The *5 Minute Briefing*: CEO/Admin Meeting

It is 7:30, and the Doctor/Clinic Director comes to the office. It is a new day to help more people become healthier.

What a fantastic opportunity!

Except, too often, the Doctor/Clinic Director 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/Clinic Directors who are focused on patient care and who are happy so that the whole office generates a “healing” atmosphere.

But what about all the administrative details that go on that support patient care? As a business owner and the CEO, the Doctors/Clinic Director must also think about these, right?

Yes, of course, but NOT during patient care hours. We do not want the Doctor/Clinic Director 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/Clinic Director and practice manager and CEO need to be separated.

An effective procedure to help the Doctor/Clinic Director stay focused on patient care is a 5-minute briefing between the Doctor/Clinic Director and their administrative assistant or practice manager.

We call it the “5 Minute Briefing.” It only takes about five minutes. During this time, the team member briefs the Doctor/Clinic Director on vital and key functions in the office. The Doctor/Clinic Director then gets to give the admin assistant or practice manager all of their concerns or questions, which will then follow up with information or solutions at the next briefing.

Keep this meeting fast. The admin assistant or practice manager must be *proactive and make the meetings occur*, providing the Doctor/Clinic Director 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 other times.

The *5 Minute Briefing* helps the Doctor/Clinic Director and the entire 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/Clinic Director stay focused on patient care during patient hours, free of administrative concerns.

1. **Schedule.** Set time of the meeting.
2. **Meet with the Doctor/Clinic Director**. (*This is up to the staff member*, not the Doctor/Clinic Director. Make it happen!)
3. **Numbers.** Brief Doctor/Clinic Director on key office numbers (Practice Scorecard): e.g., new patients, office visits, collections. (Give him the relevant data.) This shows how well we are progressing towards our goals and mission.
4. **Current Events.** Brief Doctor/Clinic Director on any *important* staff, office, or management issues, good and not so good.
5. **Progress Report**. Report on Doctor/Clinic Director‘s concerns, tasks, or ongoing projects from the *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/Clinic Director can easily give his approval.)
7. **Doctor/Clinic Director‘s Concerns**. Ask the Doctor/Clinic Director 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.
8. **Schedule next meeting**.

That’s it.