

FRONT OFFICE *Rocks*®

The Leader in Dental Front Office Solutions & Training

Meeting Policy

Production in a dental office is important but if the office only focuses on production then eventually the office will start to become disorganized and result in decreased production. The reason for the decreased production is no time allotted for meetings and times to get more organized or to get organization addressed. Therefore, it is vital that regular meetings are scheduled and held throughout the month and the year. This policy contains a suggested list of meeting that should happen along with the purpose of the meeting and the suggested increments.

DAILY

Morning Huddle - *every day* - this meeting is to focus on the day ahead, discuss the patient's scheduled as well as what everyone's part will be in making the day run smoothly and any goals the team is trying to accomplish with that day.

- *No need to set meeting time in schedule - should be done everyday minimally 20 min before the first patient of the day. Suggested time is 20 minutes minimum but 30 minutes preferred.*

WEEKLY

Executive Meeting - *weekly* - the attendees of this meeting are the owner, the office manager and any other key decision makers of the practice. The weekly statistics are reviewed during this meeting as well as discussion and decisions of how to either improve the next week or if things are going well, how to keep them going well.

- *Needs to be scheduled the same day and time each week so everyone knows not to move it or schedule a patient in the doctor's schedule during that time. It is best if the meeting happens off site or at a location that no one gets interrupted. This meeting should be put in the schedule for long term future and everyone needs to know to not move the meeting and the meeting happens even if one member cannot make it (ie they are on vacation a certain week, etc..) Suggested time is same time every week for an hour minimally.*

Treatment Plan Meeting - *weekly* - this is a meeting with the each doctor and the doctor's treatment plan coordinator. This meeting is designed to review each consultation for the week, the status of the patient, and the update on any other outstanding treatment plans. The focus of this meeting is to update the doctor on the patient's status as well as help the treatment plan coordinator with any assistance the doctor might be able to offer

- *Needs to be scheduled into the schedule each week to make sure that it happens. Each doctor should have their own meeting with the treatment plan coordinator so for offices with multiple doctors, the best is to assign a day of the week meeting for each doctor so they know when it is. Once the meeting is completed, move the block in the schedule from that day to same day of the week the next week for the next meeting. Suggested amount of time is 1/2 hour anytime that works in the doctor's schedule.*

MONTHLY

Staff Meeting - *monthly minimally* - this is the all hands meeting where the entire team is brought together to discuss issues that have arisen over the month, review the goals, update staff on new policies, train on issues that need to be addressed, etc.

- *This meeting needs to be scheduled well in advance with the best being blocked in the schedule for the the entire year ahead considering it is harder to move patients once they are booked than it is to block the schedule before a patients is appointed there.*

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This meeting is mandatory if an employee is in town and needs to happen no matter if some staff need to miss the meeting or not. Suggested amount of time is 2-3 hours either at the beginning or end of day.

Department Meetings - *monthly minimally* - these meetings are for each department (ie.. dental assistants, hygiene, front office, doctors). These meetings are a set time once a month to discuss issues for their specific area, make sure that everyone is on the same page as well as train on areas that might need to be improved or need to be corrected.

- *This meeting should be blocked in the appropriate department's schedule in advance for the same reason staff meetings are scheduled in advance. For some offices it might make sense to try to do all of them at the same time so that there are no patients during that time and no interruptions. This meeting should be scheduled long enough so that it can be productive but does not need to be as long as a staff meeting, for example. Suggested amount of time is 1 hour possibly over lunch.*

Financial Meetings - *monthly* - this meeting is attended by owner and decision makers to review the finances of the dental office, discuss where monies are spent, where money can be saved and make financial decisions of purchase. Any requests for large purchases should be requested on paper to owner prior to this meeting so that it can be reviewed and a decision can be made on the purchase.

- *This meeting more than likely needs to take place outside of production hours or if it is during production time, it should be at a time that those involved will not be interrupted. It is best if this meeting is held where the attendees have access to management software, copies of bills, etc.. so that if more data is needed it is easily accessible. Suggested amount of time is 1 hour.*

ANNUALLY

Yearly Planning Meeting - *annually* - this meeting is the time where the doctor and the executive team can present the team how the practice has been doing and what the goals are for the next year along with ideas of how the office can accomplish those goals.

- *This meeting can be anything from a few hours to a few days (many offices like to turn this meeting into an excursion) but time should be set aside no matter what to discuss goals, etc...*

AS NEEDED

Of course other meetings can be added in as needed and should be. Make sure to prioritize getting and keeping everyone on the same page and there is no better way than taking a few minutes out of our busy day to meet and handle whatever issues arise.

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