

What is the Number 1 thing you can do to increase Team Communication, Productivity, Profitability and Reduce Stress? *Have a successful morning huddle.*

A Morning Huddle costs you almost nothing, and it creates the momentum for the day. This momentum will help foster a positive team attitude and environment for achieving the best patient care and experience. At the same time, the morning huddle creates the best opportunities to reach your daily goals! Benefits of a daily huddle:

- Sets the tone for the day
- Increases productivity
- Reduces stress
- Increases team communication
- Creates ACCOUNTABILITY
- Allows optimum patient care
- Locating all areas of opportunity

The Morning Huddle should take just 10-15 minutes. It should not become a gripe session, or a time for discussion of larger practice issues, such as changes in policies. If these items are brought up, they should be added to the monthly Team Meeting agenda, and tabled until that time. Team members should take turn running the huddle, switching leads each week. Each team member should be responsible for bringing information to the huddle (listed below). The Morning Huddle format is:

- Agenda should cover:
 - Yesterday
 - Today
 - Tomorrow
- 10-15 minutes
- Not for in-depth discussions
(Helps to assign a team member to keep huddle on time)

Yesterday

Always begin with yesterday. Did you reach your daily goal? If yes, then congratulate the team. If not, can you make it up today? This helps keep the team focused on production targets. It is very important to track the dentistry that is diagnosed and presented versus what is actually accepted. Differences between the two should be discussed for solutions, such as increased intra oral camera usage, updated radiology and case presentation. What is your protocol for follow up phone calls? Will all patients who had an invasive procedure receive a phone call? A filling, crown prep, SRP? What about emergencies? Thank you phone calls for referrals? Were these calls made? Were any discussion items added to the next Team Meeting? Cancellations and no-shows are at an all-time high and are extremely costly to a practice. Most offices believe they are appointing 100% of patients when they leave the practice but when measured it is not uncommon to find only 50%-60% pre-appointed. Your goal should be 80%+ patients leave with a scheduled appointment. Also note if family members are not currently in the schedule.

- Care calls (RDA/RDH)
- What went right / wrong (write on staff meeting agenda) (TEAM)
- Brief review of patient compliance (per provider) (TEAM)
- Production (FD)
- Collections (FD)
- NS/CA's (FD)

Today

Today will take the majority of the morning huddle time. Are you scheduled to goal today, and what opportunities do you have for same day dentistry. It is not uncommon for a practice to have 30% plus of their daily production done after the morning huddle! Review the outstanding treatment plans, updated radiographs, cosmetic dentistry opportunities, SRP needs. New Patients on the schedule today, who referred them? Who should be thanked for the referral? How are birthdays being acknowledged and any special events ie; a promotion at work, their child is in the state playoffs?

- **Production (FD)**
- **Collection (FD)**
- **Collection exceptions**
- **Radiograph/exam review (are they current?) (RDA/RDH)**
- **Are today's patients/families current in hygiene? (RDA/RDH)**
- **Who has unscheduled treatment plans? (TEAM)**
- **Same day dentistry opportunity (DR/RDA)**
- **Discuss New Patients (FD)**
- **Current events (birthdays, promotions, sports, etc.) (TEAM)**
- **Select 5 targets for referrals (TEAM)**
- **Where could emergencies fit in the schedule? (DR/RDA)**

Tomorrow

Tomorrow, are you scheduled to goal? If not, what opportunities are there to increase production including filling any open schedule times? New Patients on the schedule, what personal information do you have to be able to welcome them to the practice with? Assign tasks, such as who will be making the follow up calls and determine which patients will receive them.

- **Production goals (FD)**
- **What does the schedule look like? (FD)**
- **Are the lab cases in? (RDA)**
- **Do we have all materials needed? (RDA/RDH)**
- **Pre-med patients / special needs (RDA?RDH)**
- **Any schedule changes (TEAM)**
- **Locating areas of opportunity (TEAM)**