

## Clinic Director/Office Coordinator Meeting The 5 Minute Briefing

Effective practice management depends on good communication and coordination.

The problem is: who's got the time? The doctor is busy with patients and paperwork and so is the rest of the team.



As a result, the doctor is often called upon to make decisions that affect the entire clinic with too little time and insufficient information. These are often called “hallway decisions.” Sometimes they are good decisions, sometimes they are not, but they are always a distraction from patient care.

Some or all of the staff can feel left out or ignored and learn about major clinic events after the fact. This can be a factor in lowering office morale and decreasing capacity and growth.

There is a fast procedure that the doctor can use to avoid these pitfalls and improve management function and practice growth.

We call it the “5 Minute Briefing.” There is probably a better name for it, but this gets the point across. It only takes five minutes and occurs between the office manager (coordinator), where the OC informs the doctor, in the role of clinic director, what is occurring in the office.

During this time, the office coordinator briefs the doctor on vital and key functions in the office. If there are any actions the office coordinator feels needs to be taken, such as an equipment purchase or procedures change, the office coordinator can present it in writing as a proposal for a later meeting.

Keep this meeting fast. The office coordinator has to be proactive and make the meetings occur, providing the clinic director with all the info she needs to administrate the office so that her entire focus can be on patient care for the rest of the day.

Other meetings, such as staff meetings, morning case management meetings, and marketing meetings, are done at another times.

Here are the steps to take:

## Clinic Director/Office Coordinator Meeting Checklist The 5 Minute Briefing

Initiated and moderated by office coordinator.

- \_\_\_\_ 1. **Schedule.** Set time of meeting.
- \_\_\_\_ 2. **Meet with doctor.** (This is up to the staff member, not the doctor. Make it happen!)
- \_\_\_\_ 3. **Numbers.** Brief doctor on key office numbers (Practice Scorecard): e.g., new patients, office visits, collections.
- \_\_\_\_ 4. **Current Events.** Brief doctor on any staff, office, or management issues, good and not so good.
- \_\_\_\_ 5. **Progress Report.** Report on doctor's concerns, tasks, or ongoing projects from last meeting.
- \_\_\_\_ 6. **Proposals.** (This occurs only now and then.) Review past written proposals, present new ones, as needed. (Note: a proposal is a solution to a practice problem with all the information necessary to make it self-evident so the doctor can easily give his approval.)
- \_\_\_\_ 7. **Doctor's Concerns.** Ask doctor for any new concerns or questions she has. Write these down for future follow up.
- \_\_\_\_ 8. **Schedule next meeting.**

That's it.