

AVOIDING MEETING MELTDOWN



Opticon @ Vision Expo East 2023

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PRODUCTIVITY CONCERNS

- Managing Meeting Schedules
 - Too Many
 - Not Convenient
 - Not Relevant
- Managing Inboxes
 - Hard Copies
 - Virtual Documents
 - Emails
 - Reminders



WHY NOT TO MEET?

- Does It Add Value?
- Why Not To Meet
 - Does Not Create Value
 - Frees Up Valuable Time
 - No Meeting ROI



WHY MEET?

- Scheduled Meeting
 - What Is The Frequency?
- Reason Specific
 - Up-To-The-Minute Info
 - Educational Opportunities
 - On-Boarding
 - Renewed Motivation
 - Social Gathering
 - Unexpected Event/Situation



REASON SPECIFIC

- Up-To-The-Minute Info
 - New Products & Services
 - Availability, Purchasing Pricing, Training
 - Sales Techniques
 - Share Creativity
 - Roll Play
 - Find Strengths
 - Brainstorm
 - Maximize at 8



REASON SPECIFIC

- Up-To-The-Minute Info cont.
 - Insurance Updates
 - Medical & Spectacle
 - All On The Same Page
 - Patient Interaction
 - Practice Policies
 - Policy Changes/Updates
 - Policy Manual



REASON SPECIFIC

- Educational Opportunities
 - In-house
 - Breakfast Breakout
 - Lunch & Learn
 - Super Supper
 - Off Site
 - Lab Partners
 - Local Vendors



REASON SPECIFIC

- On-Boarding
 - Meet & Greet
 - New Team Member
 - New Management/Owner
 - Encourages Camaraderie
 - Outlines Job Descriptions
 - Address Questions
 - Reduces Future Conflict



REASON SPECIFIC

- Social Gathering
 - Encourages Camaraderie
- Off Site
 - Evening Dinner
 - Summer Picnic
 - Holiday Party
 - Annual Gala



REASON SPECIFIC

- Renewed Motivation
 - Wakes Up a Comatose Environment
 - Encourages Camaraderie
 - Pleases Leadership
 - Promotes Team Work
 - Decreases Conflict
 - Increases Productivity
 - Increases Patients' Trust
 - Increases Revenue.



REASON SPECIFIC

- Unexpected Event/Situation
- In-Office Crisis
- Death
- Leadership Role
 - Coping Skills



SCHEDULED MEETING cont.

- How Often?
 - Quarterly Conferences
 - >1 Hour
 - Along With Future Monthly, Weekly, Daily Mtgs.
 - Set Goals & Incentives
 - Brainstorm
 - Role Play
 - Educational Opportunities
 - Engage The Team!

Q1	Q2
Q3	Q4

SCHEDULED MEETING cont.

- How Often?
 - Monthly Meet
 - < 60 Minutes
 - Participation
 - Recap Previous Goals
 - New Topics
 - Assign Taskers
 - Encourage and Answer Questions
 - Interactive Informative
 - Stay on Point

January	February	March
S M T W T F S	S M T W T F S	S M T W T F S
1 2 3 4 5 6 7	1 2 3 4	1 2 3 4
8 9 10 11 12 13 14	5 6 7 8 9 10 11	5 6 7 8 9 10 11
15 16 17 18 19 20 21	12 13 14 15 16 17 18	12 13 14 15 16 17 18
22 23 24 25 26 27 28	19 20 21 22 23 24 25	19 20 21 22 23 24 25
29 30 31	26 27 28	26 27 28 29 30 31
April	May	June
S M T W T F S	S M T W T F S	S M T W T F S
1	1 2 3 4 5 6	1 2 3
2 3 4 5 6 7 8	7 8 9 10 11 12 13	4 5 6 7 8 9 10
9 10 11 12 13 14 15	14 15 16 17 18 19 20	11 12 13 14 15 16 17
16 17 18 19 20 21 22	21 22 23 24 25 26 27	18 19 20 21 22 23 24
23 24 25 26 27 28 29	28 29 30 31	25 26 27 28 29 30
30		
July	August	September
S M T W T F S	S M T W T F S	S M T W T F S
1	1 2 3 4 5	1 2
2 3 4 5 6 7 8	6 7 8 9 10 11 12	3 4 5 6 7 8 9
9 10 11 12 13 14 15	13 14 15 16 17 18 19	10 11 12 13 14 15 16
16 17 18 19 20 21 22	20 21 22 23 24 25 26	17 18 19 20 21 22 23
23 24 25 26 27 28 29	27 28 29 30 31	24 25 26 27 28 29 30
30 31		
October	November	December
S M T W T F S	S M T W T F S	S M T W T F S
1 2 3 4 5 6 7	1 2 3 4	1 2
8 9 10 11 12 13 14	5 6 7 8 9 10 11	3 4 5 6 7 8 9
15 16 17 18 19 20 21	12 13 14 15 16 17 18	10 11 12 13 14 15 16
22 23 24 25 26 27 28	19 20 21 22 23 24 25	17 18 19 20 21 22 23
29 30 31	26 27 28 29 30	24 25 26 27 28 29 30
		31

SCHEDULED MEETING

- How Often?
 - Weekly Pow-wow
 - < 20 minutes
 - Interactive & On Point
 - Daily Briefing
 - < 10 Minutes
 - Peppy & Quick
 - Stand Up



VIRTUAL MEETINGS

- Audio Calls
- Video Meetings
- Audio/Video Meetings
- Computer, Tablet, Smart Phone
- So Many Choices



VIRTUAL MEETINGS

- Free Conference Call
 - freeconferencecall.com
- Skype
 - skype.com
- Slack
 - slack.com
- Flock
 - flock.com
- Google Hangouts
 - hangouts.google.com



VIRTUAL MEETINGS

- GoToMeeting
 - gotomeeting.com
- Webex
 - webex.com
- ZOOM
 - zoom.us
- Uber Conference
 - uberconference.com
- Office Vibe
 - officevibe.com



VIRTUAL MEETINGS

- Strategies for Engagement
- Explain Platform Functions
 - Mute, Chat, Question, Background
- Video Cam on Please
 - Initiating?
- Use Tech Functions
 - Share Screen, Draw, Videos
 - Polls, White Boards



VIRTUAL MEETINGS

- Engage 1st 5 Minutes
 - Make Note Of Everyone
- Engage Every 15 Minutes
 - Show Me _____
 - Penny, Right Shoe, Pet
 - Sunglasses,
- Goal = Interaction



THE INVITATION LIST

- All Relevant Parties
 - Why Should I Be There?
- Larger Practices
 - Consider Concurrent Meetings

NAME	SIGNATURE
Dr. Pierce	
Caitlin G	
Kamisha B	
Maria R	
Thomas B	
Yuko M	

THE MEETING ORGANIZER

- What Type Of Meeting?
- Who Will Organize?
- What Has To Be Done?



LEADERSHIP PREPARATION

- Set The Dates
 - Be Fair
 - Be Flexible
- Choose The Place
 - On-site Room
 - Off site Room



LEADERSHIP PREPARATION

- Leadership Briefing
 - Important input
 - Be Informed
- Prepare The Agenda
 - Guide To Follow Along
 - Invite Input
 - Gather Materials



THE AGENDA

Optical Meeting February 10, 2023 Lidia's

- Welcome
- Introduce & Recognize
- Previous Discussions
- New Discussions
- Department Reports
- From The Floor/Parking Lot
- Program (if applicable)
- Next Meeting Date/Location
- Thank You Attendees, Owner

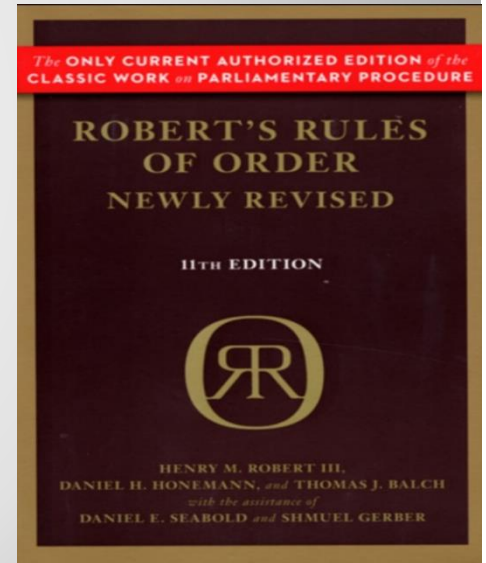
LEADERSHIP PREPARATION

- Distribute The Agenda
- Reconfirm
 - In-House Memo
 - Phone
 - Email
 - Text
 - Skype/Slack/Flock
 - Social Media



FACILITATOR ROLE

- Know When To Begin
- Start On Time
- Follow The Agenda
- Know When To Adjourn



FACILITATOR ROLE

- Assign a Note Taker
- Future Meeting Minutes
- Invaluable
- Recorded History



FACILITATOR ROLE

- Stimulate Communication
 - Set Rules of Engagement
 - Guide & Set Time Limits
 - Clarify Communication
 - Address Questions
 - Address Concerns
 - Maintain Order



FACILITATOR ROLE

- Assign Taskers
- Go Getters, Getters, Forgetters
- Be Specific & Clear
- Set Reasonable Deadlines
- Touch Base Soon
- Say "Thank You"
- Share With The Team
- Lead By Example



POST MEETING

- Leadership Debriefing
 - Immediately Following
- Analyze The Meeting
 - Gather Feedback
 - Fine-Tune For The Next
- Follow Up
 - Action Items
- Gather/Distribute Minutes
 - Written Summary
 - Corporate Records



WRITTEN SUMMARY

- Note Taker
 - The Assigned One
- Distribute
 - Hard Copy
 - Email
 - Virtual Bulletin Board
 - Web Storage

Optical Meeting
Friday February 10, 2023
Lydia's

- Present/Absent Attendees
- Meeting Summary
- Attachments/Enclosures
- Thank Yous
- Submitted By _____
- Date _____

KEEP IT POSITIVE PLEASE

a. That won't work.

b. Let's consider it.

a. It's good, but here is my idea.

b. It's good, let's build on it.

a. It didn't work before.

b. Let's explore today's options.

a. You're kidding, right?

b. I like your creativity.

a. Negative Begets Negative

b. Positive Begets Positive

ATTENDANCE TIPS

- Feed The Team
 - Bring to the Table
- Pay The Team
 - Federal - Fair Labor Standards Act
 - FLSA
- Include The Team
 - Why Bother?
 - Why Am I Here?



ATTENDANCE TIPS

- Engage Them!
 - Share Weekly Successes
 - Share Personal & Professional
 - Share Expertise & Learn

ATTENDANCE TIPS

- Make It Fun!
 - Give-a-ways
 - Contests
 - Themes

