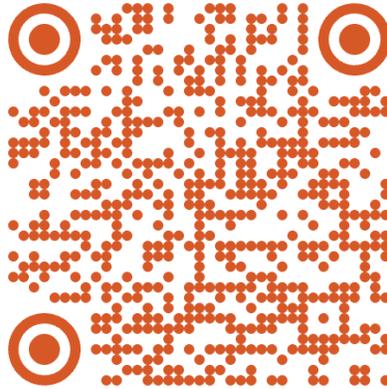




Practice Focus

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Series 9 / Session 12

The Exact Conversation Every Practice Must Have to Close and Start the Year

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1. Listen to the audio recording.
 2. Follow along with this transcript.
 3. Use the transcript to help complete your Team Activity: **key points are highlighted.**
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Hello, hello everyone. Welcome to a very special Practice Focus. As a matter of fact, it may be more focused than ever before. Today, as we end or begin your brand new year, depending on when you watch this, I wanted to provide you with a little climactic organization and thought process for the future ahead. **Today we'll also reshape the meeting structure that I have advocated for more than 20 years.** It is the most effective and most successful format of any meetings, no matter whether they're five minutes or five days. And it is very simply **number one, what's going well?** We always focus on the positive. We see where we're at. We're check in. We take an inventory of the good so that we don't forget it or lose sight of it.

Number two, hey, what could be going better? Now, depending on the interval of reflection, it would base that question. Usually we just wrap it into areas of improvement or room for improvement areas of opportunity. But the bottom line is, we flip the coin over, going well, could be better. **And then we add my very favorite part, which is what questions do you have for me?** Now, if every person in the team or every person in the department or every member of the family is saying, "Hey, what do you want to know? Now's your chance. We're busy all day long. So what do you want to ask me?" It's very important. I will tell you this. It's one of my absolute litmus tests for success in life. If I'm going to let anyone be in my circle or if I'm doing an interview of some sort for a position of any level of company, executive or dental professional, if people don't have questions, they're not worth having around because they got to be able to add something. And you can't add if you don't ask.

The fourth part is what decisions are we going to make? What will be different about the future than the past? So again, whether this is morning huddle, end of day, whether this is weekly check-in, monthly snapshot, whether this is quarterly goal-setting, or whether this is the turning of the calendar, a year in review and a year in advance. That is what the Practice Focus is right now in this moment. It's a year in review and a year in advance. So here we go.

First, you're going to run the room on the best of 2025. And everybody's going to have an answer. This is the big, broad question of what's going well, but we're going to call it, "the best of." What did we like? What do we love? What went so well? What progress do we make? What are we super proud of? What do we want to not forget? We want to remember and we want to bake this in to the year ahead.

Number two, what opportunities do we have? What improvements do we need to make? What lessons have we learned? It's a simple deal. Okay? This is not negative. This is not even critical. This is not the bad stuff. This is simply opportunities, lessons learned and room for improvement. So once you define the first and the second, you now have set yourself up for success. Everybody in the whole entire room is going to make these answers. The next part, instead of questions for me, first, doctors, you're going to do something that's so important: **you're going to recast the vision. You're going to remind people of our why, our purpose, our mission.** Why do we exist? What are we here for?

Okay? I want you to recast the vision right now. After you do this, two things. **In addition to that, I want you to update it.** A year has now passed. And maybe since you've done this, it could be a lot longer than that. So if you were to recast the vision, what updates, adjustments, what evolutions do you need to make? Now, here's the little secret: that's what we're supposed to be doing with patients, every single time we see them, we're supposed to recast the vision.

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All right. Once we've done that, team, you can ask any questions you like about this. And then finally, we're going to take all of these and we're going to ask ourselves what decisions do we need to make to make this vision possible based on these opportunities, lessons, and improvements—sticking to our core principles and our success factors—what decisions do we need to make? What targets do we need to set? What priorities do we need to commit to, to focus on, to double down, to organize, to make space for?

This is a power-packed punch of a Practice Focus. Once you do this, you're then going to finalize the plan. The way you're going to do that is you're first going to set three global practice goals. Now I like one of them to be dollars. Okay? I like one of them to be our clinical outcomes or our clinical evolution, our clinical philosophy. We're going to do more implants. We're going to do less sleep, or we're going to do more TMJ, or we're going to do all on X, or we're going to do more cosmetics. We're going to do more quadrants or bundles or whatever. What are you going to do? How are you going to build this number? What are you going to do? And then three, that's going to be kind of a bonus. It could be marketing or new patients or culturally. So I like to say one for the practice, one for the patients, and one for all of you.

The second thing you're going to do is you're going to set departmental objectives. So you have the business team, you have the clinical partners or doctor team. You have the hygiene or specialty or whatever. You may have different teams. You may have teams of teams. You may have locations. You may have doctors, whatever. You're going to set two goals for every single department. We're going to call these goals. We're going to call these priorities. Okay? What are the things the departments need to carry out in order to achieve this?

And then finally, as individuals, as leaders of yourself, okay? Me, myself, and I, you're going to do one commitment that is professional, growth and development, promise to your team. And you're going to do one that's personal. You're going to do one personal self-love, self-care promise to you. Okay? So you got three global, you got two departmental, and you got a one-on-one, a heads and tails, personal, professional. This is goals, priorities, and commitments to you. This is a beautiful thing. And once you do this, you're going to bundle them all up. You're going to send them to us, but most importantly, you're going to review all of these. Every single quarter, you're going to see how you're doing. And then you're going to rinse and repeat every quarter. Best of opportunities, lessons, improvements, recast and update division, decisions, targets, and priorities. And you're going to redo this. You will compare and contrast. Okay? You'll reflect and you'll repurpose.

Remember the four mental focuses. Rate yourself on a scale from one to 10. 10 is your absolute perfect best. You're always striving for this. One is stinky, slimy, smelly, worst, not even trying, shouldn't be here. Okay? Rate yourself on a scale from one to 10 every day. Number two, train as if it were real, because it is. Life isn't practice. So our meetings matter because they sharpen us all. They make us ready for game time because it's all real. Number three, healthy competition. When we say it, we mean it, we do it, we follow through. There's accountability. If I don't deliver on what I said, I lack integrity. I'm letting my team down and myself. Okay? So healthy competition says, "I'll beat you if you beat me. Let's try to better each other." Okay? This is iron sharpens iron and we go. And then number four, review progress and renew your goals. You have the perfect time to do that right now in this year. As we turn the calendar and we turn the page and we set our sights on the future.

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That's what we're going to do! And then for the new year, your next Practice Focus is going to be right here as we talk about how to succeed in the success system for 2026. That is the focus on the few, to turn limits into leverage. That is to revisit your core values, to make sure that you're following your disciplined daily success system. To set as a team, what are your non-negotiables with your schedule, with your dentistry, with your patient's health, with your time, with your attitudes, with your communication? And what will we have zero tolerance for? Very important. State of ideals. And then the things that get in the way of those, we remove and extricate.

And then lastly, as a team, I want you to talk about why we exist, what we do, and how we do it. **And I want you to own your differentiation. I want you to go all in on your dreams and your potentials.** And I want you to know how extremely proud of you we are, of you, how grateful we are to be in your life, and what a privilege and an honor it is to have you in ours. So hey, as I love to say, the best is yet to come. I know this because that's who we are. We always better our best. Every year we're at the pinnacle. And whatever pinnacle that is, it doesn't mean every year was a perfect year, a flawless year, because those don't exist. It doesn't even mean every year it was a record-breaking year in any one category, but in one way, shape or form, we have grown, we've evolved, we've strengthened, we've gained courage and confidence. And most of all, we're a little wiser.

Okay? And so now we say we will better our best because that's who we are. That's what we believe. And that's how we live. This team, this daytime family, you're so fortunate to have each other; stick together. And I want you to pay special attention to our Monday Morning Huddles that are coming your way in January. We have a little surprise, and we have just an amazing theme that you're going to love, that's going to set you up for success for the future, to be good to yourself for your lifetime. And I'm going to promise you the best, most fulfilling, most exciting, most fun and valuable and transformative year of your lives. And together, we commit to excellence and significance in every way, because you know what? As my famous saying on my desk says, **"I'm not telling you it's going to be easy. I'm just promising you it's going to be worth it."**

And that's because you're worth it. Your mission is worthy. We must succeed. Thank you everybody very much for a memorable and a meaningful year. Now, it's not about where we've been, or what we've done, or where we are, or what we're doing. It's all about where we're headed, who we're becoming, and why it matters. So let's go out there, let's chase it down, let's close out the year, let's launch the next one, and let's go get it.