



## Workshop One:

# Ambition Aligned – The Future is Now

## *Transforming Vision into Reality with Clarity and Confidence*

This first workshop is about envisioning a future without limitations — a future where ambition is met with structure, and potential is translated into performance. Over the next three days, you and your colleagues — visionary leaders committed to growth — will look at your practices through a new lens: one guided by clarity, discipline, and possibility.

Each of you arrives with a different story, a different data set, and a different ambition. Our role is to give you the resources, frameworks, and tools to analyze where you are, define where you want to go, and chart your own course forward. Through our AI-enabled platform and leadership diagnostics, you'll discover insights that reveal both opportunities and constraints — and you'll learn how to optimize them yourself.

From there, we'll equip you not just with the *mindset* of success but with the systems and strategies to transcend conventional thinking. This workshop provides the fuel for your rocket ship — the clarity, structure, and momentum that will propel your practice beyond its current boundaries. Supported by our ongoing webinars, coaching sessions, and digital tools, you'll leave with a data-driven plan and the confidence to execute it — not someday, but now.

### Day 1

## Part 1 — The Power of Possibility

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#### *From Limitations to a Three-Year Vision*

We begin our journey by expanding the way we think about what's possible. Too often, what limits growth isn't the size of our ambition — it's the lens through which we view it. When we zoom out, we realize that every result we want already exists somewhere in this room or within our broader community. If it's possible, it's being done. The question is no longer “*Can it be done?*” but “*How will we do it?*”

In this session, we'll take a structured look at possibility. You'll explore where your practice stands today, what benchmarks show is achievable, and what would have to change in your leadership, your systems, and your mindset to reach the next level.

We then project three years out — far enough to free

our thinking from daily constraints, yet close enough to make it real. Once that vision is clear, we bring it back to today, because every three-year success is built one year, one quarter, one step at a time. You'll learn how to begin reverse-engineering your ambition — because the answer is the answer. By keeping your eyes fixed on the three-year vision, you'll discover how to achieve it one quarter at a time, one step at a time. Every great success is achieved exactly this way — one day at a time, one month at a time, one quarter at a time — because revenue is never the goal; it is the result of doing the right things consistently.

***Clarity turns ambition into momentum — one quarter, one step, one day at a time.***



## Part 2 — The Architecture of Success

### *Defining the Roles, Culture, and Indicators that Create Value*

If Part 1 is about what's possible, this part is about what makes it possible. Every successful practice rests on clarity — clarity of purpose, of roles, and of contribution. Success doesn't happen by accident; it's engineered through alignment.

For any practice to grow, the roles that create value must be clearly understood and deeply respected. There is the role of the leader, the clinician, and the team — and within those, distinct layers of influence: treatment coordinators, assistants, administrative leads, and operations managers. Each person holds a different form of responsibility, but all share a common purpose — to advance the practice toward becoming the *specialist of choice*.

In this session, we'll explore the **five key value roles** that exist in every thriving practice and learn how to view your team through this structure. You'll see where leadership should drive, where support should stabilize, and where collaboration creates flow. You'll identify the *drivers of success* — those whose actions directly influence growth — and the *supporters of success* — those whose consistency makes growth sustainable.

But clarity of roles isn't enough. Every great team also knows **what to measure**. In every practice, there are dozens of potential indicators — case acceptance, number of new patients, referral patterns, case types, case values, production per day, chair utilization, and more. The truth is, not all indicators are equal.

We'll identify the four or five key indicators that matter most — the ones that, when consistently monitored, predict the overall health of the practice. You'll learn how to translate these metrics into shared awareness across your entire team, so that every person understands not only what is being measured, but *why it matters*. Using Moonshot's proven benchmarks and data gathered from high-performing members, you'll see what's possible when those indicators become part of the daily rhythm of leadership and alignment.

By the end of this session, you'll see your practice as an ecosystem of value — one where roles are defined, habits are intentional, and the right indicators provide real-time clarity. It's how high-performing teams think, act, and lead — optimizing the natural capacity of their facility, their team, and themselves.

***Excellence is simple: when everyone knows their role and focuses on what truly matters, alignment becomes unstoppable and revenue is a byproduct.***

## Part 3 — The Leadership Framework

### *Connecting Happiness and Success Through Vision, Strategy, and System*

Everyone begins with a dream — a vision so clear it fuels everything we do. But over time, that dream starts to fade. Life takes over. Responsibilities grow. The days get busier. And in the process, what once inspired us becomes buried under the weight of what simply needs to get done.

As specialists, most of us never set out to be leaders. We became **accidental leaders** — driven by our craft, committed to excellence, yet constantly navigating challenges we were never formally trained to manage. Somewhere along the way, we built successful practices, but many of us lost connection with the blueprint that once guided us.

We've gone from course to course, workshop to workshop, book to book — collecting ideas and tactics that never seem to fully stick. Not because they weren't valuable, but because they weren't anchored to a unifying framework. Without that framework, everything remains fragmented.

In this session, we'll rediscover the architecture of leadership — a framework that reconnects your dream to your daily reality. We'll begin by defining the two forces that shape every leader's life: **happiness** and **success**. Happiness is gratitude — the ability to love life as it is. Success is ambition — the drive to reach for what could be. One grounds us; the other propels us. And without balance, they can easily conflict.



We'll explore how to connect these forces through the **Leadership Framework** — anchored by happiness on one end, success on the other, and a vital space in between called *the Leadership Zone*. This is where energy, focus, and fulfillment align.

You'll create your own version of this framework — beginning with your personal vision, defining what happiness and success mean to you, and establishing the boundaries of your **Leadership Zone**. Then, we'll introduce the five Leadership Strategies that allow happiness and success to move in the same direction, and the five **Leadership Systems** that operationalize those strategies within your practice.

Finally, we'll connect all of this to the purpose of goals. Because goals alone do not transform us. Transformation happens when goals live inside a clear context — when every goal is guided by vision, supported by systems, and aligned with your own definition of happiness and success.

By the end of this session, you'll see leadership as the architecture of your life — a way of thinking and living that brings your original dream back into focus and gives it the structure to thrive.

*True leadership lives in the space where happiness and success move in the same direction.*

## Day 2

### Movement by Design

*Turning Vision into Momentum, One Moment at a Time*

#### Part 1 — The Patient System

*Designing the Experience that Makes You the Specialist of Choice*

We are specialists. Patients come to us not by chance, but through trust — trust from their general dentist, from friends and family, or from the reputation we've built in our community. By the time they arrive, they already know they need specialty care. They know it will require time, investment, and commitment. That awareness changes the expectation: it gives us permission to lead with clarity, empathy, and confidence.

But our responsibility goes beyond clinical excellence. Every practice must also have a **patient vision** — a clear picture of the emotional and practical experience we want every patient to have, from their very first impression to the moment their treatment is complete. And that vision needs protection.

The protection comes from the **five Leadership Strategies**—brought to life through the daily systems that carry our vision forward. When those strategies

breathe within the *Patient System* and the *Referral System*, they work together to define who we are as specialists. Because when both are built with intention, they do more than deliver care — they create a culture of trust that makes you the *Specialist of Choice*.

Systems are the engines that deliver that trust. But over time, even the best engines drift. Familiarity breeds shortcuts. Repetition replaces reflection. Reputation becomes habit. And the systems that once defined our standard become invisible. In this session, we bring them back into focus — not to tweak them, but to reimagine them.

We'll reconnect your practice vision and strategies to the lived experience of your patients and your referring practices. You'll learn how to design every moment — not just the visit, but the *impression it leaves*. Leadership shows up not in slogans, but in the subtle spaces between actions: the pause before a



question, the warmth behind a handoff, the clarity of a treatment plan, the speed and tone of your follow-up, and the way you communicate outcomes back to the referring doctor.

This is how vision becomes visible. The system turns belief into behavior. The experience becomes the culture — seen, felt, and trusted by patients, referrers, and teams alike.

As we rebuild your Patient System, we'll draw from ready resources — frameworks, scripts, and checklists that make the invisible visible again. You'll learn to view every point of contact as a *trust builder*:

every check-in, every handoff, every follow-up. Because when trust flows between the patient, the team, and the referring doctor, the result is not only case acceptance — it's partnership, loyalty, and momentum.

And as we prepare for Workshop Two, we'll layer this system with our **agentic tools** — automating how you communicate, report, and celebrate results with both patients and referrers. Together, they form the true engine of sustainable growth.

*Design the experience that earns trust — because trust is what makes you the specialist of choice.*

## Part 2 — From Remarkable Care to Trusted Network

### *Designing the Referral System that Builds Enduring Partnerships*

In specialty practice, remarkable care is only the beginning. The true measure of leadership lies in the network of trust we build around that care — the referring doctors, their teams, and the community that depends on our expertise.

Every great specialist understands this: the practice doesn't grow through marketing — it grows through relationships. And within every network of 50, 80, or even 100 referring doctors, the majority of referrals — often 70 percent or more — come from just a small group. These are your **premium relationships**, the heartbeat of your practice. Imagine if instead of 10 to 15, you had 20 to 30 of those relationships at that same level of trust and confidence. You wouldn't need to find more referrers — you would simply deepen the relationships that already exist.

Truly understanding the **ecosystem of your referrers** is where mastery begins. Each referring doctor's office has its own dynamics — the clinicians, the treatment coordinators, the administrative staff — each playing a part in the story of trust. Designing a **Referral System** means creating a rhythm that connects them all, ensuring that every touchpoint with your practice reinforces confidence, clarity, and care.

Our goal is simple: to become the **go-to specialist** in your community. Not only for clinical excellence, but as a trusted partner — the one they turn to when cases are complex, when timelines are tight, or when they simply need reassurance. To be the practice that not only delivers outstanding outcomes, but also helps their teams grow through **lectures, study clubs, and shared learning experiences**.

The challenge isn't willingness — most specialists already care deeply about their relationships. The challenge is organization. The effort is often scattered, unstructured, dependent on memory or moments of inspiration. That's why we created the **Medallion Program** — an outreach framework designed to systematize connection and elevate consistency.

Much like your Patient System, the Referral System becomes an operating system of its own — one that's intentional, orchestrated, and built on trust. Every touchpoint — every thank-you, every update, every conversation — is designed, not left to chance. The Medallion Program ensures your best referrers feel that design in every interaction:



- They receive timely consult notes and progress updates that reinforce confidence.
- Their teams experience appreciation and recognition, not just their doctors.
- They are invited into education, collaboration, and feedback — not as an obligation, but as a partnership.

And while many specialists understand the value of being patient-centered, the missing link has always been how to remain *present in the GP practice* without physically being there. That's where this program changes everything. We've designed **16 possible clinical and value-based meetings** that can take place at the referring practice — purposeful interactions that strengthen connection and create shared learning. When a team member is dedicated

to growth — much like a treatment coordinator is dedicated to the patient experience — this system gives them a clear path. The reason most outreach fails is not intent, it's structure: there's no care plan, no Medallion framework, no tools or resources to sustain the effort. This program provides all three — giving your team the clarity and confidence to lead these visits with purpose and consistency.

Through this work, we transform outreach into something deeper — an ongoing expression of leadership. Because when every referrer feels seen, valued, and supported, you no longer compete for referrals — **you earn advocacy**.

And advocacy is the highest form of trust.

*When the level of clinical excellence is matched by the level of relationship excellence with referring doctors and the community at large, you truly become the go-to specialist — for them and for the patients they serve.*

### Part 3 — Leading Yourself First

#### *The Foundation of Sustainable Leadership*

Everything we've built so far — the patient system, the referral system, the leadership framework — depends on one truth: you cannot lead others until you learn to lead yourself.

True leadership doesn't begin in a boardroom or a morning huddle; it begins in the mind. The way we think, filter, and focus determines how we show up for our teams, our referrers, and our patients. Leading yourself first means mastering the internal disciplines that protect your energy, shape your perspective, and allow you to respond rather than react.

And here's the principle: when you know what truly matters — where to place your time, focus, and energy — and when you surround yourself with team leaders who share your values and vision, growth stops feeling like a burden. It becomes exciting. Because when your systems are strong and your team is aligned, you're no longer carrying the

practice alone; you're leading it together. Each leader grows others, supports others, and in doing so, amplifies their own capacity.

This part of the workshop is about building your **inner operating system** — the habits, mindsets, and routines that keep you centered in a noisy world. You'll learn the **three disciplines of internal leadership**:

- **Setting the Mind** — Creating clarity at the start of each day. Anchoring to purpose before the world's demands begin.
- **Filtering the Mind** — Choosing what deserves your attention and what doesn't. Protecting the leadership zone from unnecessary noise.
- **Focusing the Mind** — Sustaining presence and intention through the day; directing energy toward what matters most.



Through neuroscience-based demonstrations and simple morning rituals, you'll see how small practices can shift your physiology and mindset in minutes — keeping clarity high, distractions low, and energy steady throughout the day.

Because leadership isn't about being busy; it's about being intentional. It's about loving the journey, staying passionate in the process, and remaining calm in the face of constant change. The demands of personal life, professional life, patients, teams, and referring doctors will always compete for your attention. Without a system to center yourself, it's easy to get lost in the noise and forget what matters.

You'll learn that life — and leadership — always divides itself into thirds: about **20 percent is extraordinary, 60 percent is good, and 20 percent is noisy**. The noise never disappears; it simply shifts.

What defines great leaders is how they handle that 20 percent. When we let the noise dominate, it expands; when we stay grounded in purpose and discipline, it contracts — leaving more space for what is extraordinary.

Leading yourself first is not about control; it's about alignment. It's the act of returning to center — again and again — so you can lead with clarity, authenticity, and joy.

This is the foundation every other skill rests upon, the core of sustainable leadership. Before you can influence others, you must learn to protect your own clarity — the one resource that multiplies everything it touches.

**The greatest leaders lead themselves first — their clarity is unwavering, their focus steady, and their leadership effortless.**

### Day 3

## Systems of Achievement

*From Vision to Execution: Building Alignment, Goals, and Action*

### Part 1 — Agreement Is Not Alignment

#### *Leading Teams Consistently and Turning Clarity into Collective Movement*

Over the past two days, you've shaped a clear vision, built the systems that carry it, and strengthened the inner discipline to lead yourself first.

Now we turn to the final bridge between vision and execution — **alignment**.

One of the greatest failures in leadership — and in life — is believing that *agreement equals alignment*. It doesn't. Words don't move teams. Actions do.

In most practices, the energy of clarity fades after the meeting ends. The ideas were good, the intentions sincere, but without rhythm, the vision drifts.

**Alignment** is what keeps clarity alive — it's the ongoing conversation between what we say and what we do.

When we put systems in place — when strategies and values are thoughtfully designed — the real challenge isn't creation; it's consistency. The failure rarely lies with the team. It lies in leadership's ability to keep those systems alive.

That frustration we all feel — the “*How many times do I have to tell you?*” — is not a team problem. It's a leadership problem.

Alignment sessions are the antidote. They are how we breathe life back into systems, how we normalize new habits until they become the culture itself.

Alignment is not a meeting. It's a discipline — a consistent rhythm that keeps your people connected to purpose, progress, and each other.

It transforms leadership from event-driven to habit-driven, ensuring that the momentum of the workshop becomes the momentum of the practice.



In this part of the workshop, you'll learn how to lead your team through **alignment sessions** that bring focus, energy, and accountability into every week. Each session — daily, weekly, monthly, and quarterly — serves a distinct purpose, but together they form one heartbeat.

- **Daily Alignment:** where the team begins each day connected, clear, and ready.
- **Weekly Alignment:** where priorities become commitments, and commitments become progress.
- **Monthly Alignment:** where systems are reviewed, lessons captured, and opportunities identified.
- **Quarterly Alignment:** where you step back to see the whole — ensuring every action still serves the vision.

As practices grow, so must the systems — and the habits that sustain them. Alignment sessions ensure both evolve together, matching the pace of your capacity, your team's growth, and the needs of your referring doctors.

These are not “meetings.” They are *alignment moments* — brief, intentional pauses that replace chaos with connection. Through these rhythms, teams learn to move in unison, to stay grounded in what matters most, and to adapt quickly without losing focus.

You'll experience the **framework and tools** that make this rhythm practical — resources, templates, and prompts that allow you to lead these sessions with ease and confidence. They'll help you turn what once felt reactive into something steady and dependable.

Because alignment is not about control — it's about trust. It's about giving everyone the clarity to lead from their role and the confidence to act on what matters.

And when alignment becomes part of the daily rhythm, something remarkable happens: The team stops needing constant direction. They begin to anticipate, to own, to move together. Clarity becomes culture, and culture becomes movement.

*Alignment is the force that multiplies your vision, reinforces your values, and keeps every system alive.*

## Part 2 — Direction & Discipline

### *Reframing Goal-Setting for a Life and Practice by Design*

Most people think of goals as destinations — numbers on a scoreboard, milestones on a calendar, production targets to be reached.

But the truth is, goals are not the destination. They are the *architecture of direction* — the framework that turns vision into motion.

That's why we teach goal-setting last.

Because until you have clarity of vision, alignment of systems, and mastery of self, goals are just noise — activity disguised as progress.

When we see goals through the wrong lens, they become weight. They create pressure, not purpose. We chase production instead of progress, and in doing so, we forget that outcomes are always the

result of something deeper — the consistency of our behaviors, the strength of our systems, and the rhythm of our leadership.

In this part of the workshop, we reframe goal-setting completely.

Goals are not promises to the marketplace; they are commitments to your future self. They describe not only what you want to achieve, but *who you must become* in the process.

We'll begin by looking back — reconnecting with the vision you built on Day 1 and the systems you refined on Day 2.

That vision is your north star; your systems are the path.



**Goal-setting is the bridge** — the process of designing how you will travel that path with discipline, clarity, and joy.

We'll explore three tiers of focus that keep growth sustainable:

- **Direction:** Your three-year horizon — what “better” truly means for your practice, your team, and your life.
- **Discipline:** The daily and weekly habits that keep progress alive. The measure of commitment is not size, but repetition.
- **Reflection:** The moments where you pause, recalibrate, and refine. This is where learning compounds.

You'll discover that great goals are not about reaching; they're about *aligning*.

When you align your goals with your systems — your patient system, your referral system, your leadership rhythm — production takes care of itself.

When you align your goals with your values, you stop chasing and start creating.

But here's where goal-setting becomes both art and science.

When you think three years out, you can't simply divide your destination into equal parts. Growth doesn't unfold in straight lines — it compounds. If you want to move from 800 patients a year to 1,200, you don't get there by adding 100 patients each quarter; you get there by *building capacity* that compounds — one day, one conversation, one relationship at a time.

The art is understanding where you want to land; the science is engineering the compounding steps that make it possible.

You build year three by building year one correctly — by focusing on what creates lift, not just what fills time.

Each quarter becomes a deliberate progression, and each day, a small proof of concept.

When you think this way, every action becomes an investment — in systems, in people, in trust — all compounding toward the future you envisioned.

This is how leaders achieve sustainably. They don't chase the future; they build it, patiently and precisely, one disciplined action at a time.

*Goals are not reached — they're compounded. One day, one system, one disciplined decision at a time.*

### Part 3 — From Clarity to Motion

#### *The Action Planner — Turning Systems into Mastery*

At this point in the journey, you've redefined vision, built your systems, learned to align your teams, and set goals with purpose and precision.

Now, we bring it all together — turning direction into *motion*.

Because what we really need isn't just more ideas. What we need is clarity — clarity about **what's next, who's responsible, and how we'll begin**.

Progress happens one step at a time, one system at a time, one team member at a time.

The **Action Planner** is the tool that makes this possible. It's how you take a vision and turn it into a

living plan — a system of execution that connects clarity to accountability.

The Action Planner allows you to take any system — Patient, Referral, Leadership, Time — and lay out a clear game plan to master it. It turns intent into structure, and structure into measurable progress.

Of course, throughout this workshop, you've gathered dozens of insights — what we call *nuggets*. They're valuable, and they create immediate momentum. But the real power doesn't come from nuggets; it comes from *systems*.

Because while nuggets create bursts of energy,



THE  
LEADERSHIP  
THREAD



DENTAL ODYSSEY  
The Moonshot Practice

systems create sustainable growth.

The Action Planner helps you focus that energy — ensuring that each quarter, you go deep on **one system**, while still moving forward on supporting initiatives that build momentum across the practice.

Each system you master adds another layer of strength — clarity improves, confidence compounds, and the practice begins to move in unison. And as each quarter builds on the one before it, mastery takes shape — not through leaps, but through rhythm.

You'll leave this session knowing **exactly what your next steps are** — which system you'll focus on first, which team members will lead, what success looks

like, and how progress will be measured.

The Action Planner becomes your bridge between inspiration and implementation — a roadmap that keeps every decision connected to the systems, goals, and vision you've built.

Because execution is not an event. It's a rhythm — a sequence of intentional steps that, when followed with discipline, create extraordinary results.

And when clarity becomes motion, you don't just move faster — you move forward with purpose.

*Mastery is built one system at a time, one quarter at a time,  
one clear action at a time.*