



OPTIMIZING TEAM MEETINGS

AGENDA GUIDLINES

CONTENT:

Strategies to optimize team meetings for improved collaboration and productivity.
Tools to transform your dental practice meetings into a success driver.

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MEETING STRATEGIES

Attendees: All-Team

- 1. CELEBRATE** Previous days successes, discuss the lows

- 2. PATIENT UPDATES** Schedule changes, cancellations, new patients

- 3. REVIEW TREATMENTS** Ensures that everyone is aware of the procedures, materials needed, and any special considerations.

- 4. TEAM ASSIGNMENTS** Based on the schedule and patient needs. This helps to ensure a smooth flow of operations and optimal patient care.

- 5. FILL PRODUCTION HOLES** Identify patients in the schedule that need treatment. Call patients with unscheduled treatment.

- 6.. FINANCES** Review production goals for the day.

- 7.. PATIENT EXPERIENCE** Discuss patient feedback or suggestions to identify areas for improvement in the patient's experience.

- 8.. OPEN COMMUNICATION** Raise any concerns, ask questions, or seek clarification on any issues.

MONTHLY DEPARTMENT MEETINGS

DEPARTMENT MEETING TOPICS

1. DOCTORS

Clinical Case Discussions
CE Opportunities
Treatment Planning Strategy Updates
Referrals
Quality Assurance / Risk Management
Team / Practice Improvement

2. ADMINISTRATION

Financial Updates
Administrative Policies
Patient Feedback
Human Resources
Technology Updates
Marketing
Interdepartmental Collaboration

3. DENTAL HYGIENIST

Patient Care Protocols
CE Opportunities
Case Presentation Success
Equipment / Supplies
Patient Feedback
Interdepartmental Collaboration

4. DENTAL ASSISTANT

Equipment maintenance / Sterilization
Inventory management
Patient scheduling and coordination
Training / Professional development
Interdepartmental Collaboration
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ALL-TEAM MEETING CATEGORIES

- 1. FUTURE PLANS/GOALS** Includes: setting targets, defining key performance indicators (KPIs), and establishing timelines for upcoming projects or initiatives.

- 2. POLICY CHANGES** Communicate policy changes or updates. New organizational policies, procedures, or guidelines that may impact the team's workflow, processes, or responsibilities. Discussing policy changes helps ensure everyone is aware of the latest guidelines and can adapt their work accordingly.

- 3. PRODUCTION** Analyze key production metrics. Reviewing production numbers allows the team to identify areas of improvement, recognize exceptional performance, and make data-driven decisions to optimize production processes.

- 4. GROUP TRAINING** OSHU, CPR, Technology, Communication, New Product

- 5. PRACTICE/DEPT. SUCCESS** Successes achieved by individuals, teams, or the practice. Outstanding performance, significant milestones, successful projects. Sharing successes not only boosts morale and motivation but also reinforces a positive and collaborative work culture.

- 6. TEAM ROCKSTARS** Recognize and appreciate individuals who consistently demonstrate exemplary work, leadership, or innovative thinking. By acknowledging staff rockstars, the meeting fosters a sense of recognition and appreciation within the team, encouraging continued excellence and inspiring others.

1. REFLECTION OF PREVIOUS YEAR'S PERFORMANCE

Analyze financial performance, including revenue, expenses, and profitability.
Evaluate key performance indicators (KPIs) such as patient growth, case acceptance rates, and patient satisfaction scores.
Discuss successes, challenges, and lessons learned from the previous year.

2. MISSION, VISION, AND CORE VALUES

Revisit and reaffirm the practice's mission, vision, and core values. Assess whether they align with the current goals and direction of the practice.
Make any necessary updates or clarifications.

3. GOAL SETTING AND STRATEGIC PRIORITIES

Identify and articulate the strategic goals and priorities for the upcoming year.
Set specific, measurable, attainable, relevant, and time-bound (SMART) goals.
Prioritize goals based on their impact on the practice's growth, patient care, and profitability.

4. MARKET ANALYSIS AND COMPETITIVE LANDSCAPE

Evaluate the local market trends, including changes in patient demographics, competition, and industry regulations.
Assess the practice's position in the market and identify opportunities for growth and differentiation.
Determine strategies to leverage strengths and overcome weaknesses in the market.

5. OPERATIONAL EFFICIENCY AND WORKFLOW

Review current practice systems, processes, and workflows. Identify areas for improvement, such as scheduling, patient flow, and inventory management.
Discuss strategies to optimize operational efficiency and enhance the patient experience.
Sharing successes not only boosts morale and motivation but also reinforces a positive and collaborative work culture.

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- 6. MARKETING AND PATIENT ACQUISITION**
- Evaluate the effectiveness of current marketing strategies and campaigns.
- Explore innovative marketing channels, including digital marketing and social media.
- Develop plans to attract new patients, increase patient retention, and improve patient referrals.
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- 7. TECHNOLOGY AND INNOVATION**
- Assess the practice technology infrastructure and software systems.
- Explore opportunities for adopting innovative technologies, such as digital imaging, intraoral scanners, or practice management software.
- Discuss how technology can improve patient care, practice efficiency, and communication.
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- 8. TEAM DEVELOPMENT AND TRAINING**
- Assess the training and professional development needs of the team.
- Discuss strategies for enhancing team skills, improving communication, and fostering a positive work culture.
- Plan training initiatives, continuing education opportunities, team-building activities, and all-team retreat for the upcoming year.
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- 9. FINANCIAL PLANNING AND RESOURCE ALLOCATION**
- Develop a budget for the upcoming year based on strategic goals and priorities.
- Determine resource allocation for marketing, technology upgrades, continuing education, and practice improvements.
- Identify opportunities for cost savings and efficiency.
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- 10. IMPLEMENTATION AND ACCOUNTABILITY**
- Assign responsibilities and timelines for each strategic goal and priority.
- Develop an action plan with specific steps, milestones, and metrics to track progress.
- Establish a system for regular monitoring, evaluation, and accountability for the implementation of the strategic plan.

MEETING AGENDA



DATE: _____



DR. AWESOME AND TEAM



TEAM CONFERENCE ROOM

Type Of Meeting	ANNUAL MONTHLY DEPARTMENT 1:1 VIRTUAL SOCIAL
Facilitator	
Note Taker	
Meeting Purpose	
Attendees	
Task - Prior to Meeting	Please, Read, Watch, Research...

Agenda Topics

Review previous minutes and parking lot topics	
Agenda Item #1	Presenter:
Discussion:	
Agenda Item #2	Presenter:
Discussion:	
Agenda Item #3	Presenter:
Discussion:	
Rewards / Recognitions	

PARKING LOT TOPICS - CARRY OVER TO NEXT MEETING

CONCLUSION:

CALL TO ACTION	RESPONSIBLE	DEADLINE

Facilitating Effective Team Collaboration

1. Foster Team Engagement

- Encourage transparent group discussions where everyone can freely express their ideas and concerns.
- Utilize break-out sessions and activities to encourage active participation and collaboration.
- Implement text polling to gather and share ideas.
- Conduct anonymous surveys or polls to gather feedback and suggestions for improvement.
- Assess team development needs and provide necessary resources.
- Arrange guest speaker sessions on relevant topics to enhance team knowledge and engagement.

2. Establish Goals for Second Half Success

- Reflect on past performance to identify areas for improvement and growth.
- Adjust previously set goals based on new insights and changing circumstances.
- Collaboratively set realistic and achievable goals for the upcoming period.

3. Enhance Patient Experience

- Implement effective communication strategies, such as phone / text messages, to keep patients informed about office status and response times.
- Utilize various platforms (text, phone, note cards, email) to connect with patients and address their needs promptly.
- Emphasize the importance of delivering exceptional patient care and experiences.

4. Boost Productivity

- Define clear goals for each department to align efforts and ensure progress.
- Analyze industry trends and discuss their implications for improving productivity and efficiency.
- Promote a culture of appreciation by sending thank-you notes or messages to team members for their contributions.

Active Participation from Everyone

1. Rotating Facilitator and Note Taker

- Assign different team members as facilitators and note takers for each meeting to distribute responsibilities and encourage engagement.

2. Call to Action (CTA) in Every Meeting

- Set specific objectives to achieve by the end of each meeting, such as developing an action plan for the next week/meeting, clarifying priorities, and creating a list of actionable items with timelines.

3. Rewards and Recognition

- Cultivate an atmosphere of respect and appreciation within the team.
- Acknowledge and celebrate individual and team accomplishments.
- Implement wellness routines or initiatives to promote the overall well-being of team members.