

# MORNING OPPORTUNITIES MEETING (MOM)

THE DAILY MEETING FOR SUCCESSFUL DENTAL PRACTICES

MOM sets the tone for the day and informs all team members about production and collection goals, as well as potential problem areas in the schedule. Moreover, MOM motivates you and your team. If used consistently and effectively, we guarantee improved performance.

## TIPS FOR A SUCCESSFUL MORNING MEETING

1. Track month-to-date goals vs. actual numbers for doctor, hygiene, and collections.
2. Track yesterday's goals vs. yesterday's actual numbers for doctor, hygiene, and collections.
3. Work out today's goal vs. projected for doctor, hygiene, and collections.
4. Determine how many major procedures are needed for the next five days. How many major procedures need to be added to stay on target/goal?
5. Determine if there are any openings in the dentist's schedule. Identify patients in the schedule with potential treatment that could be added to the schedule as needed. Other solutions?
6. Identify patients that need X-rays per treatment guidelines.
7. Note what emergency time is available today.
8. Go over financial information on the day's patients. Identify financial arrangements needed, etc.
9. New patients: Review info from telephone contact form.
10. Status and follow-up on changes from yesterday's schedule. Bring yesterday's schedule to discuss to-do's and potential issues or problems, i.e., lab cases not in, lack of inventory, etc.

MOM always starts on time. Every team member must be present. No excuses! All necessary information must be on hand. Every team member must have a copy of the morning report sheet. Anything not included on the morning report should be prepared the day before.

During the MOM, a designated team member will review the doctor's schedule with the doctor; how much time each patient and procedure requires. The entire team reviews each patient's treatment plan in an effort to avoid confusion, chairside.

Hygienists must review their charts prior to the MOM to determine who needs bitewings or FMX. Missed radiograph and treatment opportunities translate to missed revenue opportunities. The doctor is made aware of pending radiographs; re-explain any necessary treatment or direct patients as needed during the hygiene check.

The office manager/scheduling coordinator ensures that everything on the morning report is complete/updated and handed to the doctor and team at the start of the meeting. The format allows everyone to see where the office stands in terms of total production for the day and the month, the projection for the next month, and relative to last year's numbers. Also, the production is broken down per clinical provider for not only the day but for the month to date. It further shows collections and new patients for the month. Most importantly, the morning report lets you know how much you must produce and collect (daily) to meet your goals.

And what are those goals, by the way? You should review them with your team each morning during the huddle. Each month, a different employee takes a turn reading the goals and provides the group with a motivational quote. These goals and their affirmation become a part of your office's culture. Now is also a good moment to review the practice's mission, vision and culture statement. Everyone on your team must believe in them and know them cold.

These meetings are meant to be serious, but occasional levity is a good thing. Once or twice a week, hold a drawing for the staff. A team member will receive an envelope that includes a gift card and a motivational note. After the raffle, it's time to kick things off. Think sports and the team huddle before a big game. Everyone put their hands in, and an appointed staff member gives an NFL-caliber shout-out. Silly, maybe, but this enthusiasm can last throughout the day.

For you and your team, MOM can subconsciously and consciously motivate everyone to do their best. Example: If you know you are behind on your revenue goals, you will spend that extra 10 minutes with a difficult patient who needs a restoration on the lower right first molar.

These basics are enough to get you going. But don't stop with the basics, MOM can be customized to fit your practice. Don't forget, the benefits of a daily MOM require that you make this part of your diurnal routine. Make it automatic without fail. If done correctly, this simple and purposeful meeting will elevate your practice above the rest.