

## Morning Huddle

“Failure to prepare is preparing to fail.”  
-John Wooden

Holding a very brief team meeting at the beginning of every day is absolutely necessary if your practice is going to achieve peak performance!! I cannot emphasize this point enough. **Every** successful practice I have ever worked with not only conducts a morning huddle each and every morning, but they have mastered the morning huddle as a means of making the most out of every day.

The primary purpose of the morning huddle is to prepare for the day. It is more about ‘people’ than about process. By that I mean, that the focus of the morning huddle needs to be on the patients you are seeing today, their unique needs, and how you and your team members can make their visit an exceptional experience. While it is very appropriate to discuss necessary materials and other clinical details, the focus of the morning huddle should be on the people you are seeing today.

To be successful, your morning huddle needs to be very efficient and no more than 10 minutes long. To stick within this time constraint you must strictly limit the topic of the morning huddle to today’s schedule. The morning huddle is not a general team meeting; rather it is a very focused meeting solely about today.

Here are some suggestions and ground rules for your morning huddle:

- Start the morning huddle 15 minutes before your first patient.
- Every team member needs to attend. This point is absolutely critical, if you have partial attendance then the morning huddle cannot serve the function of getting everyone on the same page.
- Not only does every team member need to attend, but they must be on time and ready for the morning huddle. That does not mean eating breakfast or putting on their makeup (I have even witnessed team members ironing their clothes), it means ready to contribute to the morning huddle without distraction!
- Clinical team members need to have reviewed patient charts **before** the morning huddle. If they are reviewing charts during the morning huddle you will never be able to complete the meeting in 10 minutes.

- Post a nice laminated note at your front desk informing your patients that you are holding a brief morning meeting and that someone will be with them shortly and that they should make themselves comfortable. A classic mistake that I often observe is that an administrative team member is answering phones and greeting patients and pulled away from the morning huddle. This needs to be avoided since it is very important that all team members participate in the morning huddle.
- I recommend rotating the leadership of the morning huddle on a monthly basis. Each month assign a different team member to lead the morning huddle. This person is responsible for filling out the information on the morning huddle checklist, making a copy of this checklist for every team member, and conducting the morning huddle from start to finish.

The following page is a checklist that I recommend that you use as a template for your morning huddle. Using this checklist will insure that your morning huddles are consistent and productive. Understand that it will take you a bit of time to master your own morning huddle. If you have not been conducting a meeting of this sort in the past, you should expect to go through a learning curve as you refine your own meeting. Expect some setbacks. I can assure you that there will be times when team members are late or have not prepared for the morning huddle by reviewing their charts for the day. I can also assure you that team members will try to expand the topic to general office business. The doctor's leadership here is critical!! Let your entire team know that you are committed to holding a morning huddle every day and that you will keep working on and refining it until the morning huddle is efficient and productive.

The last comment that I have on the morning huddle is that in addition to preparing for the day and preparing for the people you are serving today, the morning huddle is also about identifying opportunities so that you can make the most out of each and every day. The case study below will demonstrate how the morning huddle can help you maximize each day.



### **Case Study: Make Each Day Your Masterpiece!**

I have a client who was struggling with achieving consistently productive days. Overall our production was good but the daily production was all over the map. One day was very productive while the next day wasn't at all productive. We identified this issue and decided to use the morning huddle to really focus on identifying additional production opportunities each day. The end result far exceeded our expectations.

We emphasized the importance of making the most out of every day and then we tracked our daily production over a period of six months. In our tracking we discovered that only 20% of the days were scheduled to the daily production goal when the day started. However, during this six-month period of time, by the end of the day this office was able to make goal 80% of the days. They used the morning huddle to identify additional production opportunities and then helped every team member focus on educating and motivating patients on today's schedule to accept necessary treatment. Whenever possible, we would make arrangements in the schedule to do that treatment today!!

The lessons learned in this practice enabled me to make some changes in the morning huddle checklist that follows. Let me encourage you to use this checklist as a tool to make the most out of each day.





## Morning Huddle Checklist

**1. A review of yesterday:**

Dr. Production Goal: \_\_\_\_\_ Actual Dr. Production: \_\_\_\_\_

Hygiene Production Goal: \_\_\_\_\_ Actual Hygiene Production: \_\_\_\_\_

New Patients: \_\_\_\_\_ Units Scheduled from N.P.'s: \_\_\_\_\_

Hygiene Exams Conducted: \_\_\_\_\_ Units Scheduled from Hyg.: \_\_\_\_\_

FMX's taken in hygiene: \_\_\_\_\_

Number of evening 'we care' calls made: \_\_\_\_\_

**2. A look at today:**

Dr. Production Goal: \_\_\_\_\_ Projected Dr. Production: \_\_\_\_\_

Hygiene Production Goal: \_\_\_\_\_ Projected Hygiene Production: \_\_\_\_\_

**3. Are production blocks scheduled for next five days?**

**4. Next opening in Dr's schedule?**

**5. Next opening in hygiene schedule?**

**6. Identify patients to use intra-oral camera on today's schedule**

**7. Identify patients to take digital photos on today's schedule**

**8. Morning emergency slot \_\_\_\_\_ Afternoon emergency slot \_\_\_\_\_**

**9. Financial information on today's patients**

**10. New patient review (review telephone slip)**

**11. Challenges and/or celebrations in today's schedule**

**12. Thought for the day.....**



## *Instructions for the Morning Huddle Checklist*

The purpose of this section is to briefly review yesterday's performance. Most items are self-explanatory. Units scheduled from new patients and units scheduled from hygiene refer to crown or veneer units. For the very last item, I like the doctor to report on the number of evening phone calls made to yesterday's patients (this reporting creates accountability).

This section may be the most important part of the morning huddle since it allows you to identify if you are scheduled to goal or not. If not, then we must look for opportunities to make goal.

\_\_\_ Ask the scheduling coordinator to report on the status of our production blocks for the next five workdays.

\_\_\_ Identify the first available opening in Dr's. schedule.

\_\_\_ Identify the first available opening in the hygiene schedule.

\_\_\_ The intra-oral camera is an awesome educational and motivational tool. The purpose of this section of the morning huddle is to identify patients on today's schedule to use the intra-oral camera.

\_\_\_ The digital camera may be even more useful than the intra-oral camera since it shifts the focus to the entire smile rather than on individual teeth. The purpose of this section of the morning huddle is to identify all patients on today's schedule who you would like to take the series of five digital photos. Identify who will take the photos and who will load them into the computer.

\_\_\_ Ask the doctor to recommend a morning emergency slot and an afternoon emergency slot.

\_\_\_ Ask the financial coordinator to provide a financial 'heads up' on today's patients.

\_\_\_ An administrative team member should tell the entire team everything she knows about any new patients on today's schedule.

\_\_\_ Identify any special challenges or celebrations for any patients on today's schedule

\_\_\_ The doctor concludes the morning huddle in a positive manner by reading a thought for the day.