Structuring dynamic meetings

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Take your practice to the next level of success by working on the practice, not just in it. If you no longer have staff meetings because of complaints (“We’re too busy,” “Nothing was ever prepared,” or “The meetings were just gripe sessions.”), see what a little structure can do.

Meetings are the most efficient way of making sure that everyone is on the same page. Productive meetings can be used to resolve issues, implement new ideas, minimize gossip, encourage staff to take a more proactive role in the business, engender buy-in for practice values and, generally, make coming to work each day more enjoyable.

There are five meeting types — morning huddles, evening huddles, goals and budget reporting, training and business development. Because everyone is responsible for practice success, everyone should attend all meetings to understand where the practice is headed and areas that may need improvement.

Each meeting must have a facilitator and someone who takes notes. Facilitators develop meeting agendas and run meetings. One week prior to meetings, facilitators should type agendas based on topics the staff and orthodontists submit. During meetings, note takers document major ideas and decisions on flip charts so everyone can agree to the outcomes.

Daily morning huddles
Convene morning huddles 10 to 15 minutes prior to the start of business. Have each staff member report on assigned items related to that day’s activities, e.g., delinquencies, cases overtime in treatment, difficult patients, medical alerts, starts and consultations scheduled, scheduling availability and lab appliances due. Having everyone report on an item keeps staff members interested.

Daily evening huddles
Convene evening huddles immediately after patients leave. Reflect on the day’s challenges and achievements. Cover charting, new patient starts, relieved delinquencies, number of care calls that need to be made, how problem patients were handled, daily production and collection activity, etc.

Twice-monthly training meetings
Hold separate training meetings twice monthly for front office and clinical staff. The front desk should review patient service policies, proper phone protocol, return call timeliness, ways of managing difficult parents and scheduling, etc. The back office should continually review proper impression taking, radiography, photography, and bonding techniques and wire sequencing, etc.

Monthly goals and budget meetings
Hold this meeting for roughly two hours during the first week of each month. The first part is for information sharing: the previous month’s success versus goals and the current month’s goals, including departmental budgets, collections, production, case acceptance, new patient starts, referral sources, etc. Transition the meeting to idea-generating to address challenges. Deliver bonuses and awards during this meeting.

Quarterly business development meetings
Business development meetings should cover all major issues. Hold them quarterly and use their outcomes as the game plan for continued achievement. Topics should cover marketing, patient service, new equipment, team-building, remodeling, systems implementation, consulting services needed, fees and upcoming conferences.

Conclusion
Keeping everyone in the practice apprised of how the business is doing is the best way to ensure continued practice viability. Involving staff in problem solving puts everyone’s experience to use and helps create loyalty and dedication.

To learn more about how to structure meetings or implement effective practice systems, attend Orthodontic Management Solutions workshop Nov. 7-8 in San Diego. Visit www.orthoconsulting.com for more information and to register.

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