



HOW TO MASTER
THE MORNING
MEETING:
A TEMPLATE

|
Free Guide

THE WYRICK OUTLOOK, INC



HOW TO MASTER THE MORNING MEETING: A TEMPLATE

|

Free Guide

THE WYRICK OUTLOOK, INC

HOW TO MASTER THE MORNING MEETING

This template encourages every team member to come prepared with topics to contribute.

Why? Because when everyone's engaged, your morning meetings become powerful, productive, and set the tone for a high-performing day.

Morning Meeting Date: _____

Yesterday's Schedule / Follow - ups: _____

TREATMENT COORDINATOR

Yesterday's exams:	Patient Name:	Status	Why?
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

Goal for Month: _____ Have Started? _____ Scheduled? _____ Need? _____

	Patient Name:	Family?	Unique/Needs?	Grading?
Today's Exams:	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

FINANCIAL COORDINATOR

Delinquent Patients: _____ Hold or Advance Tx: _____

Final Adjustment Patients: _____ Balance OK? _____

CLINICAL STAFF

Last Retention Visit Patients: _____

Overtime Cases: _____ Why: _____

Delivery Appts: _____ Lab OK? _____

EMG PTs / Why: _____ Chronic? _____

Start Appointments: _____

SCHEDULING COORDINATOR

Appointment Availability: _____

Upcoming in Schedule: _____

MARKETING COORDINATOR

Current Promotion: _____ Upcoming: _____

Marketing Idea TO DO _____

Contest Winners: _____ Review: _____

Dr. Add Ins _____

Question of Day, Before/After Case, Joke, Quote, Goofy Morning Photo, Etc.