

Management Meeting

The management meeting is held at regular intervals—usually after the end of the production week and before the general staff meeting—for the owner, office manager, and other supervisory staff. The meeting length may vary based on the agenda.

The purpose of the management meeting is to review KPIs, make determinations related to KPI trends, and devise subsequent short-term plans. This is also the time to consider and make policy or process changes, and coordinating management activities.

Here is some of the information that may be reviewed in the management meeting:

- Stats
 - Quarterly production, collections, and new patients
 - Quarterly number of active patients
 - Comparison with last year's numbers
- Goals
 - Current productivity
 - Desired growth/expansion
 - Additional specialty training
 - Additional products/services to offer
- Marketing
 - Marketing budget
 - Effectiveness of existing marketing efforts
 - New outreach activities to initiate
 - Allocation of staff and owner time for marketing activities
 - Review of next 12 months on marketing calendar
- Projects
 - Work being done with consultants
 - Job descriptions/office policy
 - Systems
 - Tracking
 - Other projects being done to grow the practice
- Rudimentary subjects
 - Licensing
 - Continuing education
 - Taxes
 - Legal matters
 - Building
 - Equipment
 - Insurance
 - Financial reserves
 - Security