



CLASEN CONSULTING

THE ANNUAL RETREAT
THIS MAY BE THE PERFECT TIME

JANUARY 2021

As 2021 begins and my in-office visits resume, I have discovered that team meetings have gone by the wayside. This refers to all types of meetings, including The Morning Huddle, The Monthly Planning Meeting, and the Annual Retreat.

The Morning Huddle has been skipped by a few clients because there have been changes in staff and/or schedules. In the past the team started the day together, but more recently due to Covid issues some have a staggered schedule to prepare for the day and they feel that if the entire team is not available for the briefing, it may not be of value.

Monthly Planning Meetings have been non-existent as the doctor and the team struggle to find the energy to plan and facilitate a positive session. In addition, team members may have been out of the office due to illness and this added further strain for those covering their positions. Lastly, goals have been postponed, as practices have simply made every effort to manage an ever-changing schedule and patient concerns.

While getting off track is certainly understandable, I hope you will make every effort to resume these meetings in the near future, especially if you found them to be beneficial in the past.

The one meeting I would like to address, however, is the Annual Retreat. It may not be possible to consider this meeting early in the year, but if you consider it during the first quarter of 2021, it could be beneficial.

- The Annual Retreat is usually scheduled for a full day and it is best held someplace other than the office to avoid distractions. A half day is advisable, if you have not held an Annual Retreat in the past.
- Preparation is recommended to have a well-organized meeting that makes the most of the topics and the time.
- Here are a few topics you may find motivational, positive and productive:

- Begin your meeting with a short video everyone can relate to. Ted Talks has several to choose from and should you need assistance, please contact me for ideas. This should be inspirational, positive and motivating to kick off your session.
- What positive changes did you find in 2020, in spite of the Covid pandemic that you will now incorporate in 2021?
- What systems and protocols should you return to? If hygiene time has been extended, what is necessary to return to one-hour visits?
- What current challenges does each department still face?
- Take time to discuss verbiage for difficult situations with patients.
- Update on all PPE standards for the near future.
- If you have new team members, take time to review your practice philosophy and service standards. This will not only serve as orientation for new team members but will also be a great review for existing team members and it will serve as a positive reminder of your practice purpose.
- Review your new patient experience, verbal skills and systems, especially if new team members have joined you.
- Review dental procedures that may be new to team members, so they are comfortable answering patient questions. It is ideal to role-play how you will explain the value of a procedure to a patient.
- Consider setting goals for 2021. You may remain conservative this year and keep the goals the same as 2020.

Above all, take time to celebrate the wonderful team effort you all put forward this last year. The challenges were immense, you stayed strong and your practice benefited.