When was the last time you had a truly productive team meeting in your orthodontic practice? Have you stopped holding regular meetings because nothing ever seems to change?

Through comprehensive study of the most successful companies on the planet and how they embrace team meetings in order to quickly clarify miscommunication and realign the entire company on the same page so that their front-line employees can produce results for the customer, Dr. Dustin Burleson has distilled *7 Keys to Productive Team Meetings* in this special report.

Inside you’ll discover practical templates and takeaways from business management leadership and research produced by Cameron Herold, Ken Blanchard, Dr. Paul Hersey, and Verne Harnish so that you can transform your team meetings from mediocre to one of the most valuable elements of your practice.
The Burleson Files are the notes, reading lists, articles, journals and general database that Dr. Dustin Burleson studies to produce the World’s #1 Orthodontic Practice Marketing Newsletter. Published for over 2,000 clients in 24 countries, Dr. Burleson’s practice management and marketing content is derived from extensive study and dedication to the pertinent news and how it might affect your practice.

Dr. Burleson reads five newspapers daily and more than 30 journals a month and has read a book each week for over seven years. He publishes five monthly newsletters and writes a consistent stream of articles and books for the orthodontic profession and patients. His exclusive content has been delivered to live audiences of over 2,000 and his marketing campaigns have generated over $300 million for orthodontic practices all over the world.

Burleson Seminars coaching clients enjoy the benefit of the Burleson Files each month in territory-exclusive private consulting and proprietary marketing systems. Here you get a glimpse inside the world of Burleson Seminars and specifically what Dr. Burleson is reading to help him grow one of the largest orthodontic specialty practices in the United States and one of the fastest-growing orthodontic consulting firms on the planet—twice named to the Inc. 500 list of Fastest Growing Companies in North America.

Together with his notes and extensive practice experience managing large teams across multiple locations, Dr. Burleson combines practical theory with real-world advice for you and your orthodontic practice. The goal of these white papers and reports produced by Burleson Seminars is to help you grow your practice, change more lives, and advance the profession through supporting your community, employees, patients and vendors so that everyone around you thrives.
“Meetings suck” — we really only say that if we suck at running meetings.

**Cameron Herold** has been called the CEO Whisperer by the publisher of Forbes magazine and grew 1-800-GOT-JUNK as their Chief Operating Officer from $2 million in annual revenue to over $120 million in six years.

Throughout his career, Cameron kept hearing people say “meetings suck.” But he discovered that really—as he shows in his thoughtful assessment on the importance of meetings—we really only say that if we suck at running meetings.

If you’re in business, you cannot escape the fact that you need to meet regularly and communicate with your people, whether in person or on the phone. Cameron sees one of the best analogies of a well-run meeting in the American football huddle before every play. They literally get the whole team together, talk very briefly together and they hit the line and execute the plan. This kind of highly effective meeting has a purpose, rhythm, and outcome. Why can’t we bring this into the business world?

We can.

And in the following pages you’ll find the core concepts that will help boost the productivity of your meetings to a new level.
Most people try to avoid meetings by using written communication. But the problem is that written communication can easily be misinterpreted. That’s why we need to hold in-person meetings, so we can prevent—or at least quickly overcome—these types of miscommunications.

As an example, write down these words:

\[
\text{I didn’t say you were beautiful.}
\]

Now if you read those six words out loud and put the emphasis on a different word, what does it say? You can read a six-word sentence six entirely different ways.

The reason we have so many problems inside companies and so much miscommunication is because we don’t have face-to-face meetings enough, whether in person or on Skype or Facetime. But if you run meetings the right way, not only can your meetings be highly productive, but you can avoid all the miscommunication and misinterpretation written communication is prone to cause.

Every action we take follows the same basic steps, whether we are responding to a problem, developing a strategy, or brainstorming new growth opportunities: Plan > Brief > Execute > Debrief

This is also how the military undertakes every action. And you should do the same thing when you hold a meeting—no matter the size.

To run a meeting well, you need to begin by planning well; your meeting should have a regular rhythm and be held for a specific purpose. The 1+3 principle means that every meeting should have a specific, ONE-sentence purpose, and it should have no more than THREE desired outcomes. If you need to get more than three outcomes from a single meeting, you need to schedule another meeting.
Always start your meetings exactly on time and stop five minutes before the scheduled end time. Why stop five minutes early?

The reason most people show up late for meetings is because they are booked back to back. If you were an Olympic athlete showing up for your event, you wouldn’t show up just as the gun was going off. You would want to get there at least five minutes ahead of time to prepare.

That’s why you should end every meeting and phone call five minutes before the scheduled end time so that you can be at your next meeting on time and prepared. If you don’t show up five minutes before the start time, you’re late. Don’t over-schedule and don’t be selfish with your time by trying to squeeze one more thing in before your meeting.

Block your meetings for half the time you initially think you need. For example, if you think you need an hour meeting, force yourself to try it in 30 minutes. If you think you need an entire day, book a half-day. You can get things done in less time if you want to.

For each meeting, you need to decide who the most critical people are who need to be there.

Without an agenda, you can’t possibly know who should be at the meeting. Consequently, an effective meeting starts with the agenda. Before the meeting decide:

1. **What** you want to cover
2. **What order** you will present each agenda item
3. **How many minutes** you will spend on each one

Get good at letting people know they don’t always have to attend every meeting. You don’t need your lab technician to be there if you will be discussing the new printers and direct mail pieces with your treatment coordinators and marketing team. It’s OK if some people keep working on their projects and skip a meeting if they are not going to contribute to the outcome.

Every person who comes to the meeting should be participating in every agenda item. If not, they can leave during that agenda item.
SET THE STYLE

**With your agenda in hand**, consider each item and the team members who will be present, and then **set the proper communication style for each agenda item**. When everyone in the meeting knows what the communication style is for each agenda item, they will know whether their role is to contribute or just listen.

There are three communication styles:

1. **Consensus decisions**—There is discussion about the item, everyone offers ideas, and then a decision is made. Everyone agrees leaving the room that they’ve left the debate at the table.

2. **Creative discussion**—This is brainstorming and blue-sky discussions. Everyone’s ideas are thrown up on the wall and everyone gets heard, but no decision is made.

3. **Info-sharing**—You’re either telling me something or I’m telling you. Everyone’s job is to listen and maybe ask a clarifying question, but there is no discussion, no debate, and no decision is made.

If the meeting does involve decisions, finish off with a statement, “Who is doing what by when?” Then go around the table and everyone should state what they are doing and by when.

THE 7-MINUTE HUDDLE

**Here’s an example** of an effective 7-minute “to the point” stand-up meeting with a full team—very much like a football team huddle. This type of meeting provides a pulse for the organization.

1. Hold the quick meeting at 11 AM or 2 PM, which are at the two points of the day when energy is at its lowest.

2. Start by sharing good news.

3. Go through key metrics for the day. One area of the practice gives an update on their area one day and another the next day, etc., so that everyone is up-to-date each week on the entire business.

4. Go through any missing systems or frustrations.
The best meetings are being run by companies like General Electric and Starbucks. Cameron Herold always says his R&D stands for Rip-off and Duplicate, so he’s taken bits and pieces from other companies when he’s looking for shortcuts in business. Here are some of Cameron’s takeaways about meeting feedback order and process.

The role of every person attending the meeting—unless they are taking notes or are solely a timekeeper—is to participate equally with everyone else in the room. The CEO has no more power than any other attendee and any other attendee shouldn’t be speaking less than anyone else.

The entrepreneur, or most senior person in the room, always speaks last. If you’ve invited ten people to a meeting, you want to hear from all ten. As the leader, you don’t want to speak first and sway their opinions or ideas before you give them a chance to share.

With the Post-It® method, everyone gets a stack of Post-it® notes and they write down their ideas. Then the person presenting puts them on the wall and everyone in the meeting can only ask clarifying questions—they are not allowed to debate. Everyone’s ideas get heard. Everyone’s ideas get posted.

Usually by the time the entrepreneur or most-seenior person in the room gets to talk, everyone else’s ideas have already been posted.

Your role as the leader is to grow people so that their voices are heard and they can contribute their great ideas. It’s not to get your ideas heard. You give them the vision; let them figure out the “how.”
Of all the employees you have, how many of them have received at least a 30 minutes of training on meetings or have read at least one book on meetings. Cameron Herold asks, “Think about little league baseball for a moment. What parent would ever send their kid off to play little league baseball without at least showing them how to hold the bat, how to put a glove on and how to toss a ball at least a small distance away.”

But we all let our employees go to battle every day without ever giving them training on communication and running or attending productive meetings that get results.

At every meeting, a single person should be appointed as the moderator, and they will be tasked with three critical roles: moderator, timekeeper, and Parking Lot.

The Moderator Role
The moderator role means they will be controlling the idle chatter so everyone stays on the agenda. They’ll be keeping the group bobbing and weaving towards the agenda and staying on time, so they will have to be able to trust the pulse of the group and know the players a bit.

The Timekeeper Role
As timekeeper, when it’s time to go to the next item on the agenda, the moderator might say something like, “OK group, we have 10 minutes, so at 9 minutes I’m going to call you back in and get this agenda item finished.” This way if someone is droning on and on, the moderator can make it about the agenda and not about the person directly. After all, you want everyone to be heard, but you also have to stay on time.

The Parking Lot Role
The moderator also has the role of relegating some things to the Parking Lot. When someone brings up an idea that might have value, but it’s not on the agenda, the moderator can say, “That’s a great idea. Let’s put that in the Parking Lot.” That means the unrelated item will be added to the minutes as future business or placed on the agenda of a future meeting.

Additional Roles
To keep people engaged in the meeting, you (or the moderator) might call anyone out that you think is checking email or texting during the meeting, and they have to freeze and show their phone or email immediately. If you were right and they were not paying attention, they buy everyone lunch. But if you were wrong and they were actually working on their notes or working on the meeting outcomes, then you buy everyone at the meeting lunch.
TAKing IT To ThE NEXT LEVEL

HOST AN ANNUAL RETREAT

Consider hosting an annual retreat in September or October to plan your next calendar year. These annual planning meetings can help keep you on track to hit your three-year strategic vision. An annual retreat is a two-day, off-site meeting where you can rent out an old chalet or estate, cook meals together as a team, plan and work in the living room and dining rooms, and crank out some work. You’ll be planning your goals, revenue, profit, customer engagement, employee engagement, and strategic initiatives for the year.

After you’ve established your goals, then it’s a matter of coming up with your core ten projects that will make your goals happen and getting everyone on the leadership team on that same page.

The retreat can also be a little bit of skill development. Over the course of the two days, you can plan one or two sessions where you develop leadership skills, time management, problem solving, delegation, etc. in your leadership team.

Finally, the retreat can act as a team building exercise—but not like the hokey ropes course or break out rooms. You’ll be having fun, but it’s not meant to be leadership team building. The team building will be the result of being together as a team, cooking dinner, and having a glass of wine. It doesn’t have to be planned activities; just spending time together and breaking bread together can be enough.

A quarterly retreat would be the same format, but a half-day or a full day instead of two. It should still be out of the office and cell phones should be turned into a basket and turned off from 8 AM to 5 PM during the retreat.
Consider creating a board of advisors for your company. A board of advisors, however, is quite different than a board of directors, which really only exists for compliance and accountability concerns.

The board of advisors is totally different. This group would usually have five members and would meet four to five times per year. It would consist of people the company founder or CEO really trust and admire, people who would be able to provide quality feedback and insight.

A board of advisors should not include a CPA or an attorney because that type of talent can be hired—and those people typically have a tendency to say “no” more than “yes” anyway. Instead, a good board of advisors should be comprised of marketing, operational, systems, and management talent who are well-rounded and can consider the entire business as a whole.

Most advisors will serve on your board without pay simply because they like you and admire what you’re doing with your company; they want to help you succeed. They are likely already making more than you could pay them to be on your board anyway.

How a Board of Advisors Operates

A few weeks before your board of advisors meeting, you would send the board a company packet that includes the current financials (Profit and Loss, Balance Sheet, and Cash flow statements) and updates on the company—what’s going well, what’s not going well, what you are working on for the next quarter, and where you are stuck.

Then you would let them know about the two core areas you want to talk about at the board meeting so that when they show up, they will have had time to prepare their questions. When the board meets, the total meeting time should be three to four hours.
Cameron thinks performance reviews are crap, if for no other reason than the fact that the federal government uses them. But all kidding aside, if you have children, you don’t give your kids an annual performance review. If they do something that requires attention or correction, you do something about it now. Similarly, if they do something amazing that requires praise and congratulations, you do it immediately.

So instead of performance reviews, Cameron uses what he calls “Race to the Conflict,” which is based on research from Ken Blanchard and Dr. Paul Hersey. (Ken Blanchard is author of The One Minute Manager and Dr. Hersey is the creator of the Situational Leadership Model which he developed over 50 years ago and which is still the number one system on leading people today.)

“Race to the Conflict” means that if somebody does something wrong, Cameron uses the “You did—I feel—I need” formula. He’ll pull them aside and say, “Hey, when you did this, this is how it made me feel. What I need from you in the future is…” Then he will ask them how they feel about it. With this process, he’s giving them very focused feedback about a specific incident, and then he’s asking them if they need help going forward or if they are good.

He recommends doing the same thing with praise—grab them right away and give them praise immediately in concrete terms.
Dustin Burleson Seminars consults with and coaches more than 2,000 orthodontists in 24 countries, helping orthodontic practice owners build a bigger vision for their practices by changing more lives, advancing the profession, and supporting their communities. For more details or to read about case studies from actual clients and the results they have achieved with Burleson Seminars, please visit DustinLovesResults.com. Or for free monthly resources your team can read and implement to help grow your practice, visit Dustin’s popular reading list at TheBurlesonFiles.com.