STAFF MEETING | QUICK-REFERENCE GUIDE

DIRECTIONS

Use this quick-reference guide to help you quickly refresh your knowledge of a staff meeting. More in-depth knowledge about this topic can be found in the **Meetings Course** lesson "**Staff Meetings**".

ESSENTIAL BASICS

WHAT IS THE PURPOSE?

To provide a time for the entire staff to regularly come together to get updated on important office matters, focus, plan, train and coordinate as a team.

WHEN SHOULD IT BE?

The staff meeting should occur at least once per month. It should be scheduled at a time that is least disruptive for the practice and when patients are not scheduled.

WHO SHOULD ATTEND?

All staff. Attendance is mandatory. It is run by the Doctor/owner or Office Manager or both.

MEETING INFORMATION:

Properly formatted, routine staff meetings are the key to office communication, training, and coordination. A regular format helps the staff know the general areas that will always be covered and give them predictability on what is going on.

The three basic areas that comprise a staff meeting format are:

- Staff briefings
- Production review
- Training

WHAT INFORMATION TO BRING?

What you will need will depend on the agenda for that meeting in each of the above three areas. Bring appropriate graphs, training materials, new policies, etc. Have enough handouts for every staff member.

TOPICS FOR DISCUSSION:

Staff briefings:

- Addressing anything appropriate from the previous meeting
- Going over any practice changes, news, upcoming events, points of interest, new staff introductions, upcoming marketing activities, future office plans, announcements, etc.

Production review:

- Determine which performance measurements (also known as Key Performance Indicators or KPIs) for the front and back office that you can discuss comfortably with all staff. This might include overall practice production, number of new patients, patient satisfaction levels, etc.
- Show graphs that clearly show the trends of these statistics, so everyone is aware of setbacks or improvements. Explain the actions that will fix or support the current situation and, as appropriate, who will be participating in those actions.
- Set production goals for the office for the next time period (usually monthly).

Training:

In your preparation for the meeting, you will have picked a training topic and put together associated materials. The training should rotate between administrative and clinical subjects. This might include training on implementing new office policies, software updates, new OSHA or HIPAA regulations, changes in relevant technical procedures, developments in the industry, new clinical materials, and technology, common confusions amongst staff, etc.

STAFF MEETING POLICIES AND GUIDELINES

- Staff meetings are mandatory.
- Designate a specific day and time that staff meeting will be held.
- The office manager or owner runs the staff meeting.
- All staff members should come to the meeting prepared to discuss their respective areas.
- All staff members are expected to participate in the meeting.
- Topics of serious, personal, or individual nature are not taken up at the staff meeting.
- Allow 45 minutes to an hour for the meeting.
- If the meeting is going to be during a lunch break, make sure that the employees bring their lunch, or arrange for their lunch to be there before the start of the meeting.
- Make sure you have records of each meeting.