

# Morning Opportunity Meeting

## Agenda

### Purpose:

- Positive start for the day.
- Get team focused on today's patients.
- Maximize productivity by identifying opportunities **NOW!**

### Requirements:

- \_\_\_\_\_ One person in charge.
- \_\_\_\_\_ Agenda filled out in advance.
- \_\_\_\_\_ All in attendance **Early!**
- \_\_\_\_\_ Short and on track (15 min).

### Results:

- What's the best thing that happened yesterday?

#### Daily Target Board Review – Recognize what is working.

- Business Team — Collections, no shows & cancellations, new patients seen, new patient calls, new patients scheduled, \$ presented, \$ accepted, Apts. sched., warranties accepted.
- Dental Assistants — Dr. production, exams, tx. plans, units of crown & bridge.
- Hygiene — # of patients seen, 4341, 4910, Fl., Oral Cancer Screening, Whitening.
- Results from asking for referrals and reviews: \_\_\_\_\_
- Doctor follow-up care calls and new patient calls completed? \_\_\_\_\_

### Plan:

- New patients scheduled for today, review NPR Form for each.

#### Same day treatment opportunities

- New patients with possible needs:
  - Restorative patients on Dr's. schedule with unscheduled treatment:
  - Hygiene patients with unscheduled treatment:
- Hygiene patients — 2 "Conversion Exams" today: \_\_\_\_\_
- Best time for emergencies: \_\_\_\_\_
- Special patient needs today: \_\_\_\_\_
- \$ Scheduled for today: Dr. \_\_\_\_\_ Hyg. \_\_\_\_\_ Potential \_\_\_\_\_
- Best patients to ask for referrals and reviews today and who on the team is going to ask: \_\_\_\_\_

### Momentum: (Build momentum for tomorrow and the future)

- \$ Scheduled for tomorrow - Dr. \_\_\_\_\_ Hyg. \_\_\_\_\_
- Openings to fill: \_\_\_\_\_
- New patients for Dr. to call: \_\_\_\_\_

#### Conclude with a positive focus: (One or more of the following)

- Review one written office goal.
- Review one item from the Office Culture Guide.
- Steve Anderson's ToPS Tip of the Day from the Morning Opportunity Meeting Action Thoughts (To subscribe email Answers@TotalPatientService.com).