

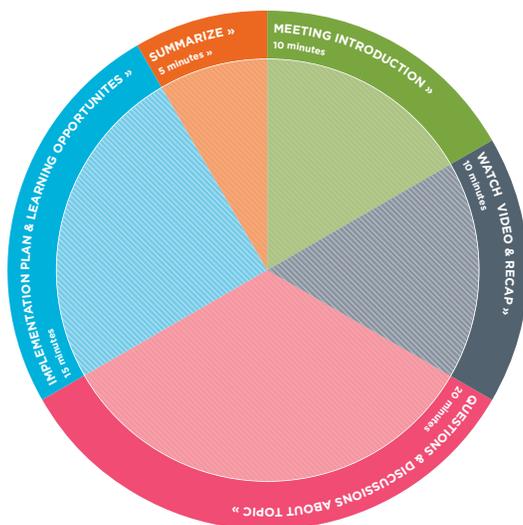
TEAM MEETING AGENDA

EFFECTIVE & FOCUSED MORNING MEETINGS

Regular meetings with your team are key to growing the practice, but they can be a challenge to organize and keep focused. In this module, learn to efficiently run your morning meetings. You'll start everyone's day on time with high energy around practice goals and caring for the patients.

RECOMMENDED AGENDA

- 10 MINUTES** Meeting Introduction
- 10 MINUTES** Watch today's video & recap key learning points
- 20 MINUTES** Questions & discussion about today's topic
- 15 MINUTES** Implementation plan & additional learning opportunities
- 5 MINUTES** Summarize & announce next module topic



SYNOPSIS OF KEY LEARNING POINTS

- A daily team meeting in the morning is essential for teamwork and growth.
- Morning meetings should focus on optimizing the schedule and improving patient relationships, care and caring.
- Prepare a day in advance for each morning meeting.
- Use the Daily Value Tracker to prepare for and guide your meeting.
- Every patient does not need to be discussed. Focus on exceptions and opportunities.
- Morning meetings should not be more than 15 minutes long.

PREPARATION

Please ensure you have a copy of the following for each team member prior to beginning the module:

- This module overview with Team Discussion Guide
- Spear Daily Value Tracker
- Spear Daily Value Tracker Guidelines

MEETING INTRODUCTION: 10 Minutes

- Reminder to turn off devices. Minimize distractions, respect everyone's time, and keep us all focused on the lesson.
- Brief Check-In. How is everyone? Anything on your mind? Express it in 30 seconds and then let it go.
- Review. Brief recap of previous meeting's goals. Review implementation progress; how are we doing?

TEAM DISCUSSION GUIDE

You may not have time for all these questions, so choose those that seem most helpful to your team. You can always discuss additional questions during another meeting.

- Review the resources included with this lesson.
- Do you think the practice will benefit from this morning meeting strategy? Explain.
- Can you give examples of situations where this strategy would have helped you with a schedule or patient concern?
- In terms of "exceptions", what do you think should be a priority focus?
- Are there any exceptions not listed in the agenda that you have to deal with regularly which your team members could help with?
- How effectively do you believe you (individually) and the team (collectively) look for opportunities to improve productivity or practice success?
- What concerns do you have about preparing for morning meetings, or conducting meetings?

- Based on your team schedule, how should morning meetings be scheduled?
- What resources do you need to prepare effectively for morning meetings?

FREQUENTLY ASKED QUESTIONS

Review the video FAQs included with the learning module.

- What kind of results should we expect from morning meetings?
- Should our work day starts 15 minutes earlier every day or we should start scheduling appointments 15 minutes later?
- What should large teams do when team members start work at different times?

NOTE: The answers of the supplied FAQs are in the video module.

ADDITIONAL LEARNING

There are a variety of course and lessons on the Spear Digital Suite that relate to this topic on teamwork, growth, performance and accountability.