

# A Conversation on Staff Meetings

with **Sherri L. Henderson**

*Ideas in Practice checked in with Sherri and asked her expert advice on how to conduct the most efficient staff meetings.*



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## **Why are regular staff meetings so essential to the success of healthcare practices?**

In a typical working day, staff members don't get an opportunity to talk and communicate about important issues, concerns, and solutions. Regular meetings also give everyone in the practice an opportunity to share something positive and to be involved with solutions to problems.

## **How often should staff members meet?**

Every other week you should have a one-hour official business meeting, ideally after lunch. In addition to these biweekly meetings, you should have 5 – 10 minute briefings every morning to discuss what's happening that day.

## **Who should run the meetings?**

I like meetings to be run by different staff members each time. One person should facilitate or run the meeting, someone else keeps time, and another takes notes. This way, everyone has the opportunity to participate. The Doctor should not run the meetings; he or she should be reported to.

## **What are the most essential topics to cover?**

Practice finances (if you have an open-book policy), scheduling issues, marketing initiatives, practice or departmental goals, areas of concern, regulations, maintenance/cleaning, and clinical issues are absolutely essential to cover in at least one monthly meeting. Everyone in the practice should be at this meeting. Then the other meeting for that month can be centered around continuing education, covering things like new financial options and new technology or products.

## **What kind of follow-up should happen after a meeting?**

If you use a *promise sheet*, each

### **Promise sheet:**

A list of the promises (such as cleaning out a back closet) or tasks assigned, the due dates, and the staff members accountable for completion of those tasks.

person who is responsible for an action will have a date of completion to meet. To follow up, post the promise

sheet in a common area, ideally where you have your morning briefings. Then at the next regular staff meeting, the first topic should be a report on any unfulfilled promises.

## **How can you keep meetings on track?**

If you're prepared with a specific agenda (see below), the business part of the meeting should only take 30 minutes. Then if there's time left, discuss other things such as community happenings and vacation time. During the meeting, the person in charge of timing must keep things on track and time each speaker to ensure the meeting doesn't run over.

### **Sherri's Sample Meeting Agenda**

Month: \_\_\_\_\_ Date: \_\_\_\_\_

Meeting Topics	Maximum Minutes Needed
1. Review promise sheet from last meeting	____ Minutes
2. Each staff member shares something positive	____ Minutes
3. Review goals and projected completion dates	____ Minutes
4. Review financial report	____ Minutes
5. Review new patient/client report goal	____ Minutes
6. Review cancellation report	____ Minutes
7. Review chart audit report	____ Minutes
8. Review schedules from previous week	____ Minutes
9. Discuss supplies	____ Minutes
10. Discuss office maintenance	____ Minutes
11. Review treatments or appointment issues	____ Minutes
12. Discuss marketing	____ Minutes
13. Discuss open items	____ Minutes