

The Journey to Mastery:

Clarifying Purpose, Uniting Teams, Accelerating Success



**THE
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DENTAL ODYSSEY
The Moonshot Practice



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How do we take our ambitious vision to the next level? This workshop is dedicated to deepening our clarity of purpose, reconnecting profoundly with our core values, and aligning as a unified, motivated team. Together, we'll refine the essential strategies, develop systems that reinforce those strategies, and implement effective tactics that move us consistently toward joyful achievement. By clarifying exactly where we've been, who we truly are, and where we intend to go, we ensure that our journey toward mastery is not only successful but also filled with passion, joy, and profound fulfillment.

SESSION 1

Defining Vision and Strategy

Building Leadership That Lasts

In the absence of clarity, systems drift, habits dull, and great intentions crumble under daily demands—so Session 1 centers on two anchors that keep leadership on course: Vision, the higher belief that gives meaning to everything we do, and Strategy, the philosophy that turns that belief into daily action. We'll open the hidden door, dust off the buried blueprint, and start building with intent.

Walk Away With

- ▶ A working definition of Vision—plus the first draft of yours
- ▶ A clear grasp of Strategy as philosophy—not just plans or tactics
- ▶ Five guiding Strategies that connect belief to action
- ▶ A framework to align culture with your highest purpose
- ▶ Deeper clarity on how intentional leadership shapes everything you build

SESSION 2

Building Strategy Into Patient Experience

Turning Vision Into Movement, One Moment at a Time

A breathtaking Vision fades fast if it never reaches the front desk.

Session 2 drags strategy out of the clouds and plants it in every heartbeat of the patient journey—from the first curious click to the final celebratory goodbye.

You'll learn how leadership shows up not in slogans, but in handheld moments: the pause before a question, the warmth behind a hand-off, the clarity of a treatment map. We'll give you the blueprint that turns belief into behavior, so your culture breathes through every interaction—seen, felt, and trusted by patients, referring doctors, and your own team.

This is not another workflow tweak. It's a new operating system for trust.

Walk-away Value

- ▶ The 12-Month Journey Map – A step-by-step visual that makes excellence inevitable from first call to post-treatment follow-up.
- ▶ Behavior Translation Guides – Quick-fire examples that convert lofty ideals into daily micro-actions anyone can execute.
- ▶ Ready-to-Use Tools & Scripts – Checklists, conversation frameworks, and decision-bridge scripts that hard-wire leadership into routine tasks.
- ▶ Moment-Driven Trust Builders – Tactics for turning check-ins, hand-offs, and introductions into loyalty-multiplying touchpoints.
- ▶ Specialist–GP Synergy Language – Precision phrases and actions that tighten the triangle of trust between patient, specialist, and referring doctor.
- ▶ Live Leadership Loop – A simple accountability system that makes high-level intent visible, measurable, and repeatable across the team.

Outcome: Walk out with a living blueprint that lets your Vision speak fluently through the patient experience—no extra hours, just extra impact.

SESSION 3

The Leadership Framework

Mastering Seasons, Systems, and Self-Momentum

- ▶ A practice never outgrows its leader. When you stall, so does everything you steer. Session 3 turns that tension into traction by charting the four seasons every leader cycles through—Launch, Build, Scale, Renewal—and showing you exactly how to pivot before growth becomes gridlock. You'll learn to fuse personal clarity with operational muscle, so strategy isn't something you write; it's something you breathe. From upgrading mindsets to fortifying systems, this session is the compass that aligns who you're becoming with what your practice is becoming.
- ▶ This isn't more theory. It's an operating system for unstoppable leaders.

Walk-way Value

- ▶ **The 4-Season Leadership Map** – A one-glance visual that pinpoints your current season and prescribes the next high-leverage move.
- ▶ **Vision-to-Self Converter** – A plug-and-play template that translates the shared Moonshot vision into a personal charter you can act on daily.
- ▶ **5 Core Systems Stress Test** – Rapid-fire audit for Patient, Referral, Leadership, Time, and Execution systems to expose (and fix) hidden drag.
- ▶ **Leadership Zone Protocols** – Micro-routines that lock you into clarity, compassion, and momentum—even on chaotic days.
- ▶ **Success & Happiness Dials** – Twin metrics that keep pursuit (winning) and presence (well-being) in balance, preventing burnout before it starts.
- ▶ **Crucial Moment Language Pack** – Precision scripts to name, frame, and lead through pivots so uncertainty converts into shared confidence.
- ▶ **Outcome:** Walk out with a living framework that evolves as you do—keeping you grounded when storms hit and fearless when opportunities explode.

SESSION 4

Leading Yourself First

Building the Foundation of Sustainable Leadership

True leadership doesn't start in the boardroom; it starts in the mind. Session 4—**Leading Yourself First** drills into the Three Disciplines of Internal Leadership: **Setting** the Mind (priming the day with gratitude and identity), **Filtering** the Mind (protecting the Leadership Zone from noise), and **Focusing** the Mind (anchoring attention on what matters most). Through a proven morning routine, real-time demonstrations, and practical neuroscience, you'll build an inner operating system that keeps clarity high, distractions low, and leadership energy flowing all day. This is the foundation every other skill stands on—because you can't lead others until you master leading yourself. **We'll close by modeling a 20-minute Morning Meeting that shows how an aligned mindset can synchronize the entire team before the day begins.**

Walk Away With

- ▶ A working mastery of the Three Disciplines: Setting, Filtering, and Focusing the Mind
- ▶ A plug-and-play Morning Practice template that locks in clarity, gratitude, and momentum within the first five minutes of the day
- ▶ Systems and cues to filter digital + environmental noise and safeguard your Leadership Zone
- ▶ Focus protocols that reset attention every 90–120 minutes, boosting execution by over 25% real-world demonstration of leadership energy in action via the Morning Meeting model
- ▶ A 20-minute Morning Meeting script you can deploy to align and energize your team each day
- ▶ A personalized plan to cultivate resilience, presence, and purposeful identity—day after day

Outcome: Walk out with an internal leadership operating system and a daily 20-minute alignment ritual that multiplies clarity, energy, and execution across your team.

SESSION 5

From Remarkable Care to Trusted Network

Building a trusted network

Designing exceptional care is no longer the finish line—it's the launchpad. Session 5—From Remarkable Care to Trusted Network reveals how a single, well-orchestrated moment can ripple outward, forging neurochemical trust loops that convert gratitude into advocacy. You'll master emotional excellence—the deliberate shaping of experiences so resonant they become stories people can't help but retell. We'll dissect the psychology of Status, Affiliation, and Fear of Loss, then layer in narrative structure, micro-gesture design, and precision follow-up so every patient and GP interaction feels “one-of-one.” By engineering these conversation catalysts and tracking their spread through your community, you'll transform isolated acts of care into a self-propelling referral flywheel.

Walk Away With

- ▶ A clear definition of emotional excellence and how it forges an authentic, memorable brand
- ▶ Practical methods for turning singular care moments into referral-worthy stories
- ▶ Ethical playbooks for activating Status, Affiliation, and Fear to multiply trust and referrals
- ▶ A design template for crafting “one-of-one” experiences that ignite word-of-mouth
- ▶ Guidelines to tailor every patient and GP touchpoint, building a vibrant, self-propelling community
- ▶ Conversation Cascade Model — a step-by-step framework to seed, script, and amplify patient stories across digital and face-to-face channels
- ▶ Referral Framework — a simple way to review emotional resonance and network growth in real time

Outcome: Walk out with a repeatable roadmap that turns remarkable care into a living network—where every delighted Patient and Referring Doctor becomes a champion, every champion attracts many more, and trust compounds into unstoppable growth.

SESSION 6

From Program to Presence

Scaling Trust with the Medallion Referral System

A robust referral network isn't built on good intentions; it's engineered through rhythmic, high-impact presence. Session 6 dissects the Medallion Referral System—a structured approach that converts strategic focus into compounding trust. You'll master the 20-60-20 Lens for segmenting your network, deploy the Engagement Matrix to move partners toward “80 % Outstanding,” and run the seven-step Practice Visit Playbook that turns every interaction into measurable momentum. From pre-visit reconnaissance to post-visit elevation, you'll learn how Clinical Collaboration, Education, Relationship & Recognition, and Program Activation visits weave together into a cadence that says, “I see you,” and proves it with value. By the end, presence is no longer random; it's a scalable system that keeps trust growing long after the handshake.

Walk Away With

- ▶ A complete blueprint of the Medallion Referral System and how each component compounds trust
- ▶ The 20-60-20 Lens for focusing resources on the partners who move the growth needle fastest
- ▶ The Engagement Matrix for steering every relationship toward the “80 % Outstanding” tier
- ▶ A seven-step Practice Visit Playbook—from pre-visit prep to follow-up—that turns visits into velocity
- ▶ Cadence planning tools to schedule annual, quarterly, monthly, and daily touchpoints with intention
- ▶ Four High-Impact Visit Families (Clinical Collaboration, Education & Capability Building, Relationship & Recognition, Program Activation) and when to deploy each of the 14 meeting type
- ▶ The Know-Connect-Elevate checklist for personalizing every encounter and capturing next-step commitments
- ▶ A simple Referral Tracking Framework that monitors emotional resonance and network growth in real time

Outcome: Walk out with a living referral engine—where deliberate, well-timed presence scales trust, deepens partnerships, and accelerates sustainable practice growth.

SESSION 7

From Tap to Trust: Engineering the Referral Flywheel

Turning daily micro-actions into unstoppable partnerships

A referral isn't a hand-off—it's the moment your system is most vulnerable. Session 7 exposes every weak link and shows you how to weld them into a seamless flywheel. We begin by mapping the Referral Spectrum—six pathways to becoming “the one” specialist GPs trust above all. Then we operationalize the Tap–Touch–Turn cadence, elevating it from casual check-ins to a rhythmic growth engine. You'll diagnose failed-referral loops, replace automation shortcuts with presence, and climb the Gold Medallion Partnership ladder one intentional move at a time. By session's end, daily actions align into a pathway that compounds goodwill, stories, and referrals—spinning faster every time you show up on purpose.

Walk Away With

- ▶ The Referral Spectrum Map that pinpoints six pathways to “specialist of choice” status
- ▶ A Tap–Touch–Turn playbook of daily, weekly, and monthly micro-actions that deepen trust
- ▶ The Gold Medallion Partnership ladder with triggers, milestones, and metrics for ascent
- ▶ A Failed-Referral Loop diagnostic to spot and seal gaps in hand-offs and follow-through
- ▶ The Presence-over-Automation checklist to keep every interaction human, valued, and remembered
- ▶ Conversation Catalyst toolkit that turns moments of care into shareable stories and social proof
- ▶ A Referral Flywheel tracking framework to link micro-actions with measurable network growth

Outcome: Walk out with a flywheel blueprint that transforms everyday presence into exponential partnerships—where each deliberate tap accelerates trust, each touch multiplies visibility, and every turn locks in lifelong advocates.

SESSION 8

From Planning to Execution:

Your AI-Powered, Cloud-Based Action Planner

The first seven sessions gave you the what and the why—Vision, Strategy, Patient & Referral Systems, Leadership, and the Tap-to-Trust flywheel. Session 8 opens the how, taking you inside the **Action Planner**: an **AI-based, cloud-based dashboard** that converts every big idea into a living, step-by-step plan. Think of it as your practice's command center. You'll learn how to choose a template—whether it's the full Patient Experience System, a Morning-Meeting ritual, or a Referral-Community rollout—custom-fit it to your team, assign each micro-step, and track progress together. The platform surfaces the exact resources you need, shows who owns what, and zooms your focus down to just the next 30 days, making bold goals bite-sized and doable. Leaders can review the dashboard monthly, celebrate wins, clear bottlenecks, and green-light the next system once the current one is running smoothly. In short: planning meets execution, self-accountability meets shared accountability, and momentum compounds because everyone can see it.

In This Session, You Will Walk Away With

- ▶ **A live tour of the Action Planner dashboard**—how to navigate projects, timelines, and resource libraries.
- ▶ **Plug-and-play system templates** for the Patient Experience, Morning Meetings, Referral Community, and more—ready to customize in minutes.
- ▶ **Step-assignment & timeline tools** that clarify who does what, by when, with automated nudges that keep everyone on pace.
- ▶ **“Next-30-Days” focus mode**—a planning lens that shrinks overwhelm and turns lofty initiatives into weekly wins.
- ▶ **Master-resource integration**—direct links to scripts, checklists, and guides surfaced exactly when you need them.
- ▶ **Leader dashboards & progress analytics** to review implementation status, unblock bottlenecks, and celebrate momentum.
- ▶ **Accountability loops**—built-in check-ins and reflection prompts that strengthen self-accountability and team accountability simultaneously.
- ▶ **A repeatable execution playbook** so you can spin up new systems (or refine existing ones) long after the workshop ends.

Outcome: You'll leave with a personalized, ready-to-run Action Planner workspace—your bridge from insight to impact, where every system lives, breathes, and improves week after week.

SESSION 9

Time Is a Mirror: Designing a Schedule That Reflects Your Vision

Your calendar is a truth-teller. Today's blocks are yesterday's choices made visible, and tomorrow's results already taking shape. But results don't start with numbers—they start with absolute clarity about how you want each day to feel and flow. First, define what clinical excellence looks like, then script a rhythm that keeps you energized, passionate, and fully present with every patient. When the whole team understands that blueprint—how each block supports the care standard, how hand-offs keep momentum, how buffers protect sanity—revenue goals become the natural by-product rather than the driver. In this session we treat time as the ultimate mirror, then show you how to polish it: architecting a template that projects the practice you mean to build, sustaining it through disciplined review and micro-shifts, and refining it in specialty breakouts for periodontists, oral surgeons, and endodontists so every detail reflects your unique clinical reality.

In This Session, You Will Walk Away With

- ▶ **The “Mirror Diagnostic”** – a quick reflection exercise that surfaces hidden friction in the current schedule and highlights where time betrays intent.
- ▶ **Block-Building Playbook** – how to create focused clinical blocks, consult windows, and flexible buffers that honor both patient flow and team energy—without racing the clock.
- ▶ **Template Clarity** – patient-vs-doctor time, role assignments, and step-by-step guidance on evolving from 15-minute to 10-minute granularity as mastery grows.
- ▶ **Cascading-Slot Method** – a frontline habit for reviewing open time weeks ahead and seeding it with the right cases, so the future never “looks empty.”
- ▶ **Contingency & Overflow Guardrails** – built-in buffers for emergencies, overruns, and “Flex Fridays” that keep the week resilient without stealing momentum.
- ▶ **Specialty Breakout Labs** – guided breakouts for periodontists, oral surgeons, and endodontists to adapt block templates, role assignments, and contingencies to their unique clinical flow.
- ▶ **Team-Alignment Rituals** – morning huddles, weekly front-desk touch-points, and monthly business reviews that keep the template a living promise rather than a static grid.

Outcome: You'll leave with a clear understanding of how to build a templated, delegation-ready schedule that your team and you can continually modify as you learn each day that goes by until the rhythm and “flow” takes over.

SESSION 10

Making It Count: Converting Momentum into Legacy

Three days of vision, strategy, systems, and scheduling have built a powerful current. Session 10 turns that current into a lasting channel. We pause to look in the mirror of our **community's energy**, anchor happiness to success, set shared benchmarks, and codify the leadership habits that keep progress compounding long after the workshop ends. By weaving reflection with forward planning—in team and clinician breakouts and inside the **Annual Planner**—we ensure that every insight counts, every action aligns, and every next step is owned together.

In This Session, You Will Walk Away With

- ▶ **A community snapshot** that captures the collective commitment and reminds you why shared momentum matters.
- ▶ **The Happiness × Success framework**—linking subjective well-being to purposeful pursuit so drive never outruns joy.
- ▶ **The Bannister Mindset Model**—a story-driven lens showing how one breakthrough reframes what's possible for everyone.
- ▶ **Benchmark mastery**—how to use clear, collaborative targets as a compass (not a ceiling) and rally the team toward the next milestone.
- ▶ **Dual learning tracks for October**—a System-workshop path for teams and a Clinical-leadership path for doctors, chosen by the group's own priorities.
- ▶ **Annual Planner deep-dive**—a year-at-a-glance dashboard that:
 - ▶ starts with “Where do we want to be 12 months from now?”
 - ▶ breaks that vision into four quarters, treating each quarter like a self-contained “mini-year,”
 - ▶ stages goals quarter-by-quarter so progress compounds,
 - ▶ translates quarterly goals into monthly waypoints and daily focus cues,
 - ▶ and links every objective to real-time progress bars inside the Action Planner—so you always know today's step toward the annual summit.
- ▶ **Five Leadership Attributes**—Plan Clarity, Ownership Discipline, Relentless Drive, Agile Dynamism, Collaborative Empowerment—each with concrete daily cues.
- ▶ **A legacy mindset** sealed by a fireworks finale: a shared commitment to turn every tap, touch, and template into impact that echoes well beyond the room.

Outcome: You'll close the workshop with a living scorecard, a clear leadership compass, and a quarter-by-quarter roadmap inside the Annual Planner—ready to transform workshop momentum into year-round legacy.



DAY 1 AGENDA

BREAKFAST

Time: 7:00 AM - 8:00 AM

Details: A networking breakfast to kick off the day, offering an opportunity for participants to mingle and set the tone for the day ahead.

SEGMENT 1:

Time: 8:00 AM - 9:45 AM

BREAK:

Time: 9:45 AM - 10:15 AM

Details: A short break to refresh and network.

SEGMENT 2:

Time: 10:15 AM - 12:15 PM

LUNCH:

Time: 12:15 PM - 1:15 PM

Details: Lunch break for informal discussions with your team and a bit of relaxation.

SEGMENT 3:

Time: 1:15 PM - 3:00 PM

BREAK:

Time: 3:00 PM - 3:45 PM

Details: Time to refresh and prepare for the final session of the day.

SEGMENT 4

Time: 3:45 PM - 5:30 PM (Remain Flexible)

DINNER:

Time: 6:30 PM - 9:00 PM

Details: Join us for a welcome dinner at La Hacienda at the Fairmont. This relaxed evening offers time to reflect on the day's insights, build meaningful connections, and collaborate with peers in a warm and inviting setting. Designed to foster relationships that will support your growth and vision.

DAY 2 AGENDA

BREAKFAST

Time: 7:00 AM - 8:00 AM

Details: A networking breakfast to start the day and gear up for another day of learning.

SEGMENT 1:

Time: 8:00 AM - 9:45 AM

BREAK:

Time: 9:45 AM - 10:15 AM

Details: A short break to refresh and regroup

SEGMENT 2:

Time: 10:15 AM - 12:15 PM

LUNCH:

Time: 12:15 PM - 1:15 PM

Details: Lunch break for informal discussions with your members and team, and a bit of relaxation.

SEGMENT 3:

Time: 1:15 PM - 3:15 PM

BREAK:

Time: 3:15 PM - 3:45 PM

Details: Time to refresh and prepare for the final session of the day.

SEGMENT 4:

Time: 3:45 PM - 5:30 PM

DINNER:

Time: 6:00 PM - 8:30 PM

Details: Dinner on your own, with your team. Use this time to collaborate, celebrate progress, and continue building your shared vision.

DAY 3 AGENDA



BREAKFAST

Time: 7:00 AM - 8:00 AM

Details: A networking breakfast to kick off the final day

SEGMENT 1:

Time: 8:00 AM - 9:45 AM

BREAK:

Time: 9:45 AM - 10:15 AM

Details: A short break to refresh and network.

SEGMENT 2:

Time: 10:15 AM - 12:15 PM

LUNCH:

Time: 12:15 PM - 1:15 PM

Details: Lunch break for informal discussions and a bit of relaxation.

SEGMENT 3:

Time: 1:15 PM - 3:15 PM

Details: This will be our final session as a group