"I Hate Morning Huddles!"

Putting the X-Factor on Your First 15 Minutes

by Tanya Bailey

TOPS Total Patient Service Institute

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Tanya Bailey

Practice Advisor

Tanya Bailey is a powerhouse in the dental industry, combining her expertise in patient engagement, team training, and practice growth to deliver remarkable results.

Tanya's passion lies in helping doctors and their teams create an environment where patients feel valued, and practices thrive. Whether it's scheduling first-time patients, navigating complex treatment plans, arranging financial solutions, or filling the schedule, Tanya knows how to turn challenges into opportunities.

What sets Tanya apart is her ability to do more than tell teams what to do—she shows them how to succeed. By organizing, modeling, coaching, and supporting teams, she ensures they have the tools and confidence to implement ToPS (Total Patient Service) skills effectively. Tanya works directly with patients in real-time, demonstrating how to achieve success in each unique environment.

Her dedication to excellence and "never say never" attitude have earned her recognition across the dental community, including being named the Crown Council's "Administrative Team Member of the Year".

With a Bachelor of Science in Business Management, over 15 years of experience in practice management, and recognition as a past Certified Dentrix Trainer, Tanya brings a wealth of knowledge and a dynamic approach to every practice she works with. She is also a Certified John Maxwell Team Leadership Coach and Trainer, equipping her with proven strategies to inspire leadership and personal growth within dental teams.

"If you want an inspired team driven to achieve excellence, I'm here to make it happen. Together, we'll take the next step toward your vision of success."

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Putting the X-Factor on Your First 15 Minutes

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Scan here

For the session materials.



"Huddle"

- Rushed
- Command and control
- No input from the team
- Focus on execution of the task
- One person calling all the shots

"I Hate Morning Huddles"

- Late start
- Negative attitude
- Complaining
- Runs over…Patients seen late
- Same problems…nothing changes.



M.O.M.

Morning

Opportunity

Meeting

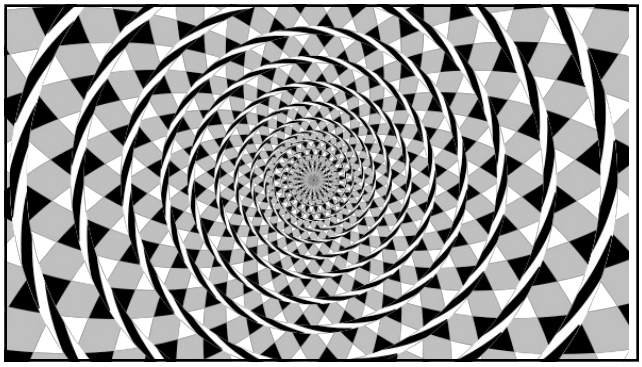
Opportunity:

- Same-day treatment
- Total Patient Service
- Anticipate needs
- Produce more than scheduled
- Same-day emergencies
- Scheduling unscheduled treatment
- Get the entire team on the same page
- Focus on service values and delivering on the promise.

A.A.A.

- **A**ttitude
- **A**ccountability
- **A**genda

Attitude



You're On Stage

Leading the Meeting

The spirit of an organization is created from the top. If an organization is great in spirit, it is because the spirit of its top people is great. If it decays, it does so because the top rots.

Peter Drucker

Beginning

What's the BEST thing?

Concluding

Action Thoughts

Accountability

Early!

When you're **early**, you're **on time**.
When you're **on time**, you're **late**.
When you're **late**, you're **lost**!

1 person in charge:

- Prepared
- Prompt
- Progressive

Business Team:

- Schedule
- Financial Chart Prep
  - A/R
  - Insurance

Dental Assistants:

- Unscheduled Treatment – restorative patients.
- Lab cases
- Pre-med

Hygienists:

- Unscheduled Perio Treatment – hygiene patients
- Unscheduled Restorative Tx – hygiene patients

Agenda

Purpose?

- Strategy & Action Plan.
- Produce more than scheduled.

Agenda

- Results from **Yesterday**
- Plan for **Today**
- Momentum for **Tomorrow**

Results from Yesterday

2 Results:

- What's the best thing that happened yesterday?

Daily Target Board Review – Recognize what is working.

- Business Team — Collections, no shows & cancellations, new patients seen, new patient calls, new patients scheduled, $ presented, $ accepted, Apts. sched., warranties accepted.
- Dental Assistants — Dr. production, exams, tx. plans, units of crown & bridge.
- Hygiene — # of patients seen, 4341, 4910, Fl., Oral Cancer Screening, Whitening.

- Results from asking for referrals and reviews:_____
- Doctor follow-up care calls and new patient calls completed? _____

Plan for Today

3 Plan:

- New patients scheduled for today, review NPR Form for each.

Same day treatment opportunities

- New patients with possible needs:
- Restorative patients on Dr's. schedule with unscheduled treatment:
- Hygiene patients with unscheduled treatment:

- Hygiene patients — 2 "Conversion Exams" today: _____
- Best time for emergencies: _____
- Special patient needs today: _____
- $ Scheduled for today: Dr. _____ Hyg. _____Potential _____
- Best patients to ask for referrals and reviews. Who will ask? _____

_____

Momentum for Tomorrow

4 Momentum: *(Build momentum for tomorrow and the future)*

- $ Scheduled for tomorrow - Dr. _____ Hyg. _____
- Openings to fill: _____
- New patients for Dr. to call: _____

Conclude with a positive focus: (One or more of the following)

- Review one written office goal.
- Review one item from the Office Culture Guide.
- Steve Anderson's Morning Opportunity Meeting Action Thoughts (Subscribe at www.TotalPatientService.com).




Supercharge Your Morning Meeting!
SCAN ME
Sign up to receive Morning Opportunity Meeting Action Thoughts!
T2PS


You Know What Needs to Change.
Now Let's Change It.
Choose the support that helps you turn today's ideas into lasting results.
SCAN ME
Virtual Coaching
Personalized, one-on-one coaching designed for your practice's unique needs.
In-Person Training
Empower your team with the skills to boost patient satisfaction, production, and long-term loyalty.
Don't just go back to the practice.
Go back with a plan.