



“THE HUDDLE”

The Huddle: The prime purpose of the huddle is for the team to know where the practice stands in relationship to monthly goals, work together to come up with solutions to get on goal when needed and problem solve anticipated problems in advance of the current day. The huddle also acts as a bridge for staff transitioning from their day to day lives to the business day. The huddle is a key practice management tool when done properly.

Huddle Report Form: A customized huddle form will be supplied to you shortly. The form is filled out each day including monthly and daily goals for the practice and each provider.

Goals: Which stat do you want to use to set monthly and daily goals for the practice and each provider: Production? Adjusted Production? Collections? What works best varies by practice. If you are not sure, we can discuss. Once you decide whether to use production, adjusted production or collections you need to determine what the Monthly and Daily Goals are for the practice and each provider.

Note: The collection goal for the overall practice is always set daily/monthly even if the providers use Production or Adjusted Production.

Set Monthly Goals: Do this by averaging out both the practice's and each provider's production (or adjusted production or collections) for at least the past three months. The same for new patients. The goals set should be at least 5%-10% higher than the averages. The new patient goal may or may not need to be targeted higher than the past three month average. You can set higher goals as long as they are realistic.

Set Daily Goal: Divide the monthly goal for the practice by the numbers of working days for the current month. Ditto for each provider based on their number of working days.

Implementation

1. The huddle is typically done, in the morning, before seeing any patients.
2. Once you smooth out the wrinkles, the huddle can and should be done in 15 minutes provided all needed data is ready prior to starting the huddle.
3. Each provider provides their previous day's stat for entry on the form.
4. The office manager or an assigned front office employee reports total daily collections and new patients.
5. The schedule and all charts need to be available for the huddle. Typically DAs and hygienists bring the following patient info:
 - a) pending treatment
 - b) pre medication info or any other pertinent medical info such as allergies, etc.
 - c) patients needing additional X-rays.
6. The huddle is run by an individual staff member each week including assistants, hygienists and associates but,

- not the practice owner or office manager. Rotate weekly through all staff consecutively.
7. The practice owner or the office manager can act as a “traffic cop” to keep the huddle moving along if needed.
 8. The staff member running the huddle fills in the form.
 9. Do not take up issues, especially any gripes or complaints, that are not on the form. If you do, you will never get through the huddle in 15 minutes.

A well run huddle is not just about goals, targets, collections, etc. It is about providing superior Customer Service.