Practice Meeting List

Contents

Practice Meeting List

There are various meetings that every practice should have on a recurring basis. These meetings include the daily huddle, look-ahead meetings, management meetings, marketing meetings, owners meetings, and staff meetings.

Daily Huddle

The huddle is a quick meeting held once per patient day, either first thing in the morning or at the end of the day, to go over the next day's patients. This meeting gets everyone oriented and coordinated regarding the day's patients, appointments, and procedures.

Unexpected schedule changes, special circumstances, and any unique patient needs should be addressed at this time. The meeting should focus on coordination for getting extra procedures done, logjams in the day's flow, the anticipated need for assistance from team members, and the steps needed to enhance the experience or level of customer service for a particular patient. This meeting should not be used to discuss general practice business or to review every detail about every patient. Medical histories can be addressed by the back office staff, and insurance matters can be addressed by the front office staff.

Everyone scheduled to work should be in attendance.

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 teams 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.

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

Marketing Meeting

The marketing meeting has three segments:

- Statistical
- Administrative
- Plans

Statistical Segment

During the statistical segment, take a look at the marketing numbers you're tracking (e.g., new patients) and the numbers you want to start tracking (e.g., monthly number of active referral sources, monthly number of your visits to offices, monthly number of doctor contacts with other doctors, etc.).

Once the stats are in place and are kept up-to-date, it's just a matter of quickly reviewing the graphs and taking action based on the trends. It's important to reinforce actions that led to increases and immediately implement fixes needed for decreases.

Administrative Segment

During the administrative segment, take a look at the systems you need to implement, refine, and monitor to keep your marketing efforts organized and effective. This should include the file and/or report for tracking active offices, the offices you wish to activate, what contact has been made, what results have been achieved, the volume from individual offices, etc. It will take a few meetings to determine which data sets you need to gather and how you want to organize it. However, after that, it should just be a matter of reviewing the files to stimulate ideas and sequences of actions.

Plans Segment

The plans segment is mostly dictated by the marketing calendar. This is where all community and other events, campaigns (e.g., your visits to offices), doctor meetings, and anything other methods to ensure high-quality outreach is occurring routinely and is planned for the next 18 months. Also, if an event is upcoming, detailed plans for its execution would be discussed in this segment.

You will likely find that it is a good approach is to address the above areas first, then quickly go over any carry over subjects from the last meeting and determine what you'll commit to completing before the next meeting.

Owners' Meeting

The owner's meeting is intended for owners to discuss the same information and stats from the management meeting. This includes the stats, goals, marketing,
Project, and other rudimentary subject updates.

Staff Meeting

Properly run staff meetings are important for team building and maintaining team morale. It's important that staff meetings remain organized and that they are managed in a way that prevents them from becoming complaint sessions. Here are some tips for how to conduct a proper staff meeting:

Schedule

Staff meetings should be held every two weeks during a time that is least disruptive for the practice, with all staff in attendance. You may need to block out some treatment time or pay staff overtime to attend, but it is a small price to pay for ensure everyone is aligned. Staff meetings should last no more than one hour.

Prepare

Create and distribute an agenda well in advance of the meeting. After the meeting has been run a few times, staff can be invited to submit requests for matters to be added to the agenda, and management can prioritize those if/when appropriate.

Format

Staff meetings should briefly cover

- announcements and upcoming changes

- each department's recent month's productivity and projected productivity for the coming month
- training on practice matters as prioritized by management

Briefing

Quickly brief the staff on any practice changes, news, events, points of interest, announcements, etc. This will keep the team informed, which contributes to office morale and enhances efficiency.

Production

Choose measurements for the front and back office that you can discuss comfortably with all staff. This may include anything from patient satisfaction levels to productivity as measured in dollars. These measurements will help ensure that everyone is aware of setbacks or improvements and can participate in the actions that will fix or support the current situation.

Training

Pick a training topic in advance and either distribute training materials or briefly cover the topic in a lecture/workshop. It's a good idea to include a mix of clinical and administrative topics. Then, practice and discuss the timing and details of implementation so it is a well-coordinated effort.

Focus

It is common for issues to come up during a staff meeting. Perhaps team members have concerns about certain changes or implementation plans. It is vital to recognize that the staff meeting is a place to note such concerns, but it is not the time to attempt to solve the issue. Staff meetings often get derailed by focusing too heavily on these issues, which causes the meeting to exceed its scheduled time and causes unpleasant experiences. If an issue is brought up in a staff meeting, simply acknowledge the issue and state how it will be addressed (e.g., schedule a private meeting between the team member and their supervisor), schedule a separate training session for those who will be impacted by the issue at hand, etc.

Proper and routine staff meetings are the key to successful office training and coordination. It's worth the time it takes to develop and refine a workable format. Don't make the common mistake of deciding that the meetings are not working after only a few meetings and then abandoning them. With persistence, you'll implement an approach that provides the fastest way for you and your team to make improvements in the best interest of your patients.