

# Effective Morning Meetings

Based on Morning Huddle report from Divergent Dental (DivergentDental.com)

## Goals:

**Better Patient Care!**  
**Organize the day!**  
**Production Today & in the Future**  
**Improve Collections**  
**Build the practice!**

## Checklist:

1. Everyone reviews Daily Dashboard to understand current needs of office
2. Printed copy of Morning Huddle for each staff member
3. Each staff member takes notes
4. Patients with birthdays (most important!) **Patient info will be in bold** Everyone wishes Happy Birthday!
5. New Patients (NP); who referred them?
6. Recalls Due (RecDue); who will see they are scheduled? Can we do this today?
7. Emails and Calls ( E and C column); who will collect and enter them?
8. Family Balance > 30 days (FamBal); who will check account and possibly discuss with patient?
9. Unscheduled Procedures (UnschedProc); who will verify treatment plan and discuss with patient? (in the operatory!) Can we do this today?
10. Exam and Radiograph Check (second page); usually checked by hygienist to see the patient. Can we do this today?
11. End the meeting in 8 minutes and seat the first patient early!



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