Prepare or Perish

Monthly meetings must have an agenda that includes standard items the practice is continuously monitoring. Without one, you and your team are left to wonder aimlessly, which is incredibly frustrating for everyone, not to mention totally inefficient. Specifically you want to discuss all areas affecting the profitability/success of the practice. For example, numbers of new patients scheduled for the month, the number of new patients actually seen, the number of emergency patients scheduled for the month, and the number of emergency patients treated for the month. Additionally, the number of patients with unscheduled treatment.

Now that everyone knows the numbers, the group can discuss if the practice is on track with its scheduling goals. Are there specific system barriers that are preventing individuals from achieving those goals? Use the collective problem-solving skills of the team to identify solutions to those barriers and help identify solutions to problems that may be occurring in the scheduling system.

Welcome Opinions, Views & Disagreements

Seek input from everyone, and don’t be afraid of conflicting views. In fact, encourage it. When individual members of the team raise concerns, problems and issues, whether they are large or small, express your appreciation for the input and for the members of the team who brought those concerns to the group’s attention. You can often learn important lessons from these disagreements.

When putting the final meeting agenda together, list the most critical items at the top of the list to ensure there is adequate time to talk about them. Determine how much time you will spend discussing each matter, avoid getting bogged down on unrelated topics, and insist that team members come prepared to discuss the items listed.

Lead the Way

As the facilitator—other than the doctor—to guide the group in the discussion. Talk about only what is on the agenda. First, cover the key systems. Each month the individual team members report on the status of their specific areas.

For example, the scheduling coordinator would report on key indicators within the scheduling system, including:

- The number of new patients scheduled for the month.
- The number of new patients actually seen.
- The number of emergency patients scheduled for the month.
- The number of emergency patients treated for the month.
- The number of patients with unscheduled treatment.

Though consensus is good to strive for, it’s not always possible. Ultimately, the team needs to make explicit that while individuals may have disagreements during the discussion, everyone supports the final decision, which is made by the doctor.

To encourage discussion, the facilitator should ask questions such as, “How do you feel about this? What is your reaction to that? As the patient, how would you react?” What are the advantages of this approach? What are the potential disadvantages? Team participation is essential to the success of not only the meeting but also in implementing recommendations that may result from discussions during the meeting.

Develop the Plan of Action

Delegate responsibility and establish deadlines for completing tasks identified during meetings. For example, if hygiene cancellations are high and the team has developed a plan to reduce the cancellations, the person responsible—probably the hygiene coordinator—needs to know she is accountable for implementing the changes and should be responsible for the effects of those changes at the next meeting.

Once the systems are reported on, the remaining time can be used to cover other items on the agenda, including staff training and education. For example, if members of the team attended a continuing education program, they should be expected to share the team highlights from the program and specific techniques or strategies that they believe can be implemented in the practice.

If the office is offering a new service or product, the staff meeting is an excellent venue to introduce the team on the new item, answer any questions and ensure that every employee is prepared to answer questions from patients. If the doctor is offering a new treatment, such as implants, he/she should schedule time during the meeting to educate the entire team about the procedure. The group can discuss how to market the procedure, how to effectively discuss it with patients, how to handle questions about it, where they can acquire additional information, etc.

Teams also can use the time to address particular challenges, such as collections or effectively explaining the financial policy to patients throughout the day. In addition, journal articles on numerous practice issues can be shared and discussed during the meetings.

Consider the Environment

If possible, the two-hour monthly staff meetings should be held off-site in a conference room with a conference table, and eliminate outside interruptions. Seek consensus from the staff as to the best time to hold staff meetings, and remember that meetings scheduled outside normal work hours should be paid.

Evaluate the quality of your monthly business meeting by answering the following questions.

- Were the discussion topics known prior to the meeting?
- Did co-workers have an opportunity to contribute to the meeting?
- Was the meeting environment comfortable?
- Did the meeting start and finish on time?
- Did everyone have a voice in the discussion?
- Were minutes distributed after the meeting to document what was discussed?
- Were recommended actions completed?
- Were there ideas for completion?
- Were the meeting topics significant?