



DAY 1

THE PRACTICE THAT MOVES AS ONE

From Success to Alignment — The Realization That Changes Everything

On Day 1, we begin with a realization that is both simple and profound.

Most practices do not struggle because they lack ambition.
They struggle because their success has been built on effort — not alignment.

For many of us, that effort has worked. It has created growth, reputation, and opportunity. But over time, something begins to feel heavier. Execution becomes inconsistent. Progress slows. And despite working harder, the results no longer scale in the same way.

This is the moment we confront a deeper truth:
The ceiling we are experiencing is not external.
It is the limit of a leadership system that still depends on one person.

Day 1 allows us to see our practice differently.
Not as a group of individuals performing well...
But as a system that must be intentionally designed to move forward — together.

And more importantly, it allows us to see ourselves differently.

Because the way our practice performs will always reflect how we think, how we lead, and how well we are aligned with each other.

Identity — Where Alignment Begins

From that moment, everything moves into identity.

Not just who we are in our roles...
But who we are as individuals — across every dimension of our lives.

We explore identity as something that is not situational, but consistent:

- ▶ Personal
- ▶ Professional
- ▶ Private

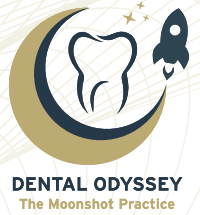
Because whether we are in the practice, at home, or in our community — we are the same person.

And from that identity, everything else is shaped:
Identity → Values → Behaviors → Systems

This is not simply a framework for building a better practice.
It is a framework for building a more intentional life.



THE LEADERSHIP THREAD



As we begin to understand this, we see how:

- ▶ Our values shape our decisions
- ▶ Our behaviors shape our outcomes
- ▶ Our systems shape our consistency

And how the same principles that elevate the practice...
Elevate the individual as well

***This is where growth becomes personal —
not just professional.***

The Leadership System That Brings It Together

Once identity is clear, the conversation shifts to leadership.

And here, we make a critical shift together.

Leadership is no longer concentrated in one person.

It is built as a system.

Each role in the practice carries ownership — not just responsibility, but leadership.

We begin to see how:

- ▶ The Practice Success Director creates alignment, cadence, and consistent daily value
- ▶ The Clinician builds trust, delivers excellence, and strengthens referral relationships
- ▶ The Treatment Consultant creates clarity so patients can move forward with confidence
- ▶ The Strategic Growth Partner builds both the breadth and depth of the referral network

Different roles.

Different responsibilities.

But one system.

And when that system is aligned, something powerful happens:

Execution no longer feels forced.

It becomes natural, consistent, and predictable.

The practice stops being carried by one person...

And begins to move as one.

And within that system, each of us experiences something different:

- ▶ Clarity in our role
- ▶ Confidence in our decisions
- ▶ Consistency in our performance

Because we are no longer operating alone.

We are aligned.



From Incremental Growth to Moonshot Ambition

Once alignment is established, a new level of thinking becomes available to us.

We begin to move beyond incremental growth — and start to explore what becomes possible when everything is aligned.

The question shifts from: *“How do we improve what we're doing today?”*

To: *“What are we truly capable of becoming — together?”*

This is where moonshot ambition begins.

Not as a concept, but as a shift in how we think and operate.

Because when identity is clear, roles are aligned, and systems are in place:

- ▶ Our actions become focused
- ▶ Our progress becomes measurable
- ▶ Our growth becomes repeatable

What once felt like a stretch begins to feel achievable.

And over time... inevitable.

This is supported by a rhythm:

- ▶ Daily focus
- ▶ Quarterly progress
- ▶ Annual transformation

And then the cycle repeats — at a higher level.

***Not just for the practice...
But for each of us individually***

What Day 1 Creates

By the end of Day 1, something shifts across the entire room.

We no longer see the practice as a collection of roles.
We see it as a system.

We no longer see leadership as a title.
We see it as something we each carry.

And we no longer see growth as effort alone.
We see it as the result of alignment.

But something even deeper begins to take shape.

We begin to understand what it means to become a tribe.

A group of people aligned not just by roles...
But by identity, standards, and shared responsibility.



A tribe that:

- ▶ Protects what matters
- ▶ Supports each other
- ▶ And moves together toward something greater than any individual

Because exponential growth is never created alone.

***It is created by a tribe that is aligned,
committed, and moving as one.***

What We Will Gain on Day 1

- ▶ A clear understanding of why practices plateau — and how alignment breaks the leadership ceiling
- ▶ The ability to define identity across personal, professional, and private life
- ▶ A practical framework to connect identity → values → behaviors → systems
- ▶ Clarity on how identity translates into systems that drive consistent performance
- ▶ A shared understanding of leadership as a system — not a position
- ▶ Insight into how each role contributes to alignment, execution, and growth
- ▶ The ability to create consistent daily value through cadence and structure
- ▶ A new way to remove friction from execution and build system-driven performance
- ▶ Understanding how aligned identity and systems create the foundation of a true tribe
- ▶ A foundation for building a culture of continuous growth and evolution
- ▶ Tools and frameworks to reinforce new ways of thinking and acting
- ▶ A shift from incremental thinking to moonshot ambition
- ▶ A clear path to translate vision into daily action and long-term results
- ▶ The beginning of building a tribe that supports, protects, and sustains exponential growth



DAY 2

THE LEADER AND THE LIFE YOU ARE BUILDING

AUDIENCE: CLINICIANS

From Clarity to Responsibility

On Day 1, you gained clarity with your team. You began to understand identity, alignment, and how your practice can be structured to perform at a high level. But clarity alone does not create growth. There comes a point in every successful practice where understanding is no longer enough, and the question shifts from “What do I know?” to “What am I willing to take responsibility for?”

Day 2 is where that shift happens. You begin to see that the ceiling you are experiencing is not the market, not the opportunity, and not even your clinical ability — it is the current leadership system of your practice. And if leadership remains concentrated in one person, the practice will always be limited by that one person. This day challenges you to step into a different role — not just as a clinician, but as a leader responsible for building something that can grow beyond you.

Raising the Standard — How Leaders Think and Show Up

On Day 2, you will also be challenged to elevate how you think. Growth is not constrained by effort — it is constrained by thinking. You will explore what it means to move beyond incremental progress and begin operating with a billion-dollar mindset and a trillion-dollar focus. This is not about revenue. It is about how you define standards, how you see possibility, and how you commit to execution.

You will begin to see that leadership is not what you say once — it is what you reinforce consistently. It lives in how you run your alignment meetings, how you communicate expectations, and how you hold standards over time. And most importantly, you will begin to understand that leadership is not reserved for ownership. It exists within every role, and the future of your practice depends on how that leadership is developed and expressed.



The Economics of Living — Understanding the Life You Are Designing

At the center of Day 2 is a powerful realization: money is not numbers — it is the story of your life and the choices you make. You will move through a journey from story to principles to reality, exploring how your beliefs, decisions, and assumptions about money are shaping both your practice and your life.

You will begin by seeing yourself in the story — recognizing patterns you may have never questioned. From there, you will explore the principles of Respect, Wealth, and Freedom, and begin to understand why more is not always more. You will then confront the assumptions that quietly guide your decisions — about income, security, and the future — and replace them with clarity.

Through the concept of the Freedom Number, you will begin to see what your life actually requires. And through the idea of the Economic Battery, you will understand what is truly powering your life. This is where the shift happens: freedom is not about shrinking your life — it is about designing it intentionally and building the structure that allows it to exist.

Building the Right Team — Recruiting, Developing, and Retaining Great People

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From Understanding to Ownership of Success — The Shift That Changes Everything

By the end of Day 2, you will no longer just understand what to build — you will understand what it takes to build it. You will see the level of leadership required, the responsibility of aligning people and systems, and the connection between the practice you are building and the life you are living.

What began as clarity on Day 1 becomes ownership of success on Day 2.

And that ownership changes everything.



What You Will Gain on Day 2

- ▶ A clear understanding of why your current leadership system is the true ceiling of your practice
- ▶ The ability to shift from clinician to architect success — building a system that can scale your success
- ▶ A new standard of thinking through a billion-dollar mindset and trillion-dollar focus
- ▶ Practical tools to lead through alignment, cadence, and consistent reinforcement of standards
- ▶ A deep understanding of how your financial beliefs and decisions are shaping your life and practice
- ▶ Clarity on your Freedom Number and how to design a path toward real freedom
- ▶ A framework for strengthening your Economic Battery — the engine that powers your life
- ▶ Insight into how to recruit the right people based on alignment, not just skill
- ▶ A clear approach to developing your team through intentional training and leadership
- ▶ Understanding how to retain great people by aligning their role with their growth and life goals
- ▶ A practical view of compensation — how to make it fair, transparent, and performance-driven
- ▶ The ability to build a practice that supports both high performance and lifestyle alignment



DAY 3

OWNERSHIP OF SUCCESS IN AN INTELLIGENT, ALIGNED SYSTEM

The World Has Changed — And Now It Must Come Together

By Day 3, you have already done the hard work.

On Day 1, you gained clarity.

On Day 2, you took ownership of success.

Now, the question becomes:

How do we bring it all together — and make it real?

Because the world you are operating in has changed.

We now live in a world shaped by data, intelligence, and rapidly evolving tools. There are co-pilots, agents, and systems that can process information faster than ever before. And yet, despite all of this advancement, most practices still experience the same challenges —

inconsistent execution, fragmented systems, and leadership that remains dependent on individuals.

The gap is not technology. The gap is integration.

Day 3 introduces a shift in thinking: leadership is no longer just something we carry — it is something we can now strengthen through intelligent systems that support better decisions, deeper awareness, and more consistent alignment. The goal is not to replace leadership, but to enhance it, so that what we have built over the first two days can begin to operate at a higher level.

From Insight to Alignment — The Leadership Team Seeing the System Clearly

Over the past two days, and through the breakout work, the leadership team has already explored the systems that drive the practice — the patient journey, the referral journey, and the moments that define success.

Now, that learning is brought back into the room.

Because insight alone does not create change.

Alignment creates change.

This is where the leadership team — the staff who carry the systems every day — begin to see the system clearly, together.

What may have previously felt disconnected begins to come together. The system becomes visible, not in theory, but in reality — through the people who execute it every day.

This is where ownership of success deepens.

Because when the system is clear to the leadership team...

***It becomes something
they can fully own.***



From Alignment to Ownership of Success — Activating the System

With clarity comes responsibility.

And on Day 3, that responsibility becomes ownership.

Not ownership of tasks, but ownership of success.

Each role within the leadership team begins to see itself differently. The Practice Success Director is no longer coordinating activity but owning alignment and daily performance. The Treatment Consultant is no longer supporting the process but owning clarity and patient commitment. The Strategic Growth Partner is no longer visiting practices but owning the growth and depth of the referral ecosystem.

And the specialist?

No longer carrying the system alone.

Instead, leading a system of leaders — each responsible for a critical part of the outcome.

This is where the practice begins to change in a fundamental way. Accountability becomes natural, not enforced. Execution becomes consistent, not effort-driven. Growth becomes scalable, because it is no longer dependent on one person's capacity.

Ownership of success is no longer an idea.

It becomes the way the practice operates.

From Activity to Ecosystem — Where Ownership Extends Outward

As ownership of success takes hold internally, it begins to extend outward.

As ownership of success takes hold in the leadership team, it begins to extend into the ecosystem.

Because growth is not created through isolated actions. It is created through aligned systems that extend beyond the walls of the practice.

Referral relationships are no longer seen as individual efforts or scheduled visits. They become part of a broader ecosystem — one that is shaped by consistency, clarity, and trust. Every interaction reflects the same standards, the same intent, and the same level of alignment carried by the leadership team.

When this happens, growth becomes more predictable.

Not because more effort is applied, but because the system itself is working.

***And that system — internally and externally —
is aligned and owned.***



From Understanding to Execution — Making It Real

This brings us to the final step.

Because understanding and ownership, on their own, are not enough.

Without execution, nothing changes.

This is where everything comes together through structure.

The Action Planner becomes the bridge between intention and reality — not simply as a tool, but as a way of thinking. It allows the leadership team to take what has been learned, define what matters most, assign ownership clearly, and begin moving forward with purpose.

Execution no longer feels overwhelming.

It becomes focused. Measured. And repeatable.

Progress happens the way it always does — one system at a time, one leader at a time, one decision at a time. But now, it happens within a structure that supports it, and within a team that is aligned around it.

What Day 3 Creates

By the end of Day 3, everything connects.

What began as clarity has become ownership.

What became ownership has now become alignment.

And that alignment now moves into execution.

You are no longer operating as individuals within a practice.

You are operating as an integrated leadership system.

A system that is:

- ▶ Clear in its identity
- ▶ Aligned in its roles
- ▶ Owned in its outcomes
- ▶ And supported by intelligent structure

This is what allows success to become consistent.

And ultimately, inevitable.



What You Will Gain on Day 3

- ▶ A clear understanding of how intelligent systems can enhance leadership and decision-making
- ▶ The ability to integrate patient, referral, and leadership systems into one aligned structure
- ▶ A deeper understanding of ownership of success across the leadership team
- ▶ Clarity on how alignment transforms insight into consistent execution
- ▶ The ability to build a referral ecosystem that is structured, consistent, and scalable
- ▶ A practical framework to convert ideas into action through focused execution
- ▶ The confidence to return to your practice aligned, resourced, and ready to lead together

**Ownership of success creates alignment among the leaders.
Alignment drives execution at every level of the practice. Execution
makes success inevitable for the tribes.**