

Morning Huddle

Make Your Morning Huddle Count

PURPOSE

A well planned and focused daily huddle greatly impacts a dental team's ability to work cohesively, create a seamless flow, increase efficiency, reduce stress and provide exceptional patient care. The best huddles are inspiring and create a sense of aligned purpose.

The first step to leveraging your team efforts is to develop a huddle agenda that caters to your practice goals and challenges. If you are facing issues such as last minute cancellations and no-shows, you may want to track that data as a team at your morning huddle and brainstorm recovery ideas. If you are

working to master time management, you may want to have a line item on your huddle form that invites you to debrief yesterday's schedule and see what you can learn to make today better. If you are developing a sophisticated clinical coordination system for comprehensive case management, you may want to have a lab section on your huddle agenda to forecast steps in the process.

The more personalized your morning huddle agenda is to your level of development and goals, the more compelling the information will be.

DESIGN



Clarify your practice objectives and challenges



Create a Huddle agenda to guide you in accomplishing your goals.



Create a pre-huddle preparation check list- for various roles in each department.



Determine logistics such as location, start time, shared leadership, and how to aids such as computer utilization, patient route slips, new patient phone slips, schedules, monitors and inspirational materials.

PREPARATION QUESTIONS TO CONSIDER

Time Management:

- Are we properly scheduled? Have we allocated enough time to fully serve every patient with our best and finest care? ... to provide the services we promised?
- Emergencies: What are the most appropriate times to serve patients with urgent care needs? How can we be ready?
- Recovery suggestions for available time in the schedule
- Patient commitment to scheduled treatment, will they be here?

Morning Huddle • Terry Goss & Associates



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 **Terry Goss**
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Maximizing Authentic Potential

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Relationship Building

- Possible patient facilitation opportunities, how to anticipate?
- Is every patient scheduled for recare?
- Is every patient up to date with their account?
- Is there a patient scheduled today that is ready for their next phase of treatment?
- Is there a patient scheduled who has not had a comprehensive exam or it has been over 5 years?
- Who would we like to ask for referrals? Give referral appreciation card?
- How can we make today's visit an exceptional experience?
- Is there a patient scheduled who has had a birthday this week?
- Is there a patient to acknowledge for a personal accomplishment?

New Patients

- Identify and share info from intake phone slip
- If scheduled in hygiene for the first time, plan for introduction and hand off by new patient coordinator.

Continuing Care Patients

- What do we know about our patient's dental health goals and outcomes- what do we not yet know?
- Do existing patients have a well developed plan for life long health - where are they in there plan?
- What are the patient's barriers to treatment?
- Opportunities for patient facilitation.
- Internal marketing opportunities - beg for patient feed back/ satisfaction surveys/ post-op calls and cards/ referral appreciation cards.
- Multi media aids and resource materials relevant to patient conditions and goals.

HOW TO

- Start on time
- Appoint a huddle leader to keep meeting on track. (no tangents or diversions)
- Review your day via your custom designed huddle agenda
- Finish on time
- Follow up on any issues that arise

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Sample Huddle Agenda

Facilitator: _____ Date: _____

	Notes	Follow Up
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- | | | |
|--------------------------|----------------------------------|---|
| <input type="checkbox"/> | Yesterdays Schedule | What do we have to celebrate from yesterday?
Problem areas yesterday? |
| <input type="checkbox"/> | Overnight Changes? | Update team on current schedule status |
| <input type="checkbox"/> | All Pts Confirmed? | Make notes of clients you could not reach |
| <input type="checkbox"/> | Time Allocations Correct? | Last chance to problem solve and proactively handle potential scheduling conflicts |
| <input type="checkbox"/> | Emergencies? | Team identifies when it would be best to schedule any emergencies
Pain / Swelling / Location?
Previous Treatment / Diagnosis?
What was promised today? |
| <input type="checkbox"/> | Openings For Today | Make entire team aware so they might help fill schedule with their clients |

Facilitation Opportunities

- | | | |
|--------------------------|-----------------------------------|---|
| <input type="checkbox"/> | New Patients Scheduled | Introduce the team to the NP's via the Phone Slip |
| <input type="checkbox"/> | Hyg Pts w/ Incomplete Tx | |
| <input type="checkbox"/> | Pts ready for goal setting | |

Hygiene

- | | | |
|--------------------------|--------------------------------|--|
| <input type="checkbox"/> | Pre-Med / Health Alerts | |
| <input type="checkbox"/> | Perio Charting | |
| <input type="checkbox"/> | Dr Exam | |
| <input type="checkbox"/> | I/O Camera | |

Clinical

- | | | |
|--------------------------|-----------------------------------|-----------------------------------|
| <input type="checkbox"/> | Pre-Med / Health Alerts | |
| <input type="checkbox"/> | Tx Today & What's Next | |
| <input type="checkbox"/> | Comfort Aids | Any patient with special requests |
| <input type="checkbox"/> | Recare Not Scheduled? | |
| <input type="checkbox"/> | Cases Completing Today? | Celebrate & request testimonials |
| <input type="checkbox"/> | Labs in? | |

Administration

- | | | |
|--------------------------|-----------------------------|---|
| <input type="checkbox"/> | Collections Issues | |
| <input type="checkbox"/> | Future Forecast | Make team aware so they can create realistic expectations with clients of when they can be seen |
| | First Opening For NP | |
| | First Opening For Tx | |

Motivational Quote

Leadership / Team
Mission Statement
Humor

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Huddle Agenda

Yesterday's Schedule:

- a. What do we have to celebrate?
- b. Problem areas?
- c. Report on Post-Op Calls?

Follow-Up:

Today's Schedule:

- a. Overnight Schedule Changes?
- b. Problem Areas?
- c. Where would you like emergencies?

Follow-Up:

New Patient Info:

- a. Review Phone Slip
- b. What was promised today?

Follow-Up:

Emergency Patient Info:

- a. Conditions?
- b. Previous Treatment / Diagnosis?
- c. What was promised today?

Follow-Up:

Hygiene:

- a. Pre-Med and Health Alerts?
- b. Perio Charting?
- c. Dr. Exam?
- d. Patients with Incomplete Treatment?

Follow-Up:

Dr. Schedule:

- a. Pre-Med and Health Alerts
- b. Tx Planned and What is next?
- c. Special Needs / Requests?

Follow-Up:

Lab Case Coordination:

- a. Status of Cases Due Today
- b. Status of Cases Due Tomorrow
- c. Status of Cases Due to Go-Out

Follow-Up:

Internal Marketing Opportunities:

- a. Referral Appreciation Cards
- b. Patients to Send Personal Notes
- c. Post-Op Calls

Follow-Up:

Financial Concerns:

- a. Delinquent Accounts?
- b. Financial Understandings?
- c. Payments due

Follow-Up:

Production Status:

- a. Scheduled to Goal Today?
- b. MTD Goal? MTD Actual?
- c. Next Open Prod Block?

Follow-Up:

Motivational Quote:

Leadership / Team
Mission Statement
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