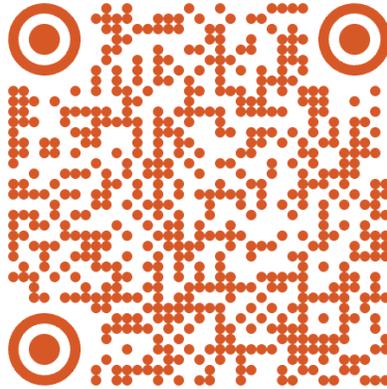


PPA Podcast



August 13, 2025

Back to School With Meetings: How to Run Them Efficiently and Effectively

Transforming "Meetings" Into "Structured Communication"

Prioritizing Preparation: Valuing Making Your Work Better BEFORE It Has to Be Done

Creating Purpose in Real Time and Honing the Habit of Huddles

The Practice Profit Accelerator is where we dive deep into the most pressing questions we're hearing from teams across North America.

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Kevin: Good day everybody. Welcome to the latest episode of the Dental Success Today Practice Profit Accelerator Podcast. The formal and official welcome, Mr. Scott Manning.

Scott: Kevin, DST Universe and family. So happy to be with you. Really looking forward to this. This is our halftime rally cry, and it's just the mid month. We just like to keep you fired up As the old saying goes, Kevin, motivation is temporary. That's why you got to get daily doses often. And more importantly, we just want to acknowledge all the great work, the life-changing impact, all the things you're having on other people. And we want you to know that we're here today to give a little of that love back to and to make sure that you're staying sharp and on your game and you don't take it lightly, that you got to be filled up and refocused and all those things too.

Kevin: Yeah, I love it. And I'm excited for today because as you know, we're at that time of the year where we find ourselves in the back to school spirit. So I say this, Scott, why don't we sharpen our pencils and get to work on an all important topic, which is meetings, and specifically my friend, how to run them efficiently and effectively and maybe just maybe we will actually look forward to them once we prove we can do them well. What do you think, my friend?

Scott: That's great, Kevin. Yeah, we'll talk about that and so much more. But yeah, I love that, Kevin. What I'll tell you this is here's what happens. People wait until it's too late until they're looking in the rear view mirror. They're trying to fix yesterday's problems before they want to communicate, they want to talk, they want to have meetings. And I think the whole reason why, it's kind of funny, because there's exactly what we're going to talk about. The whole reason why people resist the meetings is because the meetings don't have any meaning, the meeting without a meaning. And if you do that, who's going to look forward to it? And therefore the substance ends up being about complaints and what's wrong, and it's at best constructive criticism. And so it's just sort of daunting. So what we call meetings more importantly is structured communication. It's literally schedule bound flow of communication.

You would have your patient call, fill out some stuff, show up, go through what a certain process in a certain order with each part of it containing something of significance, and you wouldn't get anything out of order. You wouldn't just skip parts, you would never under-do any one stage of it. And so we don't apply that same intentionality to how we communicate, how we work together as a collaborative team. And so therefore, pick any word you like, rally gathering, huddle meeting, whatever. This is just the simple concept of structured communication with a purpose, and that helps you do everything forward at a better, higher level. And I would just say, Kevin, this is, there's probably nothing as a group of people that can make somebody more proactive than reactive, than proper preparation time to do it and meetings to plan it out. So that's what I would just sort of set the tone and then I'll let you could say whatever make more sense out of what I just said.

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Kevin:

Yeah, well, listen, I love how you are putting the thing that for some people you simply just have to use different language, different verbiage. You guys all know that we talk about it extensively, obviously, of course, when it comes to our patient care to get them to be able to see their health in a different way, well, it's important for us as a team to be able to see it in a different way too. So if meeting gets everybody down just by using that one word, well, like Scott said, the whole point of getting together is to communicate effectively why, so that we're all in the know. We all get the opportunity to be able to have questions answered that are going to help us to perform at the highest level possible and to be able to celebrate a lot of the things that are happening.

Because let's face it, we don't get together often enough, and we definitely aren't in the same rooms together to be able to hear all the wonderful victories that are going on. And let's face it, who doesn't want to hear the good stuff? And so the key on the deal that where Scott's going with this is it's important to carve out specific times to communicate uninterrupted keyword, uninterrupted, no phones with you, no busy work with you, be present. And then that's how you're going to have efficient and effective meetings because everyone's paying attention, everyone comes prepared, and then this way you are heard. And that's definitely something that's, and in the end, as Scott was alluding to, and you'll get into the preparation piece is so key because we want to not have to always rely on others to come with the brilliance, others to come with the solutions. We want to be able to have that opportunity ourselves. And the only way to do that is to be thoughtful and observant and then bring good high quality information that everybody can benefit from. Scott, let's keep moving along on this one.

Scott:

Hey, Kevin. Thanks. Thanks so much. So team, let's see if we can make this super tangible. I think Kevin just laid the gauntlet. He created the mission, what success looks like, et cetera. So here's what I want to say. Okay, I want you thinking daily, weekly, monthly, and then I want to bonus the best teams with quarterly. So we're going to just make this specific. Remember, you're not asking are we, or what you're asking is what does better look like? How can we up-level our game, whatever. So first of course, it's going to begin with your attitude, which is kind of what we just said, prioritize and value preparation. Okay? That's the most important aspect of the whole deal, is that if you don't value it, and I use this analogy, Kevin knows all my goofy analogies, but at our advanced training last week, I said, imagine every day you're chopping down trees.

That's what you do sooner. Patients, you can come up with a better analogy for sure, but every day and every day it gets a little bit harder, a little bit harder because the ax gets dollar and dollar and dollar and then pretty soon you get tired or fatigued. The ax breaks like every day. That's what we're doing. We're going through the same motions, but it's only if we stop sharpen it, we refuel, we get back on our game plan and everything then becomes seamless. And so what happens is most people don't pay attention to preparation until they have basically gone off the rails. It's like they're frustrated, they get disenchanting, they're a little tired, they're not looking

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Scott:

forward to coming into the office tomorrow, and then eventually somebody bursts or we have a bad month. That's usually how it smacks you in the face and they're like, oh, yeah, that's right.

We ain't been doing that. Or, oh, well, yeah, we kind of knew that two weeks ago, but we were paying attention. And so that goes back to what Kevin and I talk about every single month is mission or motions, which one are you doing? And so you have to understand, it all comes back to prioritizing preparation, the mindset and the attitude of valuing, making the work better before the work has to be done. That's the deal. So first, daily we understand the morning huddle. Everybody knows. Now there are rules about this. There's rules of engagement, a standard of excellence obviously on time, but not just on time, but prepared, not just on time and prepared, but prepared with what. And mostly what we want to know is if for the patients who we're there to serve is what are we doing to move this patient forward on their pathway to health?

What are we doing to make an impact? I'm not going to go through 16 different specialty examples, okay? It's a simple question where that patient's at in your life, what are you doing to up-level them, to enhance them, to move them down the path? It might be more execution on various treatments or quadrants or arches or it might be aligners or appliances or it might be injections or aesthetics. It might be just post-op testimonials, reviews and referrals. But it's a simple point, and so everybody needs to know this. So that's sort of like stream number one, know thy patient, what's the objective of the visit today? Not the procedure, not the appointment, but the patient's experience with you. Where are we going to take them? That's a strategic discussion. If there isn't an expected clinical yes on something, then you don't know what the reverse engineered action needs to be in the operatory.

Of course, you're still going to customize to be engaged. The second stream, of course, is the new patients. That's the obvious one, talking about these people in the huddle, but most importantly, making sure everybody's on point. The thing that's most missed if you have a traditional practice with hygiene or you have a specialty practice with follow us post-op supplemental treatments, et cetera, is that you look across column, we build schedules down column, but we execute schedules cross column. So in the morning holiday, just making sure that it's going to be seamless flow. The second part of that, so opportunity number one, seamless flow number two. The second part though is really, really important. Is the business team dialed in and aware in advance of the day beginning where they're going to be needed as the clinical team making a full on commitment with the business team when they're going to be executing treatment summary triangles of trust either upfront, either in the operatory or bounce backs into scheduled appointments, decision visits, et cetera. So this is all game planning. This is fun shit, okay, this makes your day better, but it makes your impact greater, it makes your stress less, and it gives everybody that purpose. We were talking about literally in real time on the field end of day, again, end of day, whoever's available, the more the better.

Some is better than none, all is better than some, and we're just closing up the day. It's a simple concept. Mostly it's patients reappointed, it's treatment

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Scott:

closed, it's next visits. It could be care calls on procedures. It could be referral follow-ups on specialty patients. It could be next visits in terms of we need to get somebody back, or we're working out financing or we need somebody to call because they weren't clear on their treatment. This is all very important. Now, I want to pause. The second aspect of this structured communication that all has to do with playing the game at a higher level is that weekly checkpoints. Now, we want you daily to look at the future. Every day you're looking one week, two week, three week, four weeks, but not every team member, right? There's going to be certain people, treatment coordinators, of course schedule, it queens, of course the clinical leads, of course, you're going to always be looking out to the next open opportunities because that's the only way you're continuing to build on principle.

This is back the basics on principle, but really weekly. Weekly is last seven, next seven. And we're really talking about how do we do? Where are we at a week in the month? Then we'll say next seven, where are we at? Anything that needs to be adjusted, modified as we head into this upcoming week. So you have to develop this. Now in a state of ideal, if you've got a team of less than five people or six people or eight people, the ideal would be to have everybody together that if you have 8, 12, 16, 20, the more, if we go up by fours, you're probably going to have a representative. And those people are going to keep their finger on the pulse, their eyes on the future, and they're going to be visualizing success going forward. So these are the dailies and the weeklies. And I will just tell you, and I'm going to let Kevin back in here for this part because this is preparation for real time plays.

We're going to talk about the actual meetings, which you would think more of as bimonthly or monthly or whatever, but the things that are going to make your daily life better, the things that are going to make your patient acceptance greater, the things that are going to help you win never before. It's the daily disciplines and the weekly accountabilities. It's building habits into not are you doing huddles, but what's the outcome of these huddles? How are they up-leveling your day? Are you doing end of day debriefs? But what are the results? What data is gathered, information is secured, how are we using that to stay on the same page with each other? And then weekly is probably the most missed point, and it's like you never stop and see where you've come from and where you're going. It sounds common sense, but this is so critical because it is the definition of working smarter, not harder, of looking for leverage and of refining because you can rinse and repeat everything, but that's going through the motions when you're doing it at low level. But when you've got anchored benchmarks and time structure to communicate and to check in, that is rinsed repeat at the highest level, and it allows you to do it where it's not, I'm going to say easy, but to use one of Kevin's words, it's simple. When it's simple, it's successful. So Kevin, I'll throw it all back to you here on our first chunk of communication time and meetings.

Kevin:

Yeah, I love it. And I'm going to take a little bit different approach than Scott because you covered that aspect of it so well, and team, go back, listen to that because it's the roadmap with regards to how you can identify all the opportunity that exists and communicate it well amongst each other

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Kevin:

regarding patients, keep moving them along because let's face it, I know that everybody's frustrated when patients don't move along. And anything that we can do to make sure that we're all connected and all informed with regards to each and every patient to try to be more influential than ever before to get them to move is wonderful. Now, I'm going to add two different pieces, not add as in more per se. It's with regards to the spirit of the times that you're together. And it can be morning, afternoon, weekly, monthly, it doesn't matter what.

It's the first one is this. I think it's important for each of your teams to identify what do we need to be reminded every day, not take for granted, be reminded. One of them is this, friends, I know that we do this every day, all year long, and we do it at a very fast pace. And so I want to make sure before we break and get started with patients today, we have the lives and health of patients in our hands, and we could make someone's date today. So I want you to remember that instead of having to hear us say it, or maybe you say it when you get together on an annual or a biannual meeting or something of that nature, there's a little bit more of that type of message that will come across is just that simple reminder. Another really great reminder is to say, team, we're our work family, and just like every other family things can happen.

So let's all remember our agreement that we're going to think the best of each other, that we are going to do all we can to help and support each other. We are going to set each other up for success. Let's be mindful of that. And then when you think from a frustration standpoint, one of the things that I like to spend the most time on when I'm talking about time together is specifically the complaints that come up on a regular basis that are literally daily we're ignoring because we're just simply trying to figure it out. The two that come up most often. And so here again, reminder, if you're not doing it, then it would be new is, Hey, doctor, assistant clinical partners, where do you want me to put an emergency today? Rather than just someone on the phone throwing somebody somewhere hoping they did a good job, and then everybody complains about it.

And what does complaining do? It distracts us from the mission. It distracts us from the conversations we're supposed to be having with the patient because we're all bent out of shape ourselves about what just happened. The second one is, where could we place some same day treatment? There's many doctors who want to get started today, and this applies and obviously traditional as well as specialty work. And so you want to be observant of that. If there's these constant complaints, then we have to say, okay, well what can we do to fix them on a daily basis rather than have them keep coming up and do nothing with them? Because then you're not setting yourself up for success and you're actually basically predicting the future, which is some patient or patients are going to be disrupted because we weren't prepared to be able to call the audible using football analogy for when is most appropriate. And friends, we have control over that, and it's our responsibility to protect each patient's opportunity to have the best experience possible that you guys deliver. And so Scott, I really wanted to go there because I think it's important to remind ourselves as a team, remind ourselves as people, individuals, and

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Kevin: then why on earth do we even exist today? And then to be prepared to handle those daily frustrations that we know are coming and we could handle 'em better if we actually talked about it.

Scott: Well, Kevin, thank you so much and a great job covering really always the more important matters. And I think what I'll say is we probably need to shove the other stuff to the future, but I would say this, the other aspect that in terms of where we hear the biggest frustrations both from team members and doctors, is if you're going to run any sort of meeting, everybody has to participate and nobody wants to sit there and be lectured. We have obviously literally the best in the world training, support, coaching and personal development. Quite literally, it's the best in the world, not even close. But the reason why people love it so much is because it's interactive. It's because that we make you think for yourself, embrace your personality. We don't try to change you put you in a box or a mold, and so in a team environment, you have to embrace a team of experts, a team of leaders, a team of specialists at what you do.

And if you want that kind of respect, if you want that kind of stature and growth potential, speaking to every team member on this meeting, you have to show up with substance to share. You have to give and receive feedback and be a valuable, integral contributor and creator within the system. So that's all these points, Kevin. Approaching the patient side on the team side is so critical. Morning huddle, end of day, weekly check-in. The last two things I would just quickly comment. I think Kevin should be a great deep dive and we can do back the basics from like, okay, reading, writing, and arithmetic. What Kevin and I felt was most important here is you know what to do, what to study, how to execute even to win, but is the structure in which you do it and do it in a proactive way that allows you to tap into your greatness to better your best.

So the second part is what are you doing to grow your skills? To do role play practice reps to really continue to refine and keep your own development at the top of your mind every two weeks or twice a month is really the minimum. A lot of people have monthly team meetings. The challenge with the monthly team meetings is it ends up being an administrative roll call. We're going down a checklist of bullshit that technically everybody should already know along the way or we're doing in-services with training equipment or software and what we're never talking about each other. We're never talking about how are we going to win the next 30 days. That's why our four simple questions are, what's going well? What could be better? What questions you have For me, what decisions do we need to make is vital because it's positional ownership.

Everybody has a voice. Every aspect of the practice is represented. So we want you to set at least twice a month, one where you can deep dive dental success content, which is the best you can get anywhere because it is not only going to feed your mind, going to feed your soul, and you can talk to each other about it so that you make yourselves the patient. So that has to happen and you're getting live video practice focus trainings from me every month.

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Scott:

That's one meeting for those of you new to our family, you're getting very specific laid out modules to execute on. You of course have weekly motivations with Kevin's leadership and Megan and i's Monday huddles. Your doctors have a whole bunch of other stuff. Okay, so the second meeting every month is actually state of the union. Where are we? How do we stack up on our goals? That's 20% of the meeting. I'll repeat 20%. So you want to take 60 minutes at best it's 15 and it'd be better if it's 12. The rest of the meeting is all about where do we go from here? What do you need from me? What is on the books for the next 30 days that we need to pay attention to and be aware of? Are we setting ourselves up for success? So one is consume content and better your best and develop yourself, make your team each other and you individually the patient.

Then the other is treating this, the business that it is and saying State of the union, where were we? Are we going? And every month you just cycle through and rinse and repeat this structure and it will keep you prepared, organized, disciplined, focused, and above all else proactive so that you are constantly creating your futures instead of triage in your past. I'll just stop right there and I think Kevin, next month happens to be the quarterly shift. So maybe we'll tie in our quarterly goal setting and practice review and we can teach people about this 90 day, which you created so long ago, the 90 day mentality around convincing a year of progress in 90 days and having accountabilities and check-ins. So I'll throw back to you, Kevin, to kind of tie this up with something tangible and we can have our team send out some really cool things to remind people of what they have available to themselves to win the day, crush the week, stay on track for their months and keep bettering their best with themselves.

Kevin:

Yeah, I love that. And it's nothing more for me here. I want to wrap this up and be very clear about where you were going with this, Scott, which is this, friends, whether you're getting together for five minutes, 15 minutes, a whole day, anywhere in between, you have to make certain that you are protecting the content of which you are discussing, that you are bringing, that you are listening to, watching whatever the case is. So if it's training, sure that you're doing high quality stuff, not just stuff to fill the time. If you are having people come prepared, make sure very specifically you're telling them what they need so that they actually come with it, rather than just say, come to the meeting and tell us, give us an update on what's going on. Let's be more specific than that because here again, the content matters.

Outside source content matters, internal source content matters. And so I just don't want you to lose that specific piece of it because otherwise, that again, is what gets people frustrated is like, well, we get nothing done in the meeting. Then the final point is this, and then we're going to wrap this up, is that there has to be somebody who is managing the meeting. We can't let conversations go off the rails. We can't let it become irrelevant to what it is that we specifically came there for. We've got to own it own just like anything else, so that we do look forward to it. We do believe they're productive, and we can actually see tangible results. Scott, final word before I wrap it up.

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Scott: Kevin, there are the three types of people. There are people who sit around, oh, I'm going to get it messed up. I can't think of it now. Damn. I was going to tell a funny joke. I just screwed it up. It was something like this, okay? There's people who, they wait for things to happen. There's people who go make things happen, and then there's people who just stand around and say, what the hell's happening? So I just want to say we just outlined today for you how to be the make it happen people and that staying ahead, not behind controlling your future and not being at the mercy of circumstance or of your past. So as always, Kevin, thank you so much for up-leveling this and giving people something amazing to do. All these principles apply to your life, not just your practice, and we're here for you 360 degrees, okay? In and out both.

Kevin: Thanks Scott. Alright everybody, thank you for listening in on another episode of the Dental Success Today Practice Profit Accelerator Podcast. Get those pencils sharpened, make it a great month. We'll be with you again soon.