

# ExecTech

---

## How to Conduct Great Staff Meetings

Staff meetings are valuable and can help you to:

- A. Inspire and motivate staff to do better work.
- B. Organize, coordinate and plan the week.
- C. Inform everyone of the news.
- D. Reduce discussions and meetings during the week, allowing for more production time.
- E. Observe how your staff is doing and deal with some of the problems you see.
- F. Stimulate open communication.
- G. Encourage staff to assume more responsibility.
- H. Create a team spirit.

Per questionnaires ExecTech's clients' staff members fill out, staff members dislike staff meetings when:

- They are criticized in front of the group
- The meetings turn into gripe sessions or arguments
- They have to sit through a boring lecture
- The meetings are scheduled randomly or infrequently

Therefore, to conduct a successful staff meeting, follow these six rules.

### Six Rules for Successful Staff Meetings

**Rule One.** Never criticize a staff member in front of the group. Such criticism is embarrassing to them and they will have a hard time forgiving you for it. Except for being fired or demoted, it is the number-one thing most hated by staff. There is no need for such open criticism. You can encourage improved performance in more positive ways during the meeting. Save criticism for private meetings.

**Rule Two.** You, the group's leader, run the meeting. You start it on time and end it on time. You make everyone attend. Your staff members participate as you direct them to participate. If no one takes charge of the meeting, it becomes disorganized and unproductive. If staff members start talking to each other or stray to other subjects, you must take back control to prevent wasted time. Never allow arguments or debates in a staff meeting. Cut off the dispute and take control.

**Rule Three.** Do not allow gripe sessions. Comments like, "I'm tired of the doctors running behind with patients," should be stopped by saying, "Let's not use staff

meetings to deal with negative matters. Please see me later." Keep control of the meetings, while allowing staff to participate in a productive manner.

**Rule Four.** Involve all staff. Do not allow staff members to sit and not participate. Do not give an hour-long lecture. Encouraging staff participation gets them interested in the office's success.

**Rule Five.** Never get angry or irritated during a staff meeting. You ruin morale and make the meeting into a miserable waste of time. One distempered staff meeting takes weeks of positive, friendly meetings before it is forgotten.

**Rule Six.** Assume the identity of a great leader who is competent (knows what he or she is doing) and happy. You are on stage and must give a good performance to create the proper effect. Do not appear insecure, stressed, unhappy, disorganized, flustered, upset, irritated, too eager to please, clownish or unprofessional.

## **Meeting Frequency**

Hold staff meetings every week for around one hour without fail, even if you have only one staff member. Monday during lunch is a good time as the previous week is over and the new week is beginning.

All staff members are required to attend and are paid for the time. One hour should be the right amount of time. If you complete the meeting and have some time left over, use it for staff training.

If you have more than one office, combine the weekly staff meetings each month or two for maximum benefit. In other words, have everyone from all of your offices attend the meeting at one office. Consider rotating the location.

## **Preparation**

Before starting a staff meeting, gather the following. Write the details on a copy of the "Staff Meeting Checklist" (last page of this guideline):

- A. List of problems to address and resolve.
- B. Major statistics for the entire office.
- C. News or announcements and successes of patients during the week.
- D. A list of patients or topics to discuss.
- E. Information on recent staff successes, commendable actions or production game awards.
- F. Orders and plans for the new week.

Also, inform each staff member to bring printed copies of their statistical graph(s) to the meeting and be prepared to outline their plans for the new week.

## Meeting Agenda

Do all seven steps at each staff meeting for maximum efficiency and results.

**1. Problem Solving.** Issue solutions to any immediate problems affecting the group. The purpose of this step is to quickly extinguish the little fires so everyone can focus on the meeting.

"Mrs. Jones has to be rescheduled today. Can you do this, Jane? When Pete Black comes today, no one is to talk to him about his statement except me. Put him in room three and slip me a note. Did Mary find a baby sitter? Oh well, have her bring her tribe again and I'll keep her visit short. What's happening with Joe Peterson? I didn't see him last week . . ."

**2. News, Announcements and Patient Successes.** Tell them the latest news. "We're hiring a new filing clerk on Tuesday named Jill. The janitor says we'd better quit flushing coffee grounds down the sink or else. We'll be using the new patient education video starting today."

Next, cover the successes of patients. This step is key to office morale. The doctors and some of the staff can share these successes. Do not omit this step as it helps staff realize they truly perform a valuable service to society. Their job really is more than just a job. "Mr. Johnson said he slept well last night for the first time in months." "Madge says her chronic pain is finally gone."

**3. Statistics and Plans.** During this step each staff member must show how they did last week (display their statistical graphs) and what they will be doing this new week (announce their plans).

Have each staff member show a paper copy of their statistical graphs. The lines on the graphs should be large so everyone can see if the staff member is doing better or doing worse than in the previous weeks.

Loudly acknowledge and recognize those staff who have done well. "Wow! Look at that trend! Steve's really on a roll! He got nine last week, up from seven the week before. Let's give him a hand!" Make a big deal out of these good staff. People love to be applauded and will work harder for applause than for money. Use this to your advantage.

If the staff member's production graph is going down, simply acknowledge the production and then move on. "Jim, let's see your graph. Down. Okay, so what is your plan for the week? Sounds good, but see me afterward. Okay, who is next? Sharon, how did you do?"

Staff members who forget to bring graphs should be sent to get them immediately. Soon, no one will forget. Staff who refuse to keep their statistics or do not bring their graphs may not really want to help your practice succeed and may need to be replaced.

Having staff members announce their plans for the week is extremely effective and beneficial in getting them to think like a manager, instead of just a worker. Even the lowest staff member must learn to manage themselves. "Jennifer, what's your plan for

the week?" Listen to their plans, offer suggestions or meet with them later. In groups of more than five staff it is more efficient to have the heads of each division give their plans for the week. "Michelle, what are the plans for the Patient Management Division for this week?"

**4. State of the Practice.** Announce the state of affairs and overall statistics. "Almost all areas are doing better this week . . ." "That blizzard really hurt us, we need to get this fixed fast . . ." "Our production stats are the best we've seen in months . . ."

Say it like it is. Do not explain away poor production. Do not justify down statistics. Statements like, "Well, not bad considering it rained on Tuesday," or "We tried our best," or "Collections are bad because the computer was down . . ." sets a bad example for staff and encourages them to find excuses when they do not make things go right.

**5. Announce staff accomplishments and production game winners from last week.** Loudly acknowledge things that are DONE. Start with the major accomplishments you have been wanting them to do. "Jill has finally finished fixing all the accounts!" "The office decorations look wonderful Jane. Thank you very much."

Make a big deal out of the winners of the production games or those who are getting special bonuses. "Harold made our highest ever collections this week! He gets the \$400 bonus." "Since all staff members reached their quotas, we're going to meet at Alfredo's Spaghetti House and Taco Parlor at noon tomorrow."

**6. Provide an overall plan.** Tell them what they need to do over the new week. Give them specific steps or orders to accomplish. Make sure all details are written down so you can check on them during the week.

Be firm, clear and concise: "We are closed on Friday next week, but will be open all day Saturday. This means we need to try to get all the patients rescheduled to Saturday. Alice, you will need to call the computer guy to come fix the software today. Joe, be sure to confirm those ten new patients— can you have this done by tonight? Great."

Whenever possible, give them a new production game. "If we hit our targets for the week, which is 17 new patients, \$15,000 in production and \$14,500 in collections, the office buys everyone lunch at Black Angus."

**7. Make sure staff are ready to start and get them going.** If they look sleepy or distracted or otherwise not on their toes, wake them up. Do not end the meeting until you are sure they are alert and ready to get to work. Have them do stretching exercises, touch walls, say "hello" loudly, clap their hands, stamp their feet, make noise, or whatever.

Japanese businesses place a great deal of importance on this activity. They organize daily exercise sessions, have employees sing the company song or have them chant memorized scripts as loudly as possible. It has a positive effect on the day's production.

Ensure ALL members of the group are bright and focused. If someone looks distracted or unhappy, use the momentum of the moment to quickly fix their mood. For example everyone but Jill looks good so you say, "Is everyone ready to start? Let's try that again, but louder! Is everyone ready to start? Jill! Are you ready?"

## Daily Staff Musters

You should also hold daily "staff musters" or "staff huddles" -- like a daily roll call. These meetings are very fast (no more than five minutes) and gets everyone started more efficiently than they often start themselves. Even if you have only one staff member, these meetings will save time and put you in better control.

A daily staff muster is a short version of the staff meeting. Talk quickly and with purpose, intensity and enthusiasm. You do all the talking. Announce the stats, news and plans for the day. Get staff energy up and get them started. Staff members start work faster and with more eagerness than without these meetings.

## Summary

Your odds of success are highest if you follow this format as written until you are getting the benefits a well-run staff meeting can give you.

If your staff meetings increase group morale, better organize your week and raise production statistics, you are doing them correctly.

Good luck!

---

Learn how ExecTech can help you increase your profit, reduce your stress and reach your goals. Visit [www.exectechweb.com](http://www.exectechweb.com) for more information, or contact the office nearest you.

ExecTech of Southern California, LLC  
500 North Central Ave., Ste. 240  
Glendale, CA 91203  
888-788-2777 or 818-752-8890  
888-788-7770 or 818-752-8896 fax  
[soca@exectechweb.com](mailto:soca@exectechweb.com)

ExecTech of Northern California, LLC  
21760 Stevens Creek Blvd., Ste. 100  
Cupertino, CA 95014  
800- 555-6063 or 408-253-1700  
800- 566-1559 or 408- 253-1703 fax  
[noca@exectechweb.com](mailto:noca@exectechweb.com)  
[www.exectechbayarea.com](http://www.exectechbayarea.com)

ExecTech of Florida, LLC  
2856 Chelsea PL N  
Clearwater, FL 33759  
800-340-6737 or 727-796-8000  
800-804-5420 or 727-791-1800 fax  
[fl@exectechweb.com](mailto:fl@exectechweb.com)

ExecTech of Colorado, LLC  
2 West Dry Creek Circle, Suite 100  
Littleton, CO 80120  
888-361-8400 or 303-290-9993  
888-801-1456 fax  
[co@exectechweb.com](mailto:co@exectechweb.com)

## Staff Meeting Checklist

Date of Meeting \_\_\_\_\_

**Preparation:** Before the meeting, note the problems, statistics, news and so on under the corresponding item on the agenda.

### Agenda

\_\_\_\_\_ 1. Problem solving of immediate practice situations.

\_\_\_\_\_ 2. News, announcements and patient successes.

\_\_\_\_\_ 3. Statistics of each staff member and their plans for the new week.

\_\_\_\_\_ 4. State of the practice. Overall stats and performance of the practice

\_\_\_\_\_ 5. Announce staff accomplishments and production game winners.

\_\_\_\_\_ 6. Provide an overall plan for the practice.

\_\_\_\_\_ 7. Make sure staff members are ready to start and get them going.

**Notes:**