Practice Management Meeting Agenda Template

A structured meeting tool for healthcare practice leadership, accountability, performance review, and follow-through

Purpose

Use this agenda to run consistent weekly or monthly practice management meetings. The template helps leadership teams review operational performance, staffing, scheduling, collections, patient flow, compliance tasks, open projects, vendor concerns, and action items in a disciplined format.

How to Use This Resource

Use the agenda at a consistent cadence, ideally weekly for operational teams and monthly for leadership review.
Bring current KPI reports, aging reports, schedule data, staffing updates, compliance logs, and open-project trackers.
Assign one owner and one deadline for every action item.
Start each meeting by reviewing prior commitments before opening new issues.

1. Meeting Setup and Attendance

☐	Checklist item	Notes / owner
☐	Confirm meeting date, time, location or virtual link, facilitator, note-taker, and required attendees.	
☐	Identify absent leaders and determine whether decisions can proceed without them.	
☐	Review meeting purpose: operational control, performance visibility, accountability, and follow-through.	
☐	Confirm the prior meeting notes, open action items, and unresolved decisions are available.	

2. Prior Action Item Review

☐	Checklist item	Notes / owner
☐	Review each open action item from the prior meeting.	
☐	Confirm whether each item was completed, delayed, reassigned, or escalated.	
☐	Document barriers that prevented completion and decide whether additional resources are needed.	
☐	Close completed items only when evidence or confirmation has been documented.	

3. KPI and Financial Performance Review

☐	Checklist item	Notes / owner
☐	Review production, collections, adjustments, accounts receivable, denial trends, and cash flow indicators.	
☐	Review provider productivity, hygiene productivity, case acceptance, cancellation rate, no-show rate, and new patient flow.	
☐	Identify metric variances that require investigation or corrective action.	
☐	Assign ownership for data cleanup, reporting gaps, and performance improvement items.	

4. Scheduling, Patient Flow, and Capacity

☐	Checklist item	Notes / owner
☐	Review schedule utilization, provider availability, room capacity, block scheduling, wait times, and bottlenecks.	
☐	Identify gaps from cancellations, unfilled chair or room time, late starts, overtime, or poor handoffs.	
☐	Review patient communication issues affecting attendance, treatment acceptance, or follow-up.	
☐	Assign workflow corrections for scheduling, confirmations, recalls, referrals, or surgical case coordination.	

5. Staffing, Training, and Accountability

☐	Checklist item	Notes / owner
☐	Review staffing levels, overtime, absences, turnover, role clarity, and performance concerns.	
☐	Confirm training needs, competency gaps, cross-training priorities, and onboarding issues.	
☐	Review whether assigned tasks are being completed consistently and documented appropriately.	
☐	Assign follow-up conversations, coaching, written protocols, or escalation steps as needed.	

6. Compliance, Risk, and Documentation

☐	Checklist item	Notes / owner
☐	Review outstanding compliance tasks, training records, inspection readiness, incident reports, and corrective actions.	
☐	Review HIPAA, OSHA, infection control, credentialing, privacy, security, and documentation concerns relevant to the practice.	
☐	Confirm whether policies, logs, licenses, certifications, or vendor documents require updates.	
☐	Assign responsible parties for compliance gaps, documentation deficiencies, and follow-up evidence.	

7. Projects, Vendors, and Strategic Priorities

☐	Checklist item	Notes / owner
☐	Review current projects, deadlines, budget impact, vendor issues, and implementation barriers.	
☐	Confirm whether vendor deliverables, contracts, renewals, invoices, and service concerns require action.	
☐	Review progress toward quarterly goals and strategic priorities.	
☐	Identify decisions requiring owner, physician, board, or executive approval.	

8. Final Decisions and Action Plan

Use this section to capture final commitments before the meeting ends.

Priority	Decision / action item	Owner / due date
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Resource Page Intro Copy

Download this meeting agenda template to create a consistent leadership cadence for reviewing practice performance, staffing, scheduling, compliance tasks, open projects, and accountability items.

Website CTA Copy

Need help building a management rhythm that actually improves execution? Solstice Group can help design practical meeting structures, KPI review systems, and accountability workflows for your practice.

Disclaimer

This resource is provided for general business and compliance education only. It is not legal, medical, accounting, tax, financial, regulatory, or clinical advice. Organizations should consult qualified legal, compliance, privacy, financial, and professional advisors regarding their specific obligations and risk profile.