

The 5-Minute Briefing – Doctor/Admin Meeting

It is 7:15, and the doctor comes to the office for the 8 am scheduled patients. It is a new day to help more people become healthier.

What a fantastic opportunity!

Except, too often, the doctor comes in with their attention on administrative concerns. They may wonder about collections, how many new patients for the month so far, how well a promotional program is going, or why the garbage didn't get emptied.

For the office to do well, it needs doctors who have their attention on patient care so that the whole office generates a "healing" atmosphere.

But what about all the administrative details that go into supporting patient care? The doctor as the business owner and CEO must also think about these, right?

Yes, of course, but NOT during patient care hours. We do not want the doctor to be concerned about administration while seeing patients. We don't want them making "hallway decisions" on management or marketing while seeing patients. They can schedule other times to do management and administration.

The roles of doctor and clinic director/CEO need to be separated.

An effective procedure to help with this is the "5 Minute Briefing." It only takes about five minutes. During this time, the manager briefs the doctor on the office's vital functions. The doctor then tells the manager their concerns or questions, which will be followed up with information or solutions at the next briefing.

Keep this meeting fast. The manager must be *proactive and make the meetings occur*, providing the doctor with all the info they need so that they can just put their attention on getting people healthier.

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

The *5 Minute Briefing* helps the doctor and office stay Goal Driven!

The 5-Minute Briefing

Clinic Director/Practice Manager Meeting Checklist
(Sample. Adjust as needed.)

This checklist is assigned to the admin assistant or manager.

Purpose: To help the doctor stay focused on patient care during patient hours, free of administrative concerns.

- ___ 1. **Schedule.** Set the time of the meeting. (Usually, before the day starts.)
- ___ 2. **Meet with the doctor.** (*This is up to the staff member, not the Doctor/Clinic Director. Make it happen!*)
- ___ 3. **Numbers.** Brief doctor on key office numbers (Practice Scorecard): e.g., new patients, office visits, collections. (Give them the relevant data.) This shows how well we are progressing towards our goals and mission.
- ___ 4. **Current events.** Brief the doctor on any *important* staff, office, or management issues, good and not-so-good.
- ___ 5. **Progress report.** Report on doctor's concerns, tasks, or ongoing projects from the *last meeting*.
- ___ 6. **Doctor's concerns.** Ask the doctor for any new concerns or questions they have. Write these down for future follow-up. Don't skip this step! Take admin tasks away from the Doctor/Clinic Director! The goal is to let the Doctor/Clinic Director be a Doctor/Clinic Director, not a manager.
- ___ 7. **Schedule the next meeting.**

That's it.