

## Advanced Team Meeting Format

**One Hour; Once/Month; Entire Team**

**Always run by Agenda (attached) and timekeeper**

**An overview question for consistency: “How can we do it better?”**



**Monthly Business Meeting** - held after the 1st of the month.

Goals: to review the practice business.

to identify successes and areas for improvement.

to determine topics for on-going required training

- Review all Practice Monitors/Metrics:
  - Monthly
  - Accounts Receivable and Reconciliation
  - Adjustments Monitor
  - Hygiene Pre-appointing %, recare efficiency
  - Marketing - new patients and referral sources
  - Treatment Diagnosed Monitor
  
- Compare results to goals
- Review scheduling - G.O.O.T.?
- Any concerns re: patient relationships?
- Review Project Board - who's accountable?

### Topics for Training and discussion:

- Charting
- Agreements
- New Patient Experience
- Enrollment
- Intra oral Camera
- Treatment Plans
- Recare
- Confirmation/courtesy calls
- OSHA
- Chart audit plan
- Perio program and calibration
- Case Presentation and Acceptance
- Hand offs
- Coaching Implementations
- H.I.P.P.A.
- Coding
- Technology
- Scheduling
- X-rays
- Hygiene protocol
- Marketing Plan
- Co-Diagnosis Case Review
- New/revised clinical procedures
- New products

**TEAM MEETING AGENDA**

**DATE** \_\_\_\_\_

TOPIC	BY WHOM	TIME REQUIRED
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