

Visioneering

Visioneering = Inspiration + Conviction + Action + Determination + Completion

Begin with End in Mind

Creates foundation to YOU and your Team

One ticket - will it have mattered?

Build

Team building / Culture
Startup (De Novo) vs Acquisitions?
Facility & Equipment (cost engineering)
SOP's (Standard Operating Procedures)
Sustainability in Dentistry

Marketing

[OMNI CHANNEL]

Content Creation - 3 buckets > Stories, Educational, Branding
Storytelling Marketing
Paid Ad Management - YT / FB / IG / Google / Yelp
Remarketing
Video Marketing
Keyword research
Social Media (paid / organic)
Website & SEO
Local SEO
Chatbot / Texting services

Enroll

Easy button - Reduce fear - starts online
Phone Call Verbiage - friendly & efficient
The 1st visit & Check-in process
Coordinated Hand-offs (patient comfort)
Non Dental Verbiage (communication)
NLP / Non-verbal Communication

Clinical

The ACTUAL DENTISTRY

Comprehensive Diagnosis
Tx Presentation / Financial Presentation
Optimized Patient comfort
Same Day Dentistry opportunities?

Retain

The Experience
Follow-ups & Post-op calls
Customer Service
Tech Enabled access
Next Recall / Recare before leaving

Recapture

System when people go "inactive"
System of follow-ups (email, text, call)
Consider "Thank you Economy"

Referral

Asking for Reviews
Friends/Family that we can schedule?
Gifting
(law of reciprocity)

Measure

Pearson's Law
Bulletproof KPI's
Actions from KPI's (don't just measure)
Rewards / Bonus systems / Team Comp

Fulfillment

You - The Human - Are you Fulfilled & Happy?
Your Purpose defined?
Living Authentically.

Wealth Section:

Partnerships

Trial Partners / Associates
Contracts / Partnership agreement
Buy-Sell Insurance
Divide & Conquer
Banking vs Owner Financing Buy-in

DSO

Self DSO (Internal Management Agreement)
What is the MOST attractive to a DSO buyer
Aligning with a DSO (time, growth, etc)

Real Estate

Buy vs Rent (Adv / Disadv to both)
Cost Segration
Passive vs Active Ownership
Demographic Study

Multiple Locations

When is RIGHT time?
Flagship vs Multiple Mess
Acquisition vs Start-up
Data Driven Decisions - DentaGraphics

Financial Planning

Retiring at _____
Can you retire?

**Choose which you'd like to pursue*

The Bullet Proof Pathway