

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:

1. Follow up on/report back on from last meeting
 - a.
 - b.
 - c.
 - d.
2. Stats
 - a. Weekly collections and new patients
 - b. Monthly collections and new patients
 - c. Review goal graph
 - d. Any other stats we want to review? (suggest number of implants placed)
 - e. Any other stats we want to start tracking? (suggest number of active referral sources)
3. Staff
 - a. Anyone leaving the team?
 - b. Any new employee needs and status on hiring?
 - c. Any training issues for all staff? How will this be addressed?
 - d. Any training issues for particular staff? Who will take care of this?
 - e. Any disciplinary issues? Who will take care of this?
 - f. Progress on putting job reviews in place.
 - g. Any stats/monitors needed for particular positions or individuals?
 - h. Update on restructuring and suggestions for delegating and reassigning tasks.
4. Finance
 - a. Determine marketing budget.
 - b. Any new purchases required?
 - c. Any equipment repair or maintenance required?
 - d. Determine the viability level of the practice.
 - e. Determine if bonuses will be given for extra productivity at levels beyond viability for the practice.
 - f. Any details to address regarding budget, accounting, reserves, taxes, supplies, vendors, etc?
5. Check into before next meeting

- a.
- b.
- c.
- d.