A FREE GUIDE BY LAURA NELSON · BRUSH UP ON AI

Turn your CE notes into a

Monday plan

so that notebook doesn't end up on a shelf

Take the full notebook you brought home from CE and turn it into three things your team actually starts this week, with a five-minute huddle plan that says who owns what.

10 minutes a day | Works in ChatGPT or Claude | No patient info, ever

Two days out of the office. You and your team come back excited, motivated, ready to make changes. A full notebook of CE.

And then Monday happens. The phones ring, the schedule fills, and that notebook goes on a shelf.

We've all done this. This guide fixes the part in between: getting from "great notes" to "here's what we're doing this week," in about 15 minutes. Four steps, each with a prompt you can copy into ChatGPT or Claude. The free versions work fine.

Quick AI reminder: no patient info goes in. Ever. If a patient came up in your notes, leave that page out or cross it out before you take the photo. Your notes on systems, scripts, scheduling and team stuff are what you want here. Want to practice first? Try these prompts on your supply order or your end-of-day report.

1 Get your notes into AI

Notes in a notebook don’t get used. Notes AI can read can be sorted, shortened and turned into a plan in a minute. You don’t have to rewrite anything. Messy is fine. Snap a photo of each page, type in the highlights, or record yourself on the drive home and paste in the transcript. Then send this.

SORT YOUR NOTES

These are my notes from a dental CE course on [COURSE TOPIC]. I work as [your role] at a dental office. Read through everything and give me a short list of the main ideas, in plain words, one line each. Skip anything that only applies to a specialty we don't do: [what your office does NOT do].

WHAT GOOD LOOKS LIKE

A clean list of 8 to 15 ideas you recognize from the course. If it missed something you loved, just tell it: "You left out the part about [IDEA]. Add it."

2 Pick three things for this week

This is where most of us get stuck. Fifteen good ideas feels like a lot, so nothing gets started. Three is doable. Small and started beats big and someday.

PICK THREE

From that list, pick the three ideas my team could start THIS WEEK without buying anything new or changing our software. We're a team of [NUMBER] people: [roles, like 2 front desk, 3 hygienists, 2 assistants, 1 office manager]. For each one, tell me in one sentence why it's a good place to start.

WHAT GOOD LOOKS LIKE

Three ideas that feel small enough to actually try by Friday. If one feels too big, say "Swap number 2 for something smaller."

3 Turn it into a Monday huddle plan

A plan nobody owns is just a nice idea. The huddle is where it becomes real: the team hears what you learned, what you're trying, and who's on it.

BUILD THE HUDDLE PLAN

Turn those three ideas into a 5-minute morning huddle plan I can read to my team on Monday. Use three short parts:
1. What we learned (2 or 3 sentences, plain words)
2. What we're going to try this week (the three things)
3. Who's responsible for each one: [TEAM MEMBER ROLE], [TEAM MEMBER ROLE], [TEAM MEMBER ROLE]
Keep it friendly and short enough to read out loud in under 5 minutes.

WHAT GOOD LOOKS LIKE

Something you could read out loud as is, with every item matched to one person. If it sounds stiff, tell it "Make this sound like a coworker talking, not a memo."

4 Check back on Friday

A quick check-in is what keeps it from sliding back onto the shelf. It also tells you what to keep and what to drop.

FRIDAY WRAP-UP

Here's how our three CE ideas went this week: [what happened with each one]. Write me a short Friday huddle wrap-up: what worked, what we'll keep doing, and one thing to adjust next week. Keep it under 150 words.

WHAT GOOD LOOKS LIKE

A short wrap-up you can read Friday, and a clear "keep doing this" for at least one idea.

Your 5-day plan

Monday. Read your huddle plan out loud at the morning huddle. 5 minutes.

Tuesday. Each owner takes the first small step on their item. One quick check-in: "How's it going?"

Wednesday. Pick the one that's working best and give it a little more attention.

Thursday. Ask AI to turn the best one into a one-line reminder for the front desk or the break room.

Friday. Run the step 4 prompt and read the wrap-up at huddle.

Don't just take notes. Actually start to use your notes.

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