

# SUPERCHARGE YOUR DAILY HUDDLE

by Tammy McHood, Senior Product Manager





## Learn how Dentrrix helps teams prepare for a productive day.

In football, teams begin each play with a quick huddle to communicate the team plan, team players' responsibilities, and any adjustments they need to make to be more successful. The Dentrrix Daily Huddle Report helps your office team do that the same thing.

"The morning huddle is the best way a team can feel informed, focused, and productive. If you want to deliver the very best service and care to your patients in the most efficient manner, then you and your team have to plan for the day," says Amy Morgan, CEO of the Pride Institute. "The most effective teams not only meet at the beginning of the day, but collaborate and make a specific checklist that answers all the key questions and involves everyone. There is no better solution to organizing the chaos and confusion."

To help dental offices work together more effectively, Henry Schein Practice Solutions recently released the Daily Huddle Report in Dentrrix G4 Productivity Pack 8. The Daily Huddle Report gives practices daily progress reports on monthly goals, helps team members use their time more effectively, makes it easy to access information about patients coming in for appointments today, and most importantly, helps practices improve patient care and overall business operations.

### DAILY PROGRESS REPORTS

Henry Schein Practice Solutions surveyed customers across the U.S. about their daily huddle routines. The survey results showed that while 82 percent of Dentrrix practices hold regular huddles, over 40 percent of practices have difficulty holding huddles every morning because they lack the time and/or need to gather too much information to make daily huddle meetings effective.

Cathy Jameson, Founder and CEO of Jameson Management Consulting, says, "Good meetings are a must for any business—including a dental business." Dentrrix created the Daily Huddle Report to make it easy for practices to hold daily huddles and see how they did yesterday, how they are tracking for today, and what the remainder of the month looks like.

The Daily Huddle Report gives the dental team a daily snapshot of how they did yesterday for production, collections, case acceptance, new patients, and scheduling (Figure 1). During the daily huddle, the team can use this information to discuss what wins they had yesterday and what they may want to do today to ensure they meet their daily goals. It also shows what they have scheduled for today and for the remainder of the month so they can see how they are tracking towards their monthly goals.

By having this information readily available, practices can make adjustments when necessary to meet their monthly goals instead of just waiting until the end of the month to see their final numbers. They can see what they need to do today to ensure their present and future is as productive and profitable as possible.

Daily Huddle Report						
Daily Huddle Summary						
Today is: 11/12/2009			Page: 2 of 54			
<b>Appointment Day Note:</b> This is a note to remind everyone to work on filling the schedule for next week. And it is Tina's birthday and Joy will be out of the office the whole week.						
PRODUCTION	Completed	Scheduled	Completed	Scheduled	Total	MTD Goal
	Prior Day	Today	MTD	Rem Month		
Dentist Completed/Scheduled	13,204.00	8,036.00	135,167.00	96,798.00	231,965.00	306,000.00
Hygienist Completed/Scheduled	5,104.00	3,475.00	31,530.00	29,891.00	71,421.00	100,000.00
Total Production Completed/Scheduled	18,308.00	12,111.00	166,727.00	136,689.00	303,416.00	426,000.00
COLLECTIONS	Prior Day	%	MTD	%		
Collectors (% Production)	16,304.90	69%	131,205.29	79%		
CASE ACCEPTANCE	Prior Day		MTD			
Amount of Treatment Diagnosed	30,038.00		296,836.00			
Amount of Treatment Accepted	9,210.00		74,162.00			
NEW PATIENTS	Seen	Scheduled	Seen	Scheduled	Total	%
	Prior Day	Today	MTD	Rem Month		
# of New Patients Seen/Scheduled	7	12	46	26	71	100%
# of New Patients Referred BY Patient	2	2	4	5	9	13%
# of New Patients Referred BY Doctor/Person	2	0	8	1	9	13%
# of New Patients Referred BY Marketing	1	2	13	4	17	24%
# of New Patients Referred BY all	5	4	25	10	35	49%
SCHEDULING	Prior Day	Today	MTD	Scheduled	Total	
# of Patients Seen/Scheduled	75	94	526	773	1,299	
# of Broken Appts not re-appointed	4	4	70	3	73	
Dentist Unfilled Hours	27.33	47.63	393.50	603.50	1002.00	
Hygienist Unfilled Hours	110.50	151.83	1251.83	1600.33	2852.17	
# of Unscheduled Appointments					817	
# of Future ASAP Appointments					53	

**Figure 1** The Daily Huddle Report gives you and your team the information you need to hold meaningful morning huddles.

## MORE EFFECTIVE USE OF TIME

Before the Dentrix Daily Huddle was released, team members had to manually research information about upcoming patient visits. For example, team members needed to find out if the patients' lab cases had been received, if they had outstanding balances, if they had any unscheduled treatment plans, if they were overdue for continuing care appointments, or if they required pre-meds. Some offices even researched other family members to find out if they were overdue for continuing care or if they had outstanding unscheduled treatment.

Sometimes practices have multiple team members—including financial coordinators, scheduling coordinators, hygienists, assistants, and office managers—who research the same patient's chart to gather pertinent information about that patient in order to offer them excellent patient care. The amount of time these practices spend gathering that information is astounding. The Dentrix Daily Huddle Report does all of this for the practice, freeing up team members' time while still allowing them to be well informed and prepared to provide excellent care (Figure 2).

## IMPROVED PATIENT CARE

The Daily Huddle Report helps practices provide excellent patient care by informing each team member about relevant patient information. The report can be customized to show the specific, relevant information about each team member's interactions with a patient (Figure 3).

For example, an assistant or hygienist would want to see if the patient has medical alerts or was referred to another provider at a previous appointment, and the financial or schedule coordinator

Daily Huddle Report																											
Scheduled Patients Summary																											
Appointments for Friday, April 08, 2011																											
Page: 7 of 11																											
Patient Name	Appointment Note	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	
		Lab Case	Selected Appt Status	Selected Appt Type	Missed Appt	Medical Alerts	Patient/Family Alerts	Patient Note	Birth Day	New Patients	Referred To	Treatment Plan	Unscheduled Appt	Past Due CC	Family w/o Appt	Consent Date old	Quest. Form Old	No Email	No Phone	Insurance not Bigible	No Insurance	Balance	Past Due Payment	Guarantor Note	Billing Type		
Maqueca Alcalá (Maqueca)		X	X	X										X	X	X	X	X	X	X	X	X	X	X	X	X	
Stephen Barnett (Steve)			X	X																							X
Harmont Darata (Ham)			X	X																							X
Lily Anne Darata (Lily)			X	X		X					X		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Markus Darata (Mark)			X	X							X		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Lisa Farhangli (Lisa)			X	X					X				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Annie Quigley (Annie)		X	X		X		X			X								X	X	X	X	X	X	X	X	X	X
Meredith Reeves (Meredith)			X	X								X		X	X	X	X	X	X	X	X	X	X	X	X	X	X
Begulah Smith (Begulah)			X	X		X	X		X					X	X	X	X	X	X	X	X	X	X	X	X	X	X
Eric Zabrisnik (Eric)			X	X								X		X	X	X	X	X	X	X	X	X	X	X	X	X	X

**Figure 2** With the Daily Huddle Report, team members can find the important information about the day's appointments in one place.

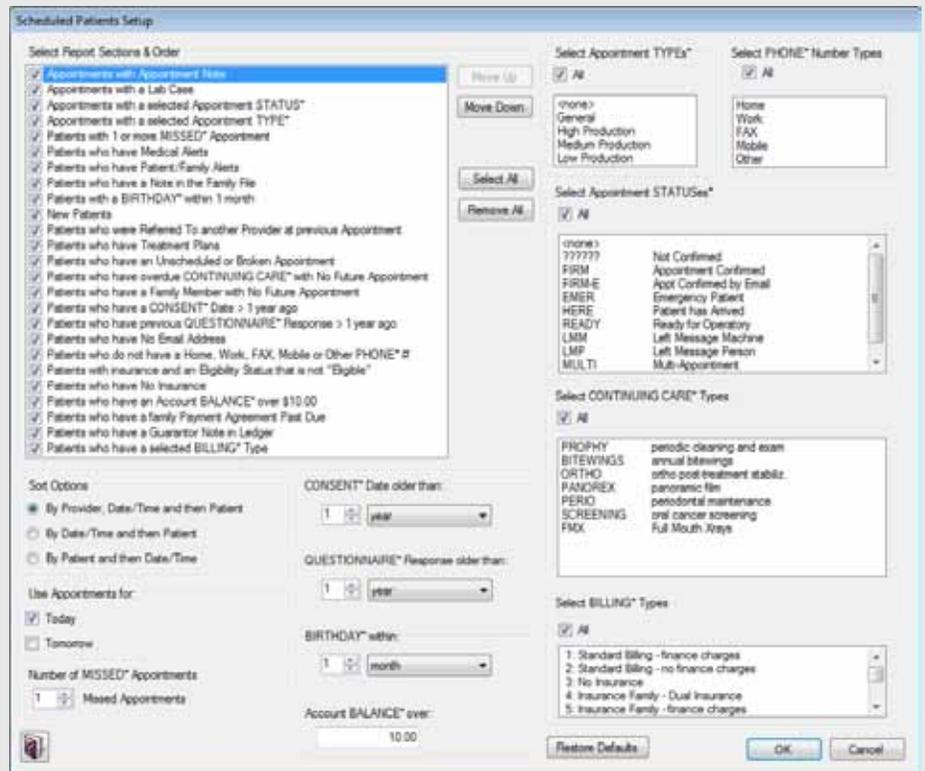
would want to see if the patient has a balance or is eligible for insurance benefits. By using the Daily Huddle Report and customizing it to the practice's unique needs, team members can improve the overall flow of information and optimize patient care.

## CONCLUSION

As the old saying goes, "If you fail to plan, you plan to fail." The power of the Dentrix Daily Huddle Report is that it enables practices to plan their days even better and maximize opportunities by placing valuable patient information at their fingertips. Dental team members are busy running a business and providing excellent patient care. The Dentrix Daily Huddle helps practices better achieve both of these tasks—and saves them time—by making all of this valuable information available with a few mouse clicks.

Gary Kadi, Founder and CEO of Next Level Practice, says, "Morning huddles are the keystone of a successful new model practice. Old model practices see morning huddles as monotonous and an intrusion on their day (and their sleep). New model team members understand that investing 15 minutes with the key business indicators is the difference between an unproductive, uneventful day and a fired-up, fulfilling day where everyone goes home winning—the patient, the team, and the doctor."

Use the Daily Huddle Report to save time, improve business operations, and make the most of your day, all while providing superior patient care. Let the Daily Huddle Report help you meet your daily, monthly, and yearly goals. **DM**



**Figure 3** The report can be customized to show the specific, relevant information about each team member's interactions with a patient.

## LEARN MORE

To learn more about the Daily Huddle Report, visit the Dentrix Resource Center and view the Daily Huddle Report webinar recording. You can also see the Daily Huddle Report topic in the Dentrix Help. See "How to Learn More" on page 3 for instructions on accessing these resources.

## Running the Daily Huddle Report

1. Open the Office Manager and select **Analysis > Practice Advisor**.
2. Click **Practice Advisor Setup** to specify how the active patient base will be calculated and which providers will be counted as dentists and hygienists, since those settings affect both the Practice Advisor Report and the Daily Huddle Report.
3. Close the **Practice Advisor Setup** dialog box and click **Daily Huddle Report** to set up the report options and run the report.
4. In the **Daily Huddle Report** dialog box, set up the options to filter this report. You can include production, collections, case acceptance, new patients, and scheduling statistics. You can also choose to include a summary of scheduled patients in a grid format, a list of scheduled patients, a phone list for scheduled patients, and route slips.
5. After you have set up the report options, click **Preview** to generate the report.