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Productive Meetings



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Productive Meetings

Save Time and Money by Conducting Effective Office Meetings

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As practice owners, dentists face many challenges in their efforts to keep their team focused and their office organized. They constantly ask themselves questions such as: How do I keep all of my team members aligned with the goals of the office? How do I minimize chaos within the office and bring order to the things I do? How do I make improvements? How do I get my staff to take responsibility and solve problems within the practice?

Holding regular staff meetings is the answer to each of these important questions. Many offices, however, struggle to make their meetings effective. In their experience, meetings become either random discussion of problems within the practice, gripe sessions for employees, or monologues delivered by the dentist to which no one pays attention. Team members, in turn, often express frustration that their input is not being valued. In the end, there are no positive results or improvements. The time allotted for the meetings eventually seems wasteful and the meetings are then often abandoned.

The biggest blunder in organizing meetings is the tendency to cover every conceivable issue within the framework of a single meeting. Meetings become a hodgepodge of brainstorming sessions, daily schedule reviews, human resources (HR) policy discussions, new service introductions, staff training, and staff recognition. Meetings can only be effective when the scope is limited and all participants understand the purpose of the meeting.

Dental team meetings

In dental offices, there is a need for three types of meetings:

1. *The Morning Huddle*: This is a brief, five- or 10-minute meeting at the beginning of the day. During this meeting everyone looks at the schedule together. The purpose is to designate responsibilities and assignments for the day and to head off potential problems.
2. *Operational Review*: This is a short, 20- to 30-minute meeting conducted once per week. The entire team participates in this meeting, including front office staff, dental assistants, and hygienists. The purpose is to look at where the office stands in terms of weekly

production goals and to examine the schedule for the next week. It enables everyone to anticipate problems, minimize stress, and maximize productivity. It is also an opportunity to examine the overall efficiency of the office and to discuss how customer service and patient care may be enhanced in simple ways. This is not a place to cover emotionally charged issues.

3. *Ad Hoc Team Meetings*: This is a longer meeting of one to two hours that is scheduled when the need arises. The meeting may be motivated by:

- ongoing training for clinical or front office staff;
- addition of new services or new equipment;
- significant changes to HR policies, benefits, or office hours;
- the need for a brainstorming session to identify solutions to a complex problem;
- the need for recognition of outstanding performance by a team member; or
- a presentation by a vendor.

The remainder of this article will focus on the second type of meeting: the operational review. This, in our experience, is the most important type of meeting for any dental practice. Over time, these meetings produce consistency and reduce stress on a daily, weekly, and yearly basis.

Rules and tools of engagement

All meeting participants must abide by certain ground rules set forth by the team leader; that is, the dentist. Those rules may include:

1. No eating or drinking.
2. Everyone arrives on time.
3. Participants talk one at a time.
4. Everyone must stay on topic.
5. Everyone participates.
6. No cell phones. Also, office phones are not answered during the meeting.

Additionally, the following items should be at hand for every meeting.

1. Simple white board with dry-erase pen and eraser.
2. Copies of weekly dentist and hygiene production for review by entire staff.
3. Copies of the next week's schedule for the entire staff.

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4. A designated facilitator. Either the dentist or a senior team member with the skills and authority to make decisions and keep the meeting focused should facilitate meetings.
5. A set agenda for the meeting. Some flexibility should be built into the agenda to address any unusual problems that may come up. Team members may add to the agenda by informing the dentist or meeting facilitator of any additional items they want to discuss.

Participant skills

All participants should work toward mastering the following skills. Dentists and senior team members should mentor the team so that all staff improve or acquire these skills over time.

1. *Listening:* This is probably the most difficult skill to acquire. Team members should generously listen before they voice their opinion regarding suggestions offered by another participant.
2. *Critical thinking:* Team members should learn to look objectively at the data and challenge the information presented for inaccuracies, bias, or omissions.
3. *Problem solving:* This involves proactively proposing solutions to resolve the problem and staying open to different solutions and alternatives.
4. *Clarifying:* This is about ensuring that the entire team understands a point.
5. *Motivating:* The leader should draw out silent members to speak and contribute their thoughts. He or she also should assist the group in dealing with frustration and stress.
6. *Communicating:* The team leader should deliver information in a clear, specific, and concise way.
7. *Timekeeping:* This is primarily the facilitator's task, but all participants have a responsibility to keep the group focused on the agenda, with an eye on the clock. Team members who take too long to make their point might need help refocusing.

With feedback and encouragement, you will find that team members will show improvement in many of the above areas over the course of only a few months—hesitant team members will start to become major contributors, those with poor listening skills will turn into better listeners, the solutions that team members present will become more thoughtful, and everyone's communications skills will improve.

Participation and contributions at team meetings should be considered in performance reviews for each employee. Team members must be proactive at meetings and must complete the agreed-upon action points in a timely manner.

The operational review process

It is important for all participants to understand the basic process of an operational review and make sure the group follows it. The process is illustrated above.

Step 1: Review action points from the previous meeting. Check off actions already completed and find out what is

delaying actions that should have been completed.

Step 2: Present and review data.

The front office staff presents dentist production and hygiene production for the week, total office collections, the number of new patients seen, and any gap relative to target production goals. Everyone also takes a critical look at the weekly schedule.

Step 3: Identify problems to be resolved.

Points that may be discussed include how to deal with areas of the schedule that look tight, identification of downtime and potential ways to fill the schedule, inefficiencies at the front desk or the clinical area, ensuring adequate preparation for a particular patient, or observed deficiencies in customer service.

Step 4: Find solutions.

Share and gather ideas from all participants to agree on solutions and solve the problem. This is intended to be a quick problem-solving session. If the problem requires extensive debate and thought, it is assigned to a subcommittee or group to work on separately and report at the next meeting.

Step 5: Delegate actions.

Assign actions from Step 4 to a person or group along with a deadline for completion. This is the step that turns ideas into action. The action points are then reviewed at the beginning of the next meeting in Step 1.

Done right, the benefits of short, regular operational review meetings far exceed the payroll cost. By conducting operational review meetings, you assist the office in meeting its goals; keep the office organized and running smoothly, with consistency in the delivery of services; keep the team aligned toward practice goals; provide a platform for continuous improvement; provide an opportunity to intercept and resolve problems before they turn into a crisis; build team work and morale; confirm and clarify each individual's role; and, most importantly, affirm the values of your practice. ♦

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