



## Key Staff Management Tool: Productive Meetings

This is the last in a series of three articles that have focused on helping doctors better manage their employees. This issue of *Practice Management and Marketing News (PMM)* will discuss the power in the communication that can take place during three different team meetings—morning, monthly and department. **Clear and consistent communication is the ONLY TOOL a team has to improve how it works together!** Do not miss this great opportunity to make your team the best it can be. Good employee management is creating the format for structured and well planned meetings where effective communication takes place, resulting in increased productivity and reduced stress. Through productive meetings, everyone stays informed. If a team is not a cohesive force moving in the same direction, then there will be many individual agendas competing against each other and productivity will be greatly reduced and stress and confusion increased.

One cannot successfully run a business and/or manage employees if one does not take time to discuss the status of the business with employees. For instance, discuss what is working, what is not working and brainstorm solutions. A doctor can think of himself as the Chief Executive Officer (CEO) and his employees as his “board of directors,” designed to help him run a profitable practice. The CEO and board of directors should meet regularly to discuss the status of the practice vital signs and systems that are most important for its success. Depending upon the size of the staff, everyone may be on the board or, if there is a very large staff, then the board would consist of a few key employees who manage the different departments/systems. The remaining employees would be the shareholders who also have a financial interest in the practice being profitable. All should be present at the company’s board meeting to be informed on how the business is doing and what they can do to help make the practice a success.

Meetings should take place in the office and not in a restaurant over lunch. It is more difficult to discuss confidential practice information (production and collection status) and/or address staff issues in a public atmosphere. It is great to go out to lunch as a team, but it is best to do so just for fun and enjoy the camaraderie.

### Types of Meetings

- **Morning Huddles** done well set the tone and level of productivity for the rest of the day. They help the team focus on how to create production opportunities and get through the day’s schedule smoothly. When team members come to the morning huddle prepared with the appropriate information to be shared and a set agenda is followed, this meeting can be completed in less than 15 minutes. Suggested agenda:
  - **Positive greeting:** do not allow negativity to be present; it is an energy drain.
  - **Are the daily producer (Dr. and hygienist/recall) production goals met today?** If not, where are the opportunities to “Mine the Gold?” “Mining the Gold” means finding procedures that can be done that day outside the original schedule. Examples include:
    - a child has come in for a recall appointment and needs a filling, sealants or a panorex;
    - emergency patient that needs treatment.
  - **Are the daily producer production goals met over the next three days?** What openings need to be filled?
  - **Cancellations? How will we fill that time?** Messages are checked before the morning meeting.
  - **Identify the best times for emergency patients.** A front desk staff member should



never have to leave their desk and go to the back to ask this question.

- **Financial arrangements completed?**
- **New patients:** Name, chief concern, referral source.
- **Treatment diagnosed and not scheduled?**
- **Family members that can be referred?**  
Do a lap exam on a younger sibling that has accompanied the recall patient, or make an appointment for that sibling during the next recall appointment of the older child.
- **V.I.P. assignments:** Share information about a child that is coming in that day that we want to acknowledge or be sensitive about.
- **End on a positive note:** Inspirational quote of the day, joke of the day, and word of the day helps to create motivation and energy.
- **Monthly Team Meetings** provide the place for the practice board of directors to give their status reports on the practice vital signs and systems they oversee. Also, they create the forum for the team to discuss what is working well, what is not working well and problem solve for the appropriate solution to create better work pathways with each other.
  - Should be held at least once a month in the first or second week.
  - The minimum of 1.5 hours should be set aside. If the schedule happens to run over in the morning, there will be at least one hour for the meeting.
  - One day prior to the meeting, the doctor and office manager **review the Team Meeting Discussion Items form and create an agenda** to assure a well planned and productive format.
  - Appoint a team member to be in charge of filling out the **Action Plan Form**. This form captures the new tasks to be completed, who should be assigned to each task and notes the completion date. The Action Plan Form is posted on the cork board in the staff lounge and becomes an accountability tool for the doctor to make sure all decisions made at the meeting are carried out.
  - Suggested Agenda:
    - **Review Action Plan** from previous meeting. Report progress and/or completion of projects.
    - **Practice systems reporting.**
- **Production:** monthly total vs. goal, year-to-date (YTD) production vs. goal, daily producer average (Dr. and hygienist/recall) vs. daily producer goal.
- **Scheduling:** blocking, cancellations, no-shows, and next openings.

- **Collections:** YTD collections vs. goal, collection ratio, adjustments.
- **Recall.**
- **Unfinished treatment plans.**
- **New Patients:** monthly total vs. goal, YTD vs. goal, referral sources.
- **Marketing:** customer service, asking for referrals, outside marketing efforts, thanking referral sources.
- **Ordering supplies.**
- **Occupational Safety and Health Administration (OSHA) Regulations.**
- **Equipment maintenance.**
- **Facility issues including:**
  - **New projects.**
  - **Patient management issues.**
  - **Job duties.**
  - **Office schedule update.**
  - **Continuing Education (CE): doctor teaches staff about dentistry.**
  - **Each staff member shares concerns or appreciation.**
- **Quarterly Department Meetings.** Unlike the monthly team meetings that focus on the bigger picture of practice vital signs, department interactions and CE, department meetings are more system specific to the individual department.
  - There can be up to four departments in a pediatric dental office: front desk, assistants, hygiene/recall and management (if there is an office manager and/or more than one doctor).
  - Each department meets quarterly with the doctor to discuss and problem solve specific department issues concerning job duties and system changes for improved performance.

## Types of Meetings

Below are tools that will help facilitate communication within a dental team:

- **Twelve Months Laminated Wall Calendar:** Place this in the staff lounge where everyone can easily view upcoming events. The write-on/wipe-off surface can be adjusted as needed. Items that should be marked on the calendar include:
  - Monthly team meetings.
  - Department meetings.
  - CE courses.
  - Staff vacations (so others will know when a team member will be gone).
  - Birthdays.
  - Office closure.
- **Cork Board:** Place this in the staff lounge for:
  - Announcements.
  - Action Plan Forms.



- Invitations.
- Team Meeting Discussion Items Form.
- **Forms:**
  - Meeting Agenda.
  - Action Plan.
  - Team Meeting Discussion Items.
- **Large Pad of Paper, Easel & Markers:** great tool for reporting numbers and listing challenges, solutions, ideas at meetings. This way, all team members can see visuals and understand concepts.
- **Individual Spiral Notebooks:** team members can take notes for future reference.
- **Koosh Ball:** toss the Koosh Ball around to all team members when feedback and interaction is desired. The one holding the Koosh Ball has to share their idea or thoughts, then must toss it to the next team member to speak.

## Meeting Killers

There are certain behaviors that should not be allowed during team meetings because they will quickly reduce the effectiveness of the meetings. Below are examples that are best to avoid during meetings because they are a waste of the doctor's resources

and the board of directors' time:

- Conversation veers off the topic and the meeting becomes a social session.
- Not all key people are present.
- An agenda is missing or board members choose not to stick to the agenda.
- Turns into a gripe session instead of solving the problem. **DO NOT LET THIS HAPPEN!** This is destructive. When you can see this starting, stop the discussion and follow the "problem solving formula":
  1. **WHAT is the problem?** Identify and define the exact problem you would like to solve.
  2. **What are the CAUSES?** Brainstorm all causes. Do not discuss the problem.
  3. **Possible SOLUTIONS?**
  4. **What is the BEST SOLUTION?**

Holding morning, monthly and department meetings on a regular basis, as described within this article, is preventive team maintenance, thus, good employee management. Consider meetings as a training exercise, like lifting weights, that keep the team strong, fit and able to win the Olympic Gold Medal in the sport of pediatric dentistry!

*"The way a team plays as a whole determines its success. You may have the greatest bunch of individual stars in the world, but if they don't play together, the club won't be worth a dime."*

~ Babe Ruth

## Manage Employees Easier!

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