

2027 ANNUAL PLANNING SESSION

Annual Production Forecast, Growth Plan
& Goal-Setting Workshop for 2027



FRIDAY NOV 06, 2026

6
CEs

9:00AM - 4:00PM

Inspired by the leadership principles from Trust & Inspire, this workshop is designed to help practice owners build high-trust cultures that unlock team performance and sustainable growth. Through Fortune's proven annual planning process, you will develop a clear production forecast, strategic growth plan, and meaningful goal while learning how trust-driven leadership creates stronger engagement, accountability, and results for the year ahead.

THIS WORKSHOP WILL ALSO COVER:

- Annual Production Forecast & Growth Plan
- Goal Setting Workshop for 2027
- Outcomes and goals for all five Business Engines
- Creating a strong marketing plan to meet New Patient goals



SPEAKER

LEN TISO

EXECUTIVE COACH, FORTUNE

Len Tiso is an experienced executive coach, trainer, and consultant who is passionate about helping people and organizations to flourish. He enjoys helping clients to identify and develop their inherent skills and talents, set goals in alignment with business and leadership objectives, overcome obstacles, and maximize their productivity, performance, and engagement. Len is appreciative of the uniqueness of each client and is committed to empowering each client to discover, invest in, and leverage their own unique edge so that they may maximize their impact with their own clients and teams. His coaching specialties include leadership development, strategic planning, goal setting, productivity enhancement, team dynamics, and emotional intelligence.

**THEME BASED ON THE
BEST-SELLING BOOK BY
STEPHEN M. R. COVEY**



\$99 PER PERSON

LUNCH, SNACKS &
WORKBOOK INCLUDED

RSVP BY FRIDAY OCT 30

FOR MORE INFO: Andi Moore

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SCAN OR VISIT
bit.ly/4xsbOP7



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OCTOBER 31, 2023 Provider ID# 304402