

Look-ahead Meeting

Look-ahead meetings are front office management meetings conducted once per week for 20 minutes. The purpose of this meeting is to streamline the schedule on an ongoing basis and ensure proper communication and coordination between the front and back office teams.

This meeting is about the bigger picture, the ongoing approach to efficient scheduling, how and when the process is less efficient, and how to correct those inefficiencies. This meeting is not about individual patients, so it's important to avoid opening patient charts or talking about patient details.

Here are some tips for conducting look-ahead meetings:

- In the first meeting after introducing a new, approved meeting protocol, explain to the front office staff that the practice has implemented/rebooted the scheduling protocol many times, but it tends to fall out of consistent use. Emphasize that, instead, everyone should work together to adhere to the scheduling protocol. Also explain that this reboot of the scheduling protocol will include a training and monitoring system, so if the system begins to fail, the team will be able to see why and help get back on track. The team's input is valuable in uncovering repetitive problems and can be used in combination with data to further adjust the protocol. Note persistent/repetitive issues and consider either expanded training or adjusting the scheduling protocol to address these issues.
- In each meeting, look at the schedule one and two weeks out, day by day. Look specifically at the following details:
 - Where appointments already are and if anyone needs to be moved
 - Where there are empty slots that need to be scheduled and how the slot can be filled (e.g., using the short call list, etc.)
 - Where you can put the inevitable emergencies/short turnaround appointments that may come up
 - Which procedures are on the schedule that tend to run longer than scheduled. Ensure another long, complicated, or uncertain case is not scheduled right before or after those procedures.
- The second week may be less than full, but you can start planning and scheduling the week in advance.