

# 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 shedule?  
Gifting  
(law of reciprocation)

## 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 Fullfilled & 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**