

DAILY FRONT DESK CHECKLISTS #2A AND #2B MORNING MEETING

The morning huddle is a team participation activity with the goal of being completely prepared for all of today's opportunities and potential challenges. We recommend gathering the whole team about 20 minutes before the first patient is to arrive to share this information. We also believe that the key to helping the practice grow is to share worthwhile information with the team: business metric information AND logistic and opportunities.

Every practice should have a morning meeting to discuss the specifics of the day. Not only should all team members be present for the meeting, but they should be ACTIVE participants in the meeting. In other words, team members shouldn't be half awake and barely listening. We think they should be paying close attention and presenting crucial information about that day's patients. We think EVERY team member should have some daily information to present. Some offices have the front desk presenting specific goals for the day—and that's great—but that meeting should also include participation from the assistants and hygienists about the patients in the schedule.

There are two Checklists for the Morning Meeting: Checklist #2A and #2B.

Checklist #2A calls for a daily recap of the previous day and looks for current day opportunity. This list should be completed by the front desk.

- Yesterday's Daily Production Goal: Enter the previous day's production goal amount.
- Yesterday's Actual Production Total: Enter the previous day's actual production.
- Percentage of Yesterday's Goal Achieved: Actual Production Divided by Daily Production Goal.
- Yesterday's Treatment Opportunity: Determine the production for all the previous day's diagnosed treatment.
- Yesterday's Actual Treatment Scheduled: Determine the production total from yesterday that was actually scheduled.
- Today's Daily Production Goal:: Enter the current day's production goal amount.
- Today's Scheduled Production: Enter the current day's scheduled production.
- Today's Treatment Opportunity: Determine the production for today's diagnosed treatment.
- Patient Birthdays: Have any of today's patients had a recent birthday or have one upcoming in the near future?
- Treatment Opportunities: Are there any patients on today's recare schedule who have outstanding treatment needs? Indicate patient name, treatment need, and the patient's potential roadblock. Use that information to revisit treatment needs again with patient and overcome challenges.
- Recare Opportunities: Patients on today's treatment schedule who are overdue for recare, have family members due for recare, or have one scheduled within a month. Is it possible to just see these patients today? Indicate patient name, determine when their recare is scheduled, and verify with insurance, if necessary, to see if the patient can be seen earlier.
- Office Chores: There is ALWAYS something that can be done in a dental practice.
- Emergency Appointment Time: Decide in the morning meeting where the best time would be to put emergency appointments should they arise today.

DAILY FRONT DESK CHECKLIST #2A MORNING MEETING

Date:

Metrics/Logistics

Yesterday's Daily Production Goal \$	Yesterday's Actual Production Total \$	% of Yesterday's Goal Achieved %	Yesterday's Treatment Opportunity \$	Yesterday's Actual Treatment Scheduled \$
Today's Daily Production Goal \$	Today's Scheduled Production \$	Today's Treatment Opportunity \$	Patient Birthdays	

Treatment Opportunities (Patients on today's recare schedule who have outstanding treatment needs.)

Patient Name	Overdue for recare or have recare scheduled within a month	Can recare also be done today? Check insurance limitations.

Recare Opportunities (Patients on today's treatment schedule who are overdue for recare, have family members due, or have one scheduled within a month.)

Patient Name	Treatment Need	Roadblock Finance? Phobia? Time?

Do any office chores/tasks need to be completed? If so, what? Who will do them?

Specific Chore/Task	Who will be responsible for completion?

Emergency appointment times available for today? _____

DAILY FRONT DESK CHECKLIST #2B MORNING MEETING

Let's now look at the second part to Checklist #2: Logistics and Opportunities.

This information can be gathered by anyone in the office. This information varies per office, but here's a list of things to help you get started. Think about the services your practice offers and come up with your own list to present every day. This information will require that you do a little bit of research the day BEFORE the morning meeting.

Make sure to address **logistics** for the day AND potential **opportunities** at the morning meeting in addition to the actual metrics.

Logistics

- Have yesterday's lab cases been sent and marked "sent" in your lab case calendar?
- Are all lab cases in for today's patients who require a lab case?
- Which lab cases are you expecting to arrive today?
- Will any lab cases have to go out today? Are those lab slips pre-written and boxes ready in the lab?
- Is there any equipment maintenance needed for today?
- Are there any specific patient needs/requests for today?
- Will any patients require a post op phone call? If so, who?
- Will any patients require consent forms today?
- Will any patients require post op instructions?
- Will any patients require prescriptions today?
- Do any patients need to be added to marketing automations today?

Opportunities (We call this [DIGGING FOR GOLD](#). A huge part of the dental team's responsibilities is to SEEK OUT PRODUCTION in the daily schedule.

Go through the schedule for the day and answer the following questions and/or complete the task for each patient. This is where you will find additional practice production. A successful practice will do this for every single patient on the schedule, every single day. Share the answers at the morning huddle. Make sure team members are taking notes and are FOLLOWING up with this throughout the day.

1. Does each patient have a current dental benefit breakdown? If not, obtain before patient appointment.
2. Indicate patient remaining benefit max on schedule or where it can easily be seen.
3. What is patient's recent film history and current eligibility?
4. What is patient's fluoride eligibility?
5. What is patient's co-pay due today?
6. Does patient have digital photos on file?
7. If in for hygiene today, does patient have overdue treatment?
8. If in for treatment today, is patient overdue for hygiene appointment?
9. Is patient a candidate for other procedures? For example, if missing a tooth, can you discuss implants?
10. Are there family members of patients scheduled for today whom we have not seen in awhile?

Do you see how seeking out opportunity can help to increase production?

DAILY FRONT DESK CHECKLIST #2B MORNING MEETING

This list can be compiled by anyone in the office. Get the whole team involved!

What are the specific LOGISTICS that this practice should address in the morning meeting?

What are the specific OPPORTUNITIES that this practice should address in the morning meeting?

Date of completion:

Reviewed with doctor/manager:

Initial after satisfactory completion: