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10 REASONS TO HAVE A MORNING MEETING

Treatment coordinator consultant Laura Horton kickstarts the day with focus and purpose

1: TEAM BONDING BEFORE THE DAY BEGINS

How often have you said to your nurse towards the end of the working day: 'I haven't seen Michelle today'? How often have you thought this? A friend of mine has worked in a practice for many years and recently the principal came up to her and said: 'Excuse me, what's your name?' After eight years of working for him she is now looking for another job. Team bonding is of vital importance if you want to have a successful practice. Giving yourself the opportunity to get to know your team and to make them feel special is important.

2: THE DAY BEGINS ON A POSITIVE NOTE

This meeting is not about delegating duties; it is about the outcome from the previous day, discussion about the day ahead and confirmation of other key performance indicators that are relevant to your practice. If any of the team need to discuss anything with each other which is not relevant to the meeting, they must do so after the meeting has finished. The end of the meeting is then an opportunity for the practice leader to end on a positive note, eg: 'Yesterday was a great day; you all worked very hard, the patients were happy and the day ran smoothly, so well done to you all.'

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3: EVERYONE IS AWARE OF WHAT IS HAPPENING IN EACH DIARY

There often comes a time where one assistant may need to cover for another. This can be arranged in the meeting rather than at the last minute. The hygienist may need help with a pocket chart or local anaesthetic, so this can be arranged in advance.

4: INCREASES PRODUCTION

Confirmation of payments due to be collected, deposits to be taken and credit applications to be followed up or organised ensure that your day is much more productive. If for some reason appointments run behind, the front desk will still be aware of their responsibilities for the day.

5: HELPS TO FILL GAPS

Gaps for the following three working days should always be confirmed, as well as patients who may be available to take those spots. This is where delegation will occur as you will confirm who is going to fill each gap. For example, a dentist may fill the hygiene gap tomorrow with a new patient that is coming in today.

6: FOLLOW-UPS WITH PATIENTS CAN BE CONFIRMED

How often are you left wondering if Mr Smith or Mrs Jones booked her treatment plan that you prescribed? Following up with your patients is key to your success. Having treatment plans sitting in your computer software is not good for your patients' mouths or your diary. Each day, in a morning meeting, you can confirm with the team exactly what

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the individual outcomes have been for the patients who have not gone ahead with their plans. An example would be: 'Yesterday we followed up on Mrs Smith and Mr Patel. Mrs Smith has booked her treatment and Mr Patel is waiting to get paid before booking'. This way everybody is 'in the loop' and knows what is happening.

7: PREVIOUS OR LIKELY FTAS CAN BE IDENTIFIED

The same situation applies for failed to attends (FTAs). What happens to them in your practice? Have they been contacted? It is important to contact all patients that fail to attend their appointment by telephone and confirm they are OK. Make sure that patients rebook their failed appointment as this can have an effect on your appointment book.

You can also spot any patients that are the 'offenders' in your practice. We all know who they are and every practice has them. If you do this in the morning you can ensure that a team member will call the patient there and then to confirm - even if they have been confirmed the day before!

8: TROUBLESOME PATIENTS CAN BE HANDLED

Again, every practice has them: the patient that you see on the list whose name immediately drains your energy! When you have a patient like this in your diary you can decide as a team how best to handle them. Must they be seen on time? Do not keep them waiting as they will cause a scene? Can you book all appointments and take a payment in the treatment room to keep them away from other patients? Can you get them to wait away from other patients in a spare treatment room? If you work as a team with the aim of delighting this patient, your day can become a happier one.

9: NERVOUS PATIENTS ARE KNOWN TO ALL

Nervous patients can be your biggest fans, your biggest referral source. It is very important that the entire team know which patients are anxious and what the reason for the anxiety is. As a team you can all work together to make the patient comfortable, be friendly and have a conversation that distracts them from their appointment and ensure you see them on time so they are not waiting and worrying.

10: FINANCIAL INFORMATION CAN BE SHARED

Many practices now have bonus schemes and it is important that the team know the goal they are working toward. It is a good idea if the team knows on a daily basis how close they are to achieving that goal.

Other key information that needs to be shared relates to patients' treatment plans. Have big cases gone ahead? Have debtors paid? It is best to decide what information is important to your practice and your team and how you can share this. You do not want to share lots of information or information that is not relevant - focus on a key performance indicator.

Have you any tips on making your practice meetings more effective?
Write to us: comments@ppdentistry.com

Laura Horton provides consultancy services and training for dental practices

5 WAYS TO MAKE YOUR MORNING MEETING MORE PRODUCTIVE

1: Have one person lead the meeting every day
This should be a full time member of the team who is there every day; they will be called the morning meeting coordinator (MMC). I do not recommend that a dentist run this meeting as he or she will take over. The person who does this must be able to stay in control and have some leadership skills. Or it may be someone that you want to encourage to become more of a leader, so handing over this task will help that person to develop new skills. The MMC should be the employee doing 80% of the talking and instructing each person from the team on when to contribute. I prefer a member of the front desk team to lead the meeting.

2: Confirm an agenda
For someone to stay in control and for the meeting to avoid running into unnecessary aspects of the practice, you need to have an agenda and it needs to be adhered to. This is why you need one person running the meeting each day to maintain full control.

3: Create a form that is completed for each morning meeting
The form itself comes from the agenda. This needs to be completed each day and prepared by the MMC as their last task of the previous day. The form can then be filed for future reference. The MMC will read from this form each day.

4: Make sure everyone is set up and ready before the meeting starts
The entire team must be ready for 'Showtime' as soon as the meeting has finished. Treatment rooms must be fully set up, rooms decontaminated as well as the front desk. As soon as you walk out of the room where the meeting is held, the day really begins. People should not eat their breakfast in the meeting, though tea or coffee is fine. Nor is it acceptable if this is held in the treatment room, for the nurse who works in there needs to set up. Everyone's focus must be on the MMC, not on computer screens or themselves.

5: Everyone to have a print out of all other diaries for that day
It can increase production, communication and awareness as a team if you can all see as well as hear what is happening in each others' book for the day. Team members can make important notes on the print outs during the meeting. Doing this also ensures that everyone's focus is again on the person talking rather than a computer screen that maybe not everybody can see. It is as important for each nurse to read out their diary for the day as it is for the hygienist to read out theirs.