

PRACTICE GROWTH RETREAT

July 25, 2025

**Reaching Individual
Peak Performance**



WELCOME!



KEYS TO GETTING THE MOST OUT OF THIS RETREAT

- Return from breaks on schedule so you don't miss content - we'll be taking breaks at 11:20am, 1:20pm, and 3:40pm Eastern Time.
- Limit distractions, to the degree that's possible (we have noisy dogs and children in our lives too).
- Watch and participate as a team for the first part of the day. If possible, have a whiteboard and markers available for brainstorming.
- Have a lunch plan in advance, so you can eat during a scheduled break.
- Be ready with your personal Zoom-compatible device, charger and headphones for the role-specific breakouts in the second part of the day.

PEAKPOINTS

Are you in it to win it? And learn too...

TRACK YOUR PEAKPOINTS THROUGHOUT THE DAY

- Logged-in by 10:03am ET/7:03am PT (1 point)
- Camera on for at least an hour (1 point)
- Camera on for at least 2 hours (2 Points)
- Entire team attending together (2 points) + Bonus point for sending your coach a photo of your team
- Completed team Core Values exercise (2 points)
- Participated in Minute to Win It challenge (4 points)
- Returned from first break on time (1 point)
- Identified a metric you'll take ownership of (1 point)
- Returned from second break on time (1 point)
- Identified at least one hat, haircut, and tattoo for your practice (1 point)
- Returned from third break on time (1 point)
- Attended both role-specific breakout sessions (4 points)
- Asked a speaker a question (2 points)
- Can name the TTI partner who provides patient financing (1 point)
- Sent a picture of your action plan to your coach (5 points)

POINT TOTAL _____

OBJECTIVES

- Understand ownership mentality
- Create and implement core values
- Embed these values in daily operations

**Culture is not an initiative.
Culture is the enabler of all initiatives.**
- Larry Senn

CULTURE

Culture is the thought processes, mindsets, and behaviors of a particular nation, people, or other social group

KEY DRIVERS OF OWNERSHIP

- Cultural Foundation = Mission Statement, Strategic Plan, Core Values, Behaviors List.
- The team was involved in setting the foundation. People support what they help create.
- Leaders model the behaviors.
- There is feedback and recognition.

SYSTEMS THAT DRIVE OWNERSHIP MENTALITY

- Job role clarity – Who Owns What
- Scorecard – The Practice Success Loop, Analytics
- The Metrics are Transparent
- Team Involvement in Planning
- Team Accountability
- "Current Draft"
- Coaching for Growth – PDI's

TEAM EXERCISE: What is one thing you can own more fully in your role?

CORE VALUES

Core values enable us to come together with a shared mindset.

- Authentic, Not Just Aspirational
- Involve the Team
- Connect Values To Behaviors

**When your values are clear to you,
making decisions becomes easier.**

- Roy E. Disney

5 PART CORE VALUE FORMULA

1. One Word Value (4-6 Values)
2. Definition of Word
3. Behaviors
4. Stories That Illustrate the Value
5. Stories That Illustrate Not Having the Value

TEAM EXERCISE: Decide on One Value, Describe One Behavior That Demonstrates That Value, Decide on a Story About That Behavior

HOW DO WE USE THESE VALUES?

- Hiring: Value-based Interviews
- Onboarding: Culture Immersion
- Meetings: Values Shoutouts
- Reviews: Values Based Feedback on Behavior

CELEBRATING OWNERSHIP

- Create stories of team wins
- “LOVE” Awards
- Reinforce Ownership Mindset

SEVEN WAYS TO PAY

1. Pay
2. Bonus
3. Utilization of skills
4. Development - Mastery
5. Co-worker Quality
6. Recognition
7. Time Off

Leadership - Everyone Living the Values

ACTIONS TO TAKE

- Have a values conversation. Choose your 4-6 values.
- Create a Behavior Guide for each Value
- Chose great stories that make the behaviors real
- Recognize ownership behavior at Morning Huddle

OR

Create your own internal culture survey to evaluate your progress.

IMPORTANCE OF GOALS

- Clarify what you want to achieve
- Direct focus
- Individual or team oriented

Goals are dreams with deadlines.
- Diana Scharf

ACTIONABLE GOALS

- Specific
- Measurable
- Attainable
- Relevant
- Time-Bound

ACCOUNTABILITY DRIVES PROGRESS

Assign ownership and use daily huddles or weekly meetings to track progress.

CATCH PROBLEMS EARLY

BUILD A CULTURE OF OWNERSHIP

When goals are clear and people are held accountable, a culture of trust and responsibility grows.

- Celebrate Wins to Keep Morale High
- Share Lessons from Missed Goals to Keep Learning
- Make Recognition and Transparency Part of Your Culture

ACTIONS TO TAKE

Identify one metric that you will take ownership of and provide regular updates on at daily huddles.

Consider how you could get better at monitoring your goals. How often are you reviewing and discussing progress towards goals?

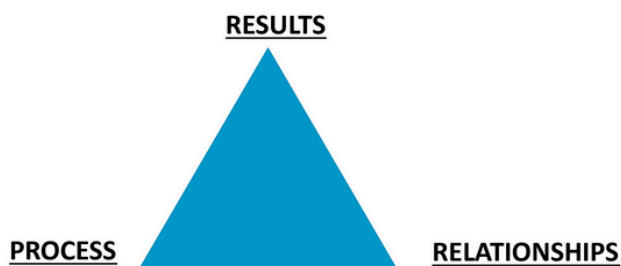
Establish a new goal for your practice related to recognition. How can you incorporate meaningful recognition into your daily, weekly, and monthly meetings?

Identify one way that you will improve cross-department collaboration.

WHAT IS LEADERSHIP?

WHO IS A LEADER?

HOW DO YOU DEFINE AND MEASURE LEADERSHIP SUCCESS?



GOOD LEADERSHIP = EFFECTIVE LEADERSHIP

COMPLEXITY CREATES CHAOS, CHAOS CREATES CONFLICT

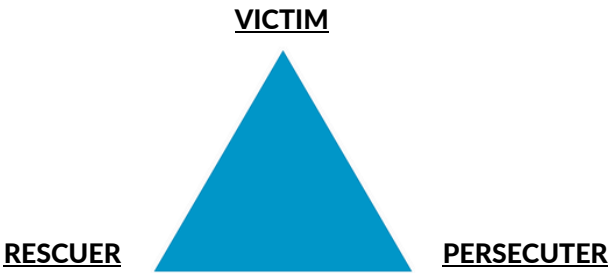
COMPLEXITY AND AVOIDANCE

Complexity/Challenge	Why am I avoiding it?

HATS, HAIRCUTS, AND TATOOS

Hats	Haircuts	Tatoos

CRUCIAL CONVERSATIONS TO AVOID THE DRAMA TRIANGLE



ACTIONS TO TAKE

- Create your “Teamwork Ground Rules” document
- Identify the top 3 areas of opportunity for each department that would help to minimize chaos and improve effectiveness
- Once you’ve identified your areas of opportunity, schedule time to facilitate a Plus Delta exercise for each area of opportunity
- Identify decisions you have been delaying and create a plan for moving forward

[illegible]

[illegible]

[illegible]

OBJECTIVE 1:

Key Result 1 _____
Team Leader Key Result 1 _____
Key Result 2 _____
Team Leader Key Result 2 _____
Key Result 3 _____
Team Leader Key Result 3 _____

OBJECTIVE 2:

Key Result 1 _____
Team Leader Key Result 1 _____
Key Result 2 _____
Team Leader Key Result 2 _____
Key Result 3 _____
Team Leader Key Result 3 _____

OBJECTIVE 3:

Key Result 1 _____
Team Leader Key Result 1 _____
Key Result 2 _____
Team Leader Key Result 2 _____
Key Result 3 _____
Team Leader Key Result 3 _____

Take a picture of your Action Plan
and send it to your coach so they
can help you reach your objectives!

DON'T MISS THESE EVENTS

Save the Date

Virtual Perio Training August 8

Q4 Retreat October 10 - 11 Charlotte, NC

High Impact Dentist November 7 - 8 Phoenix, AZ

Executive GPS November 14 - 15 Phoenix, AZ

High Impact Team January 16 - 17 Las Vegas, NV

Doctors-Only Retreat January 16 - 17 Las Vegas, NV

The Team Training Institute

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