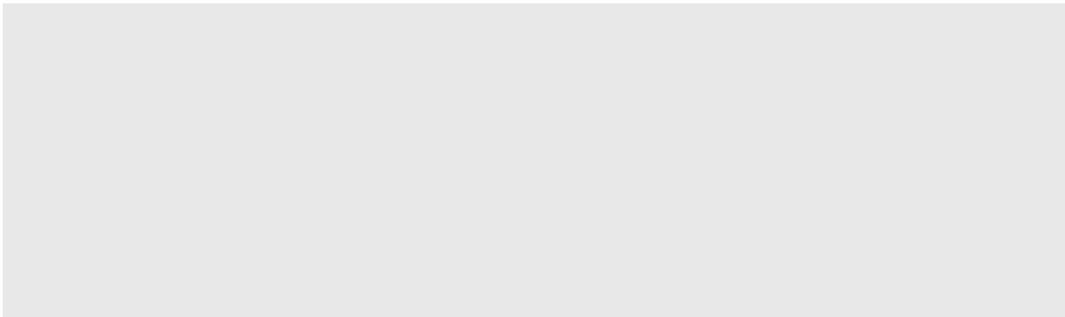
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*What 1 or 2 Things Would You Change and Why?*



# Moving the Team From Daily Suck to Sublime

Jen Quammen

**If you were to look with fresh eyes (think about taking a picture or video) what would you see in/about each of the following:**

### 3. Outpatient workflows (from scheduling/confirmation to day of activities and any follow up activities)

Good:

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Bad:

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Other:

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*What 1 or 2 Things Would You Change and Why?*

# Moving the Team From Daily Suck to Sublime

Jen Quammen

**If you were to look with fresh eyes (think about taking a picture or video) what would you see in/about each of the following:**

## 4. Surgery/Dental Workflow

Good:

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Bad:

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Other:

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*What 1 or 2 Things Would You Change and Why?*

# Moving the Team From Daily Suck to Sublime

Jen Quammen

**If you were to look with fresh eyes (think about taking a picture or video) what would you see in/about each of the following:**

## 5. Medication/Food Refills

Good:

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Bad:

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Other:

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*What 1 or 2 Things Would You Change and Why?*

# Moving the Team From Daily Suck to Sublime

Jen Quammen

**If you were to look with fresh eyes (think about taking a picture or video) what would you see in/about each of the following:**

## 6. Team

Good:

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Bad:

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Other:

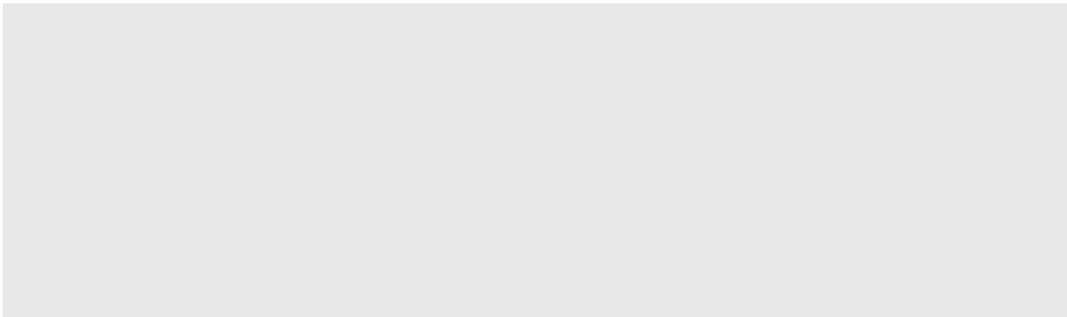
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*What 1 or 2 Things Would You Change and Why?*





# Servant Leadership is not Martyrdom

Michael Miller

## 5 Points of Servant Leadership:

- 1) Character - Initiative, Intention, Integrity, Humility, Ethical, Trust, Respect
- 2) Collaboration - Listening, Connection, Acceptance, Empathy, Persuasion, Feedback
- 3) Strategic Planning - Intuition, Foresight, Awareness, Conceptual Thinking, Step by Step
- 4) Benefiting Others - Healing, Community, Build People, Assisting, Share Power, Trustees
- 5) Self-Care - Withdrawal, Joy, Healing

## Workshop Walkthrough

Situation: \_\_\_\_\_  
\_\_\_\_\_

How can you approach this utilizing the first four points of Servant Leadership:

Character	
Collaboration	
Strategic Planning	
Benefiting Others	

How will you consider your own Self-Care:

What are you willing to sacrifice?	
How can you suffer less?	

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# Cut the Bullsh\*t: Streamlining and Systematizing the Client Experience

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Sarah Wolff

The client experience is more than customer service; the former encompasses all interactions between your customers and your brand (think social media, websites, email marketing, in-person interactions, and more), whereas the latter is solely your response to their concerns.

We can proactively design our client's experience cycle by considering their wants and needs, then creating systems to ensure we meet — or exceed — these in each interaction.

In order to predict your client's wants and needs, you'll need to consider the intersection of  
 1) your client avatars and  
 2) the veterinary client experience cycle.

**Client Avatars** – most practices will have 3-5 avatars or 'target clients' to whom they cater. This could be a whole workshop on its own, but for today's purposes, briefly consider yours:

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_

*Examples: Busy young professional, retiree with fixed income, working parent (yes, these are oversimplifications, but they will suffice for today!)*

---

## Veterinary Client Experience Cycle

We can break down the process of experiencing veterinary care into phases, each of which correlates to predictable wants and needs for our clients.

### The first 4 phases are unique to first-time clients:

- 1) New client evaluation
- 2) New client booking
- 3) First appointment
- 4) First appointment follow up

### The remaining phases are common to all established clients:

- 5) No man's land (between appointments)
- 6) Rebooking
- 7) Appointments
- 8) Follow up

# Cut the Bullsh\*t: Streamlining and Systematizing the Client Experience

Sarah Wolff

## Workshop

*For each phase of the client experience cycle, consider what your clients want and need (be sure to consider from the perspective of each avatar) and what your practice needs:*

- **New Client Evaluation**

Client Wants/Needs:

Practice Needs:

- **New Client Booking**

Client Wants/Needs:

Practice Needs:

- **First Appointment**

Client Wants/Needs:

Practice Needs:

- **First Appointment Follow-Up**

Client Wants/Needs:

Practice Needs:

# Cut the Bullsh\*t: Streamlining and Systematizing the Client Experience

Sarah Wolff

## Workshop

- **No Man's Land (Between Appointments)**

Client Wants/Needs:

Practice Needs:

- **Rebooking**

Client Wants/Needs:

Practice Needs:

- **Appointments**

Client Wants/Needs:

Practice Needs:

- **Follow Up**

Client Wants/Needs:

Practice Needs:



# Cut the Bullsh\*t: Streamlining and Systematizing the Client Experience

Sarah Wolff

## Streamlining

When considering what clients need and what the practice needs in each phase, we can simplify our workflow to eliminate unnecessary workload from critical team members. Options include:

- Eliminate
- Consolidate redundancy
- Reduce the number of humans involved
- Automate
- Batch Work

## Workshop

*For each phase of the client experience cycle, consider what your team currently does and what your clients currently experience, and identify areas with an opportunity for streamlining. (Don't worry if you don't get through them all – pick a couple to focus on today)*

- **New Client Evaluation**

Client Wants/Needs:

Practice Needs:

- **New Client Booking**

Client Wants/Needs:

Practice Needs:

- **First Appointment**

Client Wants/Needs:

Practice Needs:

# Cut the Bullsh\*t: Streamlining and Systematizing the Client Experience

Sarah Wolff

## Workshop

- **First Appointment Follow-Up**

Client Wants/Needs:

Practice Needs:

- **No Man's Land (Between Appointments)**

Client Wants/Needs:

Practice Needs:

- **Rebooking**

Client Wants/Needs:

Practice Needs:

- **Appointments**

Client Wants/Needs:

Practice Needs:

- **Follow Up**

Client Wants/Needs:

Practice Needs:

# Cut the Bullsh\*t: Streamlining and Systematizing the Client Experience

Sarah Wolff

## Systematizing

Once you've decided on areas where streamlining could benefit your team and/or your clients, it's time to redesign the processes involved! Hang in there. This part can feel scary, but it's really fun... I promise! It includes five steps:

- 1) Decide what you want to do for clients
- 2) Decide which role(s) on the team will be involved
- 3) Decide how the process will be triggered
- 4) Write an SOP
- 5) Train it, try it, evaluate it, tweak it

## Workshop

*Pick one phase and let's design a systematized process with a streamlined workflow:*

**Phase:** \_\_\_\_\_

Client Wants/Needs:

\_\_\_\_\_

What You'll Do for Clients:

\_\_\_\_\_

Which Role(s) Will Be Involved:

\_\_\_\_\_

What Will Trigger the Process:

\_\_\_\_\_

SOP Outline:

\_\_\_\_\_

\_\_\_\_\_

Plan to Train it:

Plan to Evaluate it:

### **Some books and podcasts to help get your creative juices flowing!**

- *Never Lose A Customer Again*, by Joey Coleman
- *Secret Service: Hidden Systems That Deliver Unforgettable Customer Service*, by John R. DiJulius
- *Business for Unicorns Podcast*, hosted by Michael Keeler

# CHOOSE YOUR OWN ADVENTURE

## Session 1

What's the problem you're here to tackle?

What are some ways you've tried to fix this problem?

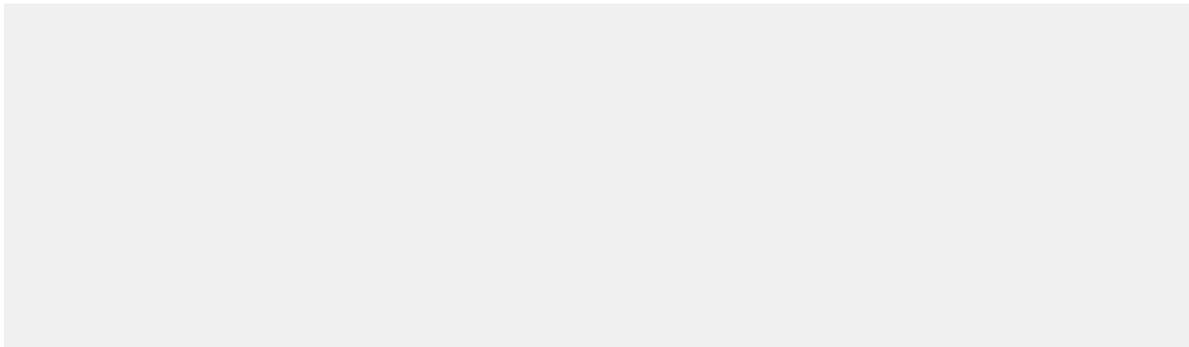
Keep Track of ideas from this discussion that can help you:

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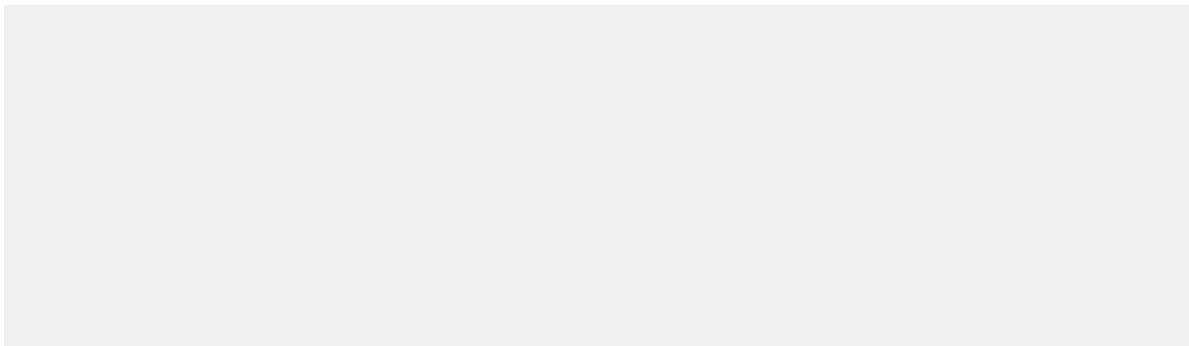
# CHOOSE YOUR OWN ADVENTURE

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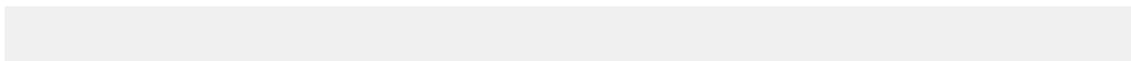
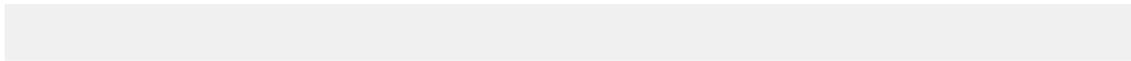
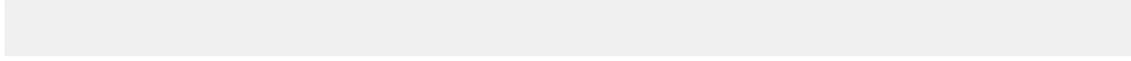
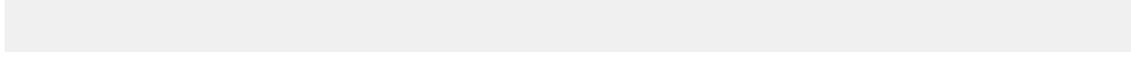
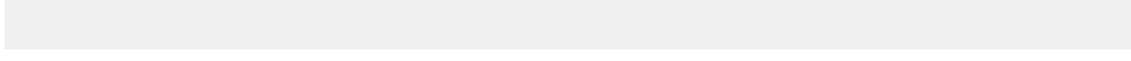
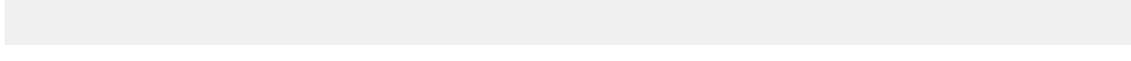
Refine your problem-solving options here in a short list:



What's the first way you're going to try to tackle the problem?



Write down names of the people in this group who can help you:

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# CHOOSE YOUR OWN ADVENTURE

## *Session 2*

What's the problem you're here to tackle?

What are some ways you've tried to fix this problem?

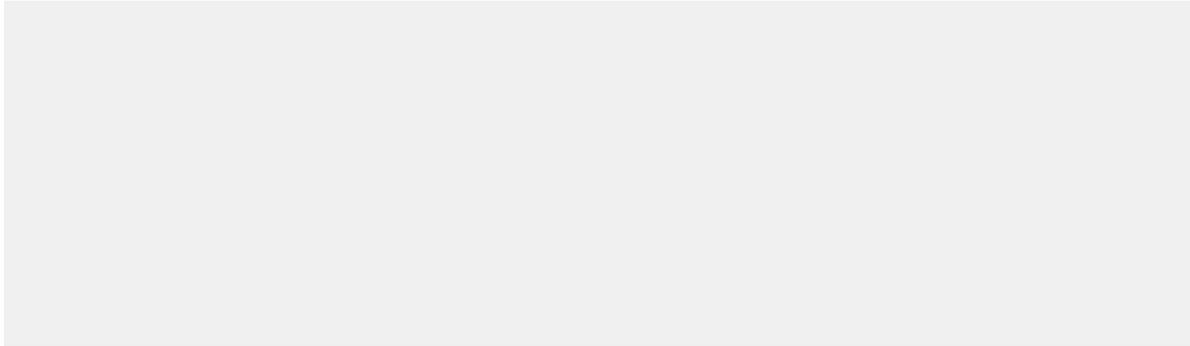
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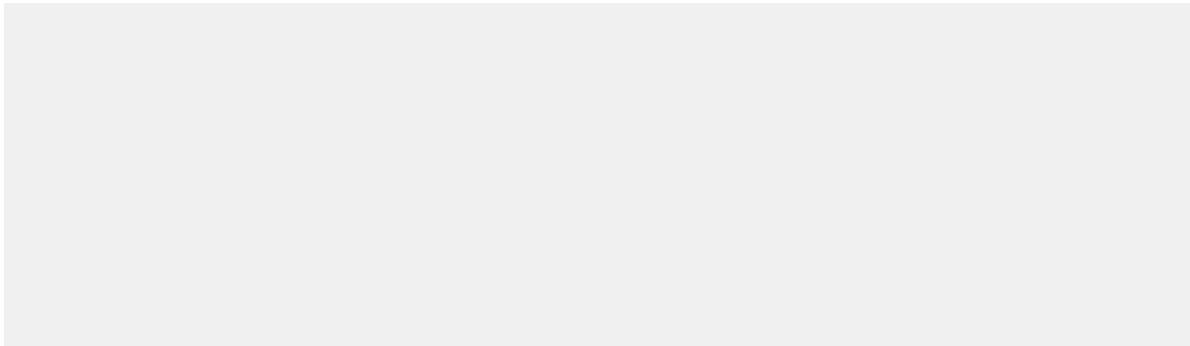
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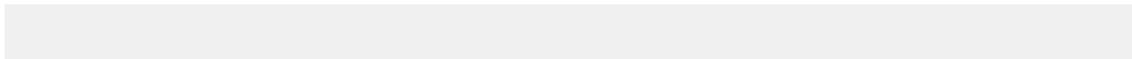
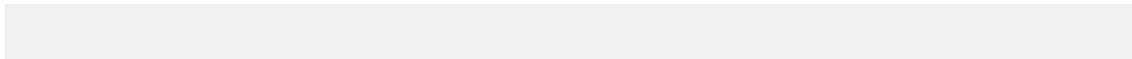
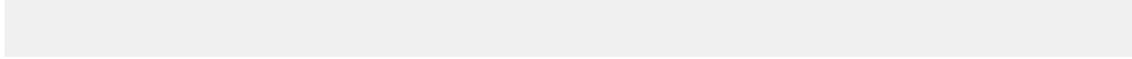
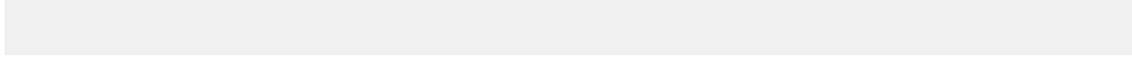
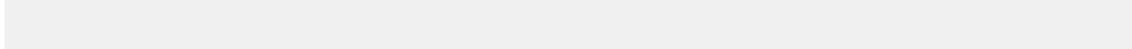
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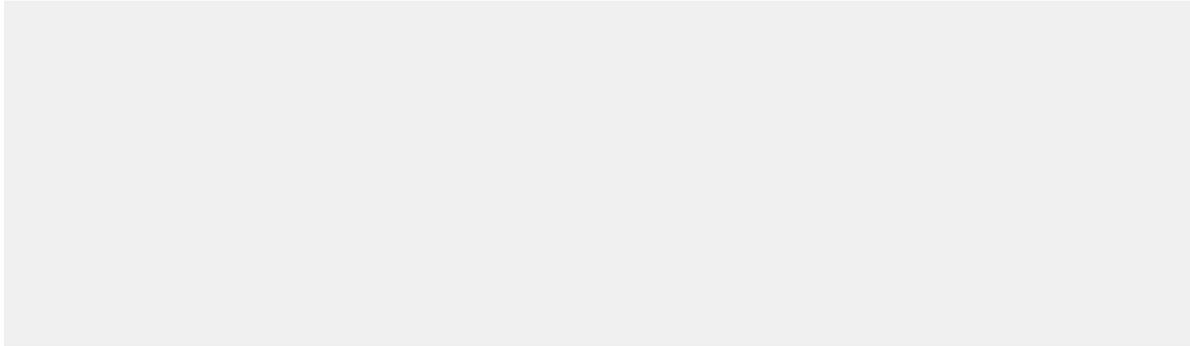
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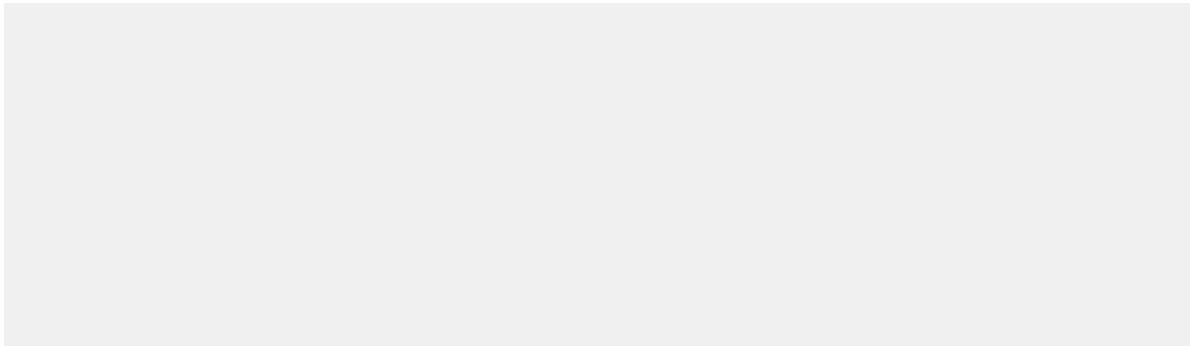
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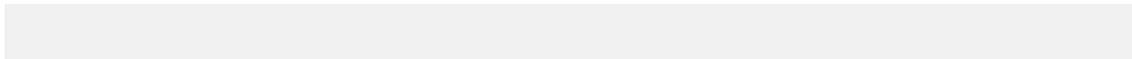
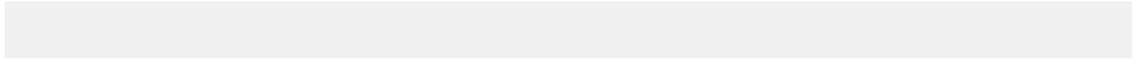
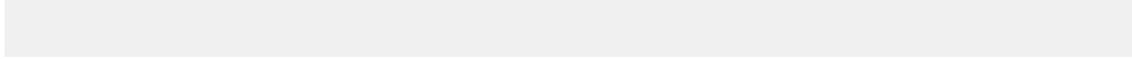
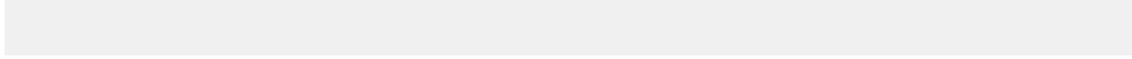
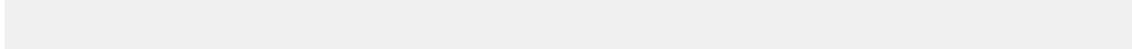
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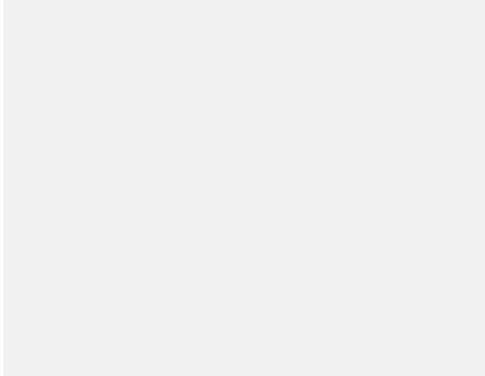


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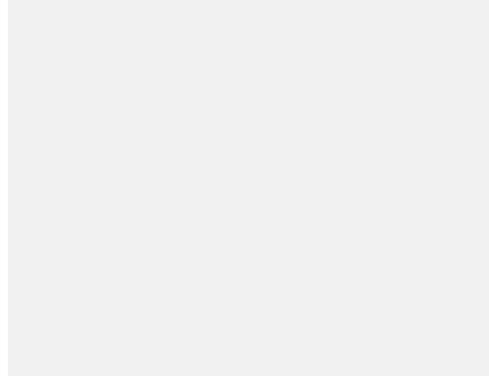
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# SMART GOAL SETTING

## 1) WHAT IS THE GOAL?



## 2) WHY IS THE GOAL IMPORTANT?



## 3) SMART GOAL CHECKLIST

**Specific**

Is the goal clearly written, with no ambivalence? Is it clear who needs to accomplish the goal and any support they might expect?

**Measurable**

Does the goal answer the questions of how many, how much and/or how often?

**Achievable**

Can you get the support needed to achieve the goal by the target date? Do you have all the resources needed to achieve the goal? Are the expected results realistic?

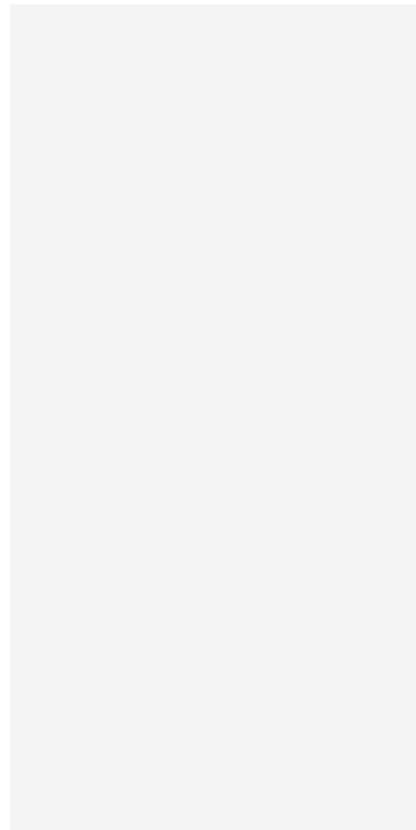
**Relevant**

Does the goal make a difference in your career? Will it make an improvement in your personal life? Is it going to make a significant difference in your business?

**Time-bound**

Does the goal state a clear and specific completion date?

## 4) LIST POTENTIAL ROADBLOCKS THAT MIGHT KEEP YOU FROM COMPLETING YOUR GOAL



# GOAL SETTING & ACCOUNTABILITY

## 5) ACTION ITEMS

- Action Item \_\_\_\_\_
- Who \_\_\_\_\_
- When \_\_\_\_\_

- Action Item \_\_\_\_\_
- Who \_\_\_\_\_
- When \_\_\_\_\_

- Action Item \_\_\_\_\_
- Who \_\_\_\_\_
- When \_\_\_\_\_

- Action Item \_\_\_\_\_
- Who \_\_\_\_\_
- When \_\_\_\_\_

- Action Item \_\_\_\_\_
- Who \_\_\_\_\_
- When \_\_\_\_\_

- Action Item \_\_\_\_\_
- Who \_\_\_\_\_
- When \_\_\_\_\_

6) COMPLETION DATE \_\_\_\_\_

# UNCHARTED *Homecoming*

## SOCIAL MEDIA SCAVENGER HUNT

It's time for the Uncharted Homecoming Social Media Scavenger Hunt!  
Are you ready?! GOOD! Here is how to play:

**Rule #1:** HAVE FUN! We want to show the world our Uncharted Spirit! So tell us what you love about this weekend. Every prompt is worth a point and extra points will be awarded for creativity! There are special themes this year for our Homecoming celebration and in true Uncharted fashion, there will be surprises along the way.

**FOUNDERS:** There will be prizes if we see you helping the new Class of Uncharted members on this adventure...

**Rule #2:** Share your photos on Instagram! We will count your posts on Instagram for points. This means the ones that stay on your grid, NOT in your stories! Stories disappear after 24 hours - we're all about making some lifelong social media memories. But wait! Don't think those Instagram stories and Facebook posts don't count for something. The more active you are on social, the BETTER!

**Rule #3:** Use the hashtag **#unchartedapril** AND tag **@unchartedvet**. This will help the Uncharted team find your posts in the sea of social media shenanigans that are going to ensue. Don't get lost out there - use that hashtag in everything you share!

Also make sure your profile is **PUBLIC** for this event.



**@unchartedvet**



**#unchartedapril**

# SOCIAL MEDIA SCAVENGER HUNT

## Only In Greenville

**HILL'S 5-POINT PROMPT:** Get a different view of Falls Park on Liberty Bridge!  
Snap a photo from this local landmark.

### 1 point

- Don't go chasin' waterfalls... or do! Take a photo at Reedy River Falls
- Do a yoga pose outside of The Lazy Goat
- Time for a close up! Take a close up photo of one of your favorite GVL destinations. Then, caption it with just emojis that best describe that place. If the @unchartedvet team guesses the answer, you get an extra point
- Have a snack or drink at CAMP and take a selfie in Greenville's most selfied bathroom - tag @campgvl and #offthegridgreenvilleflushies. Take a UVC friend for a bonus point! *\*Please don't just go to see the bathroom. We promise it's worth stopping by for a snack!*
- Greenville is an artist's dream! Find one of the many murals downtown and take a photo with it (Tag the artist for a bonus point!)
- Finish this Tim McGraw lyric with a photo outside of a local favorite restaurant - "Kisses sweeter than \_\_\_\_\_. Little bit crazy like New Orleans."

## Class of 2022

**NATIONWIDE 5-POINT PROMPT:** They've got your back! Take a photo with your accountabilibuddy!

### 1 point

- Take a photo with a NEW friend you've made at Uncharted Homecoming at the Night Out event!
- Find another UVCer on your travels? Take a photo together on your journey!
- How did your class choose their own adventure? Snap a photo in a CYOA session and tell us one pearl you took from it!
- Mic. Drops. Are. Back. Take a before and after picture of yourself when it's time for Mic Drops!

**KEEP GOING!**



@unchartedvet



#unchartedapril



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## Uncharted Spirit

**CARECREDIT 5-POINT PROMPT:** It's the Anchor Ball Opening Night - take a photo with your anchor swag!

### 1 point

- Come up with an Uncharted affirmation you'll remember Homecoming weekend by. Make it the caption of a photo of something you found beautiful here in Greenville.
- Caricature creations! Draw your own caricature of Andy and snap a photo! Don't forget to tag him
- Cheer on your speakers! Start a rousing round of applause before one of your workshop sessions and record it for the whole world to see!
- Thank a Sponsor! Grab a photo with one of our conference sponsors and thank them for helping us bring Uncharted Homecoming back to Greenville. Bonus point if you tag the company!

## No Place Like Homecoming

### 1 point

- Greenville may be home away from home, but what's something you brought on your trip that reminds you of where you live?
- Spot a fellow UVCer in the elevator? Take a photo together and tell us your favorite part of UVC Homecoming so far!
- It's time for the Homecoming Night Out Event! Snap a photo with your parade buddies and tag as many of your friends as you can on the way there.
- Say the words, "There's no place like home" to a UVC team member on the **last day** of UVC Homecoming for a surprise bonus prompt. PS - they'll only answer during breaks!



## Mascots

### 1 point

- Can you find all of the Mice on Main Street? 1 point for each mouse
  - His snout and tusks are made of bronze...
  - We hope you're having a whale of a time! Did you know there's a whale in downtown GVL? Find it and snap a photo!
-

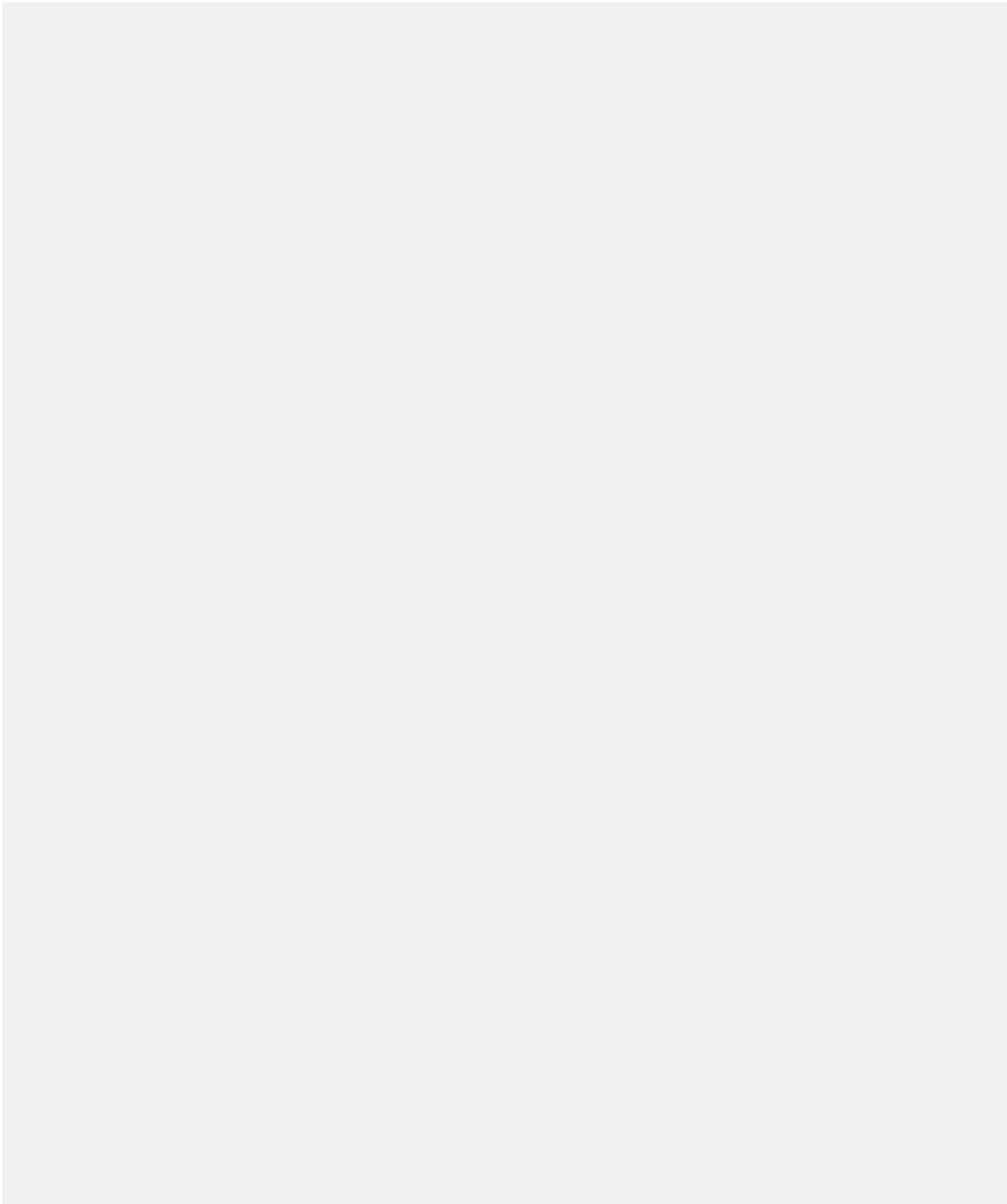




*Homecoming*

## YEARBOOK PAGE

*A space for your friends to share some words of encouragement, silly sentiments, or just the classic H.A.G.S.*



# UNCHARTED

## Homecoming

### SCHEDULE AT A GLANCE

#### THURSDAY, APRIL 21

6:00PM - 10:00PM

3:00 PM	Registration Opens	Westin Hotel Lobby
6:00 PM	Opening Ceremony	Poinsett Ballroom
7:00 PM	Dinner	Poinsett Ballroom
10:00 PM	End of Day	

#### FRIDAY, APRIL 22

7:30AM - 10:00PM

7:30 AM	Breakfast	Gold Ballroom
9:00 AM	Sessions Begin	Gold Ballroom
12:00 - 1:30 PM	Lunch	Gold Ballroom
1:30 PM	CYOA	TBA
4:00 PM	Mic Drops	Gold Ballroom
6:15 PM	Homecoming Night Out!	Cook's Station

#### SATURDAY, APRIL 23

7:30AM - 5:00PM

7:30 AM	Breakfast	Gold Ballroom
8:45 AM	GROUP PHOTO	Gold Ballroom
9:00 AM	Sessions Begin	Gold Ballroom
12:15 - 1:45 PM	Lunch	Poinsett Ballroom
1:45 PM	Afternoon Sessions	Gold Ballroom
5:00 PM	Tribe Goodbyes	Gold Ballroom

### ATTENDEE INFORMATION



#### THANK YOU TO OUR SPONSORS

