



# MEETINGS—CRITICAL TO PRACTICE GROWTH

By Roger P. Levin, DDS



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All businesses hold meetings. Some are effective. Some are ineffective. Some are an outright disaster.

For dentists and specialists, meetings keep doctors and teams energized—*if* handled correctly. For morning and staff meetings, it is essential to follow these guidelines:



- **Create a well-defined vision**
- **Develop a written agenda**
- **Start and end on time**
- **Establish a cooperative atmosphere**

## **Create a well-defined vision**

Everyone should know *why* a meeting is taking place. The doctor should lay out a clear vision for all meetings. When staff members understand the purpose, they become actively engaged in the process.

## **Develop a written agenda**

A written agenda should be distributed in advance so the staff members can review it and be better prepared to participate. In creating an agenda, the doctor and the office manager should gather potential topics, review them and then prioritize them. This way, if there is not enough time to cover every agenda item, the most critical topics will have been covered. Solicit suggestions for meeting topics from all team members. Simply saying, “What do you think we should talk about?” gets team members involved and feeling like they have a stake in the meeting. Whenever possible, assign a subject to an individual for initial discussion. This helps break the ice and gets others involved.

## **Start and end on time**

Punctuality matters. When doctors use staff meetings as time to fit in unexpected emergencies, make phone calls, catch up on a few things, etc...it sends a message to the team that the doctor doesn't consider the staff meeting to be important. Practices that routinely start 10 to 15 minutes late are telling the team that the meeting is not a key driver for the practice. Set a time for the meeting and stick to it. Send a message that the doctor values the meeting and everyone's time.

## **Establish a cooperative atmosphere**

All team members must have opportunities to participate when they choose to do so. In too many staff meetings, team members tend to interrupt each other, the doctor does all the talking, or a few people dominate the discussions about every topic. Ultimately, such behavior undermines the purpose of the meeting. Even worse, the practice doesn't hear good ideas from staff members who fail to speak up because they sense they will be talked over or interrupted.

To get more team members talking, the doctor or office manager can ask, “What do you think about this?” This simple strategy brings all team members into the discussion and rebalances the entire atmosphere of the meeting. Respect for all opinions is critical. If the staff meeting is dominated by one or two individuals, then it is not a staff meeting but more like a session that allows people the opportunity to do little more than rant. Good meetings are dialogues—not monologues. If one or two individuals are monopolizing the discussion, the doctor must intercede and get *everyone* involved.

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## HOW MORNING MEETINGS SHOULD WORK

Through effective daily meetings, practices can enjoy the most predictable way to have a significantly productive day. When practices fail to hold consistent daily meetings, chaotic, stressful days are often the result.

Each day the practice sees patients, morning meetings should be held to focus on the current day's patients, schedule, opportunities and potential problems. Of course, recurring issues brought up consistently in the morning meetings should be discussed and handled at the staff meeting.

Levin Group recommends the following steps for morning meetings:

- **Keep it short (10-15 minutes)**  
There's no need for long morning meetings. Practices that give up having morning meetings do so because they held interminably long meetings.
- **Hold the meeting away from the front desk area (if possible)**  
Meeting in the front desk area will prove distracting. For team members, it will be too tempting to answer ringing phones or do paperwork.
- **Designate a leader (scheduling coordinator)**  
A meeting without a leader guiding it is just a roomful of people talking. It's too easy to get sidetracked if someone isn't in charge of keeping the meeting focused on core issues.
- **Review charts in advance**  
When the clinical team reviews charts, they should look primarily for three things:
  1. Unaccepted treatment plans
  2. Complications
  3. Difficult patients
- **Check messages before beginning**  
There may be an emergency message that will affect the day. It is better to know about it during the meeting.
- **Avoid distractions**  
Put a sign at the front desk that reads, "We are in a morning meeting to serve you better. Please have a seat and we will see you momentarily."
- **End on time**  
The doctor and the team have a busy day ahead. There is no sense adding to the pressure by ending late and starting the day behind schedule.



## CREATING BETTER STAFF MEETINGS

Held every four to six weeks, staff meetings serve a critical function in general and specialty practices. These gatherings improve communication, inspire cooperation, and help build a stronger team. The ultimate goal—to bring the entire staff together for the purpose of practice and staff building.

In the business world, companies expend much effort and energy to create effective meetings. Doctors usually do not have that luxury due to the hectic pace of most dental practices.

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Levin Group recommends the following steps to ensure staff meetings are positive and results-oriented:

- **Schedule 12 months in advance**  
Set aside 60–90 minutes for staff meetings. Hold them during business hours, preferably in the morning. Avoid scheduling them on or near peak times if patients are being seen that day.
- **Consider meeting off-site**  
Getting out of the office to a “neutral” location can make everyone more relaxed and open to discussion.
- **Focus on larger issues**  
Less important topics can usually be covered in morning meetings.
- **Designate a meeting leader**  
Without question, the doctor is the best choice. These are high-level meetings and the doctor as leader should control the direction.
- **Assign a note taker**  
What is the point of having a productive meeting if what was discussed is forgotten forever because no one took good notes? A written record of each meeting provides documentation for future reference. It also prevents anyone from misinterpreting what was discussed.

## Items for discussion during staff meetings:

- **Vision statement**  
The vision says where your practice is heading in the next few years. Are you on track to achieving that vision? Staff meetings are a good time for reinforcing the vision and keep all team members on-target.
- **Review outstanding items**  
What gets addressed, gets done. Leaving issues unfinished always creates problems.
- **Production/collection**  
Know if these areas are under control. If the numbers aren't where they should be, brainstorm solutions and design an action plan.
- **Technique updates**  
Is everyone up-to-date on the latest procedures and the newest technologies in use? This is an excellent opportunity to gauge future training needs for team members.



## What Should Be Accomplished?

When a staff meeting ends, two things should occur:

1. **End it on time**  
This can't be stressed enough. When meetings don't end on time, people don't look forward to the next one because they anticipate this happening again. Please everyone by ending when you say you are going to end.
2. **Wrap up with next steps and assignments**  
A staff meeting that ends inconclusively is not worth holding in the first place. Since there is considerable time before the next staff meeting, there needs to be a solid action plan when the meeting ends. All team members should be aware what is expected of them for the next meeting.

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## Conclusion

Truly productive meetings serve two main functions. First, they reenergize the staff, promote teamwork and instill confidence in the doctor's leadership. A crew behind its captain means a smooth-running ship. A secondary function is equally important—effective meetings give the doctor peace of mind, knowing that the practice is running smoothly and efficiently. Peace of mind reduces stress, which is an important objective today. In Levin Group's Annual Practice Production Survey for *Dental Economics*, statistics show that more than a quarter of dentists experience high or very high stress.

The importance of meetings cannot be overstated. Morning meetings keep each day focused. However, every practice will face challenges that cannot be addressed adequately in the course of a normal day. Staff meetings are an excellent forum for creating solutions and implementing positive, sweeping change. The action steps discussed in this whitepaper will help doctors make their meetings more effective, efficient and productive.

## Dr. Roger P. Levin

Dr. Roger P. Levin is a third-generation general dentist and the Chairman and CEO of Levin Group, Inc., the largest dental practice consulting firm in North America. A keynote speaker for major dental conferences, Dr. Levin presents more than 100 seminars per year. He has authored 68 books and more than 4,000 articles. In 2014, he received the Dental Excellence Award for Best Practice Management Consultant from *DrBicuspid.com*. For the past 12 years, he has been named one of the "Leaders in Dental Consulting" by *Dentistry Today* magazine.



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