The ALIGN Method™

BY KYLE SUMMERFORD

(4-6 Minutes)

Most morning huddles either don't happen, run too long or turn into a vague recap that doesn't change how the team performs. The truth is, a great huddle doesn't need to be complicated — it just needs structure.

The ALIGN Method is a simple, repeatable framework designed specifically for dental practices. It keeps your huddle focused, fast and actionable. Each letter represents a step, and each step has a clear purpose. Here's how to put it to work in your practice.

For the full ALIGN training guide, grading rubric and scoring tools, visit www.Traynar.ai.

A - Arrive & Agenda

START ON TIME. STATE THE PLAN.

This sounds basic, but it's where most huddles already fall apart. If the meeting starts late, has no agenda or opens with "what's up today?" — you've already lost the room. The first 30 seconds set the tone for the entire day.

HOW TO DO IT: Designate a huddle leader (this can rotate). That person opens with a brief agenda and a timebox. It doesn't need to be formal — it just needs to be intentional.

EXAMPLE: "We're starting on time. We'll review today's goals, patients on the schedule, flag any risks, assign ownership, go over our fill strategy and wrap up in 12 minutes."

L - Layout the Day

CLARIFY GOALS AND SCHEDULE HIGHLIGHTS.

Your team can't hit a target they can't see. This step is about giving everyone a shared picture of the day — not just what's on the schedule, but where the pressure points and priorities are.

HOW TO DO IT: Share the production or visit goal for the day. Call out peak hours, large cases, lab-dependent procedures and any staffing considerations. Use the CareCredit integration in your software to identify the patients who have the CareCredit credit card or have already been approved to have more informed cost conversations. The goal is to move from "let's try to be productive" to "here's exactly what we're working toward."

EXAMPLE: "Today's goal is $15,200 across 62 visits. We're busiest from 9–11 and 2–4. There's a crown delivery at 1:30 that's lab-dependent, and we're short one assistant after 2pm."

I - Identify Risks

ANTICIPATE DISRUPTIONS BEFORE THEY HAPPEN.

Every day has risks. The question is whether your team sees them coming or gets caught off guard. This step is a quick "premortem" — a proactive look at what could go wrong so you can plan around it instead of reacting to it.

HOW TO DO IT: Identify two or more specific risks. These might include unconfirmed appointments, complex procedures, tight lab turnaround, staffing gaps or patients with a history of cancellations.

EXAMPLE: "We have two unconfirmed new patients this morning, tight lab timing on the 1:30 crown and limited coverage after 2pm."

G - Get Owners

ASSIGN ONE OWNER PER TASK WITH A CLEAR TIMEFRAME.

This is where most huddles lose their power. The team discusses what needs to happen, but nobody is specifically responsible. "Someone should handle confirmations" is not a plan. One owner, one task, one deadline — that's what drives execution.

HOW TO DO IT: For every priority identified in the huddle, assign a single person and give them a timeframe. Keep it simple and direct.

EXAMPLE:
"**Janel:** confirmations done by 9:30. **Luis:** 10 reactivation calls by 11:00. **Bea:** room flow support from 2–4."

N - Next Steps & Close on Time

A HUDDLE THAT RUNS 20 MINUTES AND ENDS WITHOUT A RECAP IS JUST A MEETING THAT STOLE CLINICAL TIME.

The final step is about closing with clarity: recap who owns what, confirm the same-day fill strategy and get the team moving — aligned and confident.

HOW TO DO IT: Quickly summarize responsibilities. Confirm the plan for filling any same-day openings (yesterday's cancellations, waitlist, reactivation). End on time.

EXAMPLE: "Fill plan: call yesterday's cancels plus the waitlist — goal is three same-day fills. Recap: **Janel** by 9:30, **Luis** by 11, **Bea** 2–4. Done in 10 minutes. Let's have a great day."

Financial Readiness & Patient Conversations

One of the most overlooked parts of the morning huddle is financial preparation. When the team knows where patients stand financially before they walk through the door, conversations become more confident, supportive and effective — and patients are more likely to move forward with care.

AS PART OF YOUR SCHEDULE REVIEW, TAKE A MOMENT TO IDENTIFY:

- **Patients who already have approved financing or an available credit limit that could support same-day treatment**
- **New patients who are likely to need treatment and may benefit from a financial conversation early**
- **Patients in between visits — such as post-ops or phased treatment — who may be ready to continue care**
- **Patients currently on a pay-by-visit or staged treatment plan with services scheduled for today**

When financial readiness is part of the huddle — not an afterthought — the team can approach these conversations with empathy and preparation instead of scrambling at the chair. That's better for the patient and better for the practice.

Take Your Huddles Further

The ALIGN Method includes a full training guide and grading rubric that helps practices score their huddles on a 0–15 scale, identify coaching opportunities and build consistency over time. Whether you're leading huddles yourself or training your team to run them, the complete framework is available at www.Traynar.ai.

ABOUT KYLE SUMMERFORD

Kyle Summerford is a dental practice leader, speaker and Founder of DOMA — The Dental Office Managers Alliance, an organization advancing leadership, operations and growth for dental office managers and teams. With over two decades of experience in dental practice management, Kyle works with practices across the country on operational alignment, case acceptance, team leadership and workflow performance.

www.KyleSummerford.com | www.DentalOfficeManagers.com | www.Traynar.ai