

Common Sense Staff Meetings

Debbie Castagna and Virginia Moore, U.S.A.

Dental professionals are busy! Busy caring for patients, sterilizing instruments, scheduling appointments, basically performing hundreds of tasks so that the practice runs optimally. However, doctors and staff will benefit by adding one more task to their list—staff meetings. It's critical to take time out to work "on" the practice, not just "in" it.

It's common to hear that practices previously held meetings and then stopped. Excuses like, "we're too busy", "they were a waste of time", "nothing was ever prepared", or "they were gripe sessions" are typical.

It's impossible to achieve a personal best if trapped in the "we're too busy mode". Take time out for business development, communication, and problem-solving. It happens during staff meetings.

In this article, a system for productive, well-prepared meetings that are even *fun* is detailed.

Why Meet?

- To exchange or provide information gleaned from a seminar or an article. The best practices believe learning is an ongoing process.

Total Team Involvement

Everyone is responsible for the meeting's success. Preparation is key and it starts before the meeting. Identifying "roles", or who will be doing what, before the meeting facilitates getting right down to business. Let's take a look at the "job description" for each of the roles:

Facilitator

Prepares the agenda. The agenda is posted in a central area and all are encouraged to jot down discussion items. Include your initials with your topic. In addition, note how much time will be devoted to the topic.

Prepare the meeting room appropriately: adequate seating, a table if possible, notebooks, pencils, and beverages.

Follow the agenda. Stick to the topics and be aware of the time set aside for discussion.

Give everyone the chance to participate. Be comfortable saying, "Susan, we haven't heard from you yet. You have great ideas. What's your opinion?"

This role can be rotated on a weekly or monthly basis. Everyone on the staff is included in the rotation, except for the doctor.

- Focus on solutions. (So meetings will no longer be labeled as "gripe sessions"!)
 - Collaborate, work together. (It's productive, rewarding, and fun!)

The Four Types of Meetings

There are four types of meetings. They are:

- Huddle
- Numbers
- Training
- Teamwork

Let's take a look at each meeting and learn the tools to make these meetings a success.

The Huddle

This meeting is held each day that patients are treated. The doctor and staff will benefit from:

- shared information that prepares them for specific patient treatment and needs,
- a proactive approach to the day that identifies and resolves issues before they become a problem,
- the ability to join together as a team and start the day on a positive note.

Here are the protocols:

All doctor(s) and staff must be present. The value of the information shared, and each person's input, is critical to a successful outcome.

The huddle should be 10–15 minutes in length. A shorter time period can eliminate the sharing of vital information, but any longer and it can become too drawn out and filled with unnecessary discussions.

Stand up! Keep the energy level high, the pace brisk, and everyone's attention focused by standing. Avoiding the sit down "coffee klatch" will foster a sharper focus and better use of time.

Meet in the most private spot available in the office. Patient privacy must be honored.

Chart review should take place prior to the huddle meeting. This speeds up the actual huddle time and keeps the participants focused on reporting, not researching.

To avoid interruptions from patients, have a welcome sign at your front desk that reads:

"To prepare for your appointment, we are in our morning meeting. Please make yourself comfortable and we'll be with you at your appointed time."

To facilitate a smooth flowing huddle, establish a checklist and an order in which the staff will report.

Numbers Meeting

In the first week of each month, schedule a one-hour meeting to review the practice's

numbers from the previous month. By meeting at the beginning of the month any negative trends from the previous month can be addressed quickly, before the trend becomes stronger.

All doctor(s) and staff members are in attendance as the following three-step process is followed.

1. Acknowledge and celebrate every success.
2. Identify areas of concern.
3. Develop an "Action Plan" to correct or improve the concerns raised (more on this later).

Training Meeting

Each month schedule one to two, one-hour meetings to address the following:

- skill practice/role playing
- hands-on training (i.e., use of new materials, fabricating provisionals)
- implementation of Action Plan items
- sharing of information/knowledge gained at conventions or during CE courses.

This is a terrific meeting time as it allow you to actually implement and do the things that are on the Action Plan.

Teamwork Meeting

Schedule one hour, once a month for a Teamwork Meeting. This meeting is the opportunity for team building, planning (i.e., new uniforms, upcoming CE seminars), and to celebrate and reinforce the vision or philosophy of the practice.

The results of more clearly defined meetings are greater accomplishments, more staff involvement, and a higher level of satisfaction and job enjoyment.

Action Plan: The "Success Factor"

So that the goals and objectives of a practice can be met, and the return on investment gained from time spent in meetings, a written Action Plan is a critical tool for success.

An Action Plan clearly states *what* will be done, *by whom* and *when* it will be accomplished. When identifying the *what*, the greatest success is gained through breaking down the necessary action(s) into the smallest steps possible. This increases the likelihood of the step being accomplished, which in turn provides motivation to continue with implementation.

The *by whom* is filled in with the name of the person(s) who volunteers to take on the *what*.


A practical due date is determined, thereby establishing the *by when*.

Follow-up of the Action Plan takes place at the beginning of the next meeting. The habit of acknowledging what has been completed and what is yet to be done establishes a continuity that assures accountability and completion of plans and, ultimately, goals.

Meeting Ground Rules

Use these meeting ground rules during implementation of the staff meeting system. Learn them, review them prior to meetings, and keep them posted where meetings are held to serve as a guide.

- Everyone attends.
- Keep the time sacred: don't schedule into or over the allotted time, and start and end the meeting on time.
- Commit to open and respectful communication.
- Prepared an agenda with roles clearly identified before the meeting.
- Follow-up on action plans from the last meeting.
- Create new action plans.
- Keep food to a minimum.

Enjoy the satisfaction, pride, and success that are the result of productive common sense staff meetings! 



- To brainstorm ideas or the causes behind issues that require solutions. Don't let practice problems perpetuate! Great ideas are a result of total team involvement.
- To establish practice goals and objectives. Production, collection, new patients, remodeling the facility, and hiring new staff are examples.
- To motivate and inspire. Pull together during difficult times rather than avoiding a meeting to discuss the issues at hand.
- Staff meetings are a great opportunity to celebrate successes! Be encouraging, appreciative, and don't forget to celebrate small victories too!

Recorder

- Save time writing by quoting the speaker during note taking.
- If necessary, ask for clarification from the speaker.
- If falling behind, ask the group to slow down.
- Copy the notes and file them chronologically in a binder designated for staff meeting notes and action plans.
- This role can be rotated on a weekly or monthly basis. Everyone on the staff is included in the rotation.

Participants

- Come to the meeting with the expectation of being fully engaged.
- Offer support when necessary.

Contact Info

Debbie Castagna and Virginia Moore are the founders of Insight Solution, a speaking, consulting, and training resource company dedicated to revitalizing the spirit and business of those they work with. They have brought a smarter way of practicing, and increased productivity, and profitability to dental teams in the United States and Canada.

Their sage advice is a result of years of hands-on experience in the business and clinical aspects of dentistry. They have co-authored the training resources "The Doctor as CEO" and the "The Ultimate Staff", as well as numerous articles on practice management. They present thought-provoking seminars that have positively impacted thousands of dental professionals.

Their presentations and consulting style will grab your attention, keep your focus, lead you to insight and solutions...and serve as a reminder that we work in a profession that offers endless possibilities!

You may contact Ms. Castagna at:
Insight Solution
38 Creekside Court
Corte Madera, California 94925
E-mail:
dcastagna@insight-solution.com

You may contact Ms. Moore at:
Insight Solution
1010 Jefferson Street
Red Bluff, California 96080
E-mail:
vmoore@insight-solution.com

Or visit them online at
www.insight-solution.com.