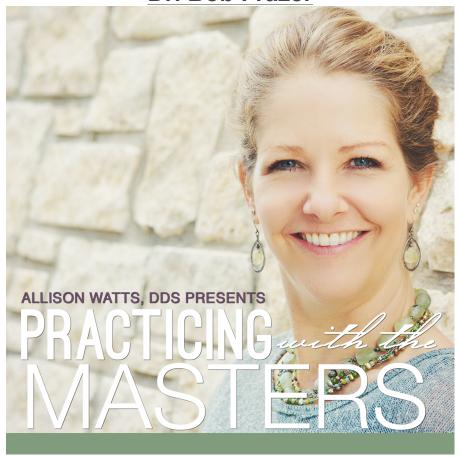
Ep #64: Creating a Future of Choice, Not Chance with Dr. Bob Frazer



Full Episode Transcript

With Your Host

Allison Watts, DDS

Welcome to *Practicing with the Masters* for dentists with your host, Dr. Allison Watts. Allison believes that there are four pillars for a successful, fulfilling dental practice: clear leadership, sound business principles, well-developed communication skills, and clinical excellence. Allison enjoys helping dentists and teams excel in all of these areas. Each episode she brings you an inspiring conversation with another leading expert. If you desire to learn and grow and in the process take your practice to the next level, then this is the show for you. Now, here's your host, Dr. Allison Watts.

Dr. Allison W.:

Dr. Bob Frazer is an innovative thought leader in the world of dentistry. He has been a sought-after speaker and consultant for dentists and their organizations for 30 years. He has presented over 1,000 presentations and workshops across North America and Europe and is a member of the National Speakers Association.

In addition to being a popular presenter, he and his firm offer dentists a range of transformational services, including Applied Strategic Planning, performance coaching, growing emotional intelligence, elevating the new patient experience, hiring high and growing achievers, wilderness leadership adventures, and the national study club, which is his inner circle.

He helps dentists realize lives of balance, fulfillment, and significance, while he shows them how to make comprehensive and restorative dental practices, not only health-centered and highest quality, truly remarkable, and also profitable. He removes barriers to people's potential, providing proven models, principles, and processes, from which they can design and build a preferred future.

Dr. Frazer led a successful private group dental practice for over 30 years. He founded his consulting firm, R.L.

Frazer & Associates in 1991 in response to mounting interest in his coaching and consulting services.

Recognized as the foremost authority in Applied Strategic Planning and strategic management in dentistry today, he's led numerous top-chair dentists and their team, plus dental schools, associations, societies, including The Dawson Academy, through the applied strategic process, the planning process.

A masterful storyteller, he shares with humor and poignancy how to harness the powers of vision, leadership, and emotional intelligence in one's life and practice.

Dr. Frazer is a fellow of the American College of Dentists and the International College of Dentists, and he has published over 50 articles in dental journals such as Dental Economics. He's also the president now of the AES, Leaders in Occlusion, MPD, and Comprehensive Oral Care.

Is that the correct name now, Bob?

Dr. Bob Frazer:

It's AES, Occlusion, TMD, Comprehensive Oral Care. We realize that after 64 years, and many people look at that, and the old name was the American Equilibration Society. And as everybody on the phone knows who's a dentist, equilibration is a procedure, and that was kind of one of those folk laws they made, and some people will look at our meeting and say, "Oh, that's all about equilibration." Well, it has never really been all about equilibration since the early days. It's really been about occlusion, which we think is the foundation of longevity in dentistry, and then in addition to that, TMD, myofascial pain, and then what we realized in our most recent Applied Strategic Plan that I

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led the group through, we really are about comprehensive oral care. How do we put it all together?

And this year's program, which is really excited about, on February 21st through 23rd, 23rd is actually an elective day, but it is the integration of total health in a comprehensive practice of dental medicine. And I think it's going to be a paradigm shifter for the entire profession. We've got a great attendance coming so far, and there's still room if any of you on the phone would like to come. Just go to www.tmj-aes.org, and take a look, and you'll see we've got Robert Lustig starting off. Rob Lustig wrote the book Fat Chance, which was made into a movie. He's going to talk about the proinflammatory Western diet and how it's practically killing us. And then we've got David Wong on salivary diagnosis. He believes that we'll be doing probably 12 different salivary tests for metabolic disease in the next four years, and we've got Michael Glick there, from the ADA, to keep us honest in an ADA journal and make sure that we're talking science, and emerging science, and not smoke and mirrors. And it's just an extraordinary meeting. I could go on and on with who's speaking there.

So love to have you come. If you do come and you decide to sign up, if you'll put me down as your referred-by, I'll make you a presidential VIP, and that gives you some extra privileges. So quick plug for AES while we're on the phone.

Dr. Allison W.: Wow.

Dr. Bob Frazer: Yeah. Yeah.

Dr. Allison W.: Nice. Well, I know you're very passionate about that

meeting, and I know it's extraordinary, and that's a high-

level group of dentists.

Dr. Bob Frazer: It is very high level. Some of the best dentists I know in

the world is... 34 countries are represented in the AES, so in any case, you tell me when we should jump into the

subject hand.

Dr. Allison W.: I think now's a perfect time. That was perfect. That's what

I was thinking. I was just going to start off by asking you

how you got started in ASP.

Dr. Bob Frazer: Yeah, that's an interesting story in itself. So I thought

tonight, we would call this Creating a Future of Choice, not Chance. And I think I was back in the Air Force in 1970, out of dental school, and one of the things that happened in 1970 that, unless you're as old as I am, may not remember, is that the courts ruled that a individual professional could incorporate their practice. But nobody

knew how to do that.

So I'm in a periodontal study club and was stationed at McChord Air Force Base in Tacoma, Washington, and I'm in one of the meetings one night, and they say, "Hey, there's a guy teaching over here in the community colleges how we docs can incorporate our practice when we go on out of the Air Force and want to incorporate." So I decided I should sign up for that.

And he was a Air Force Reserve general, MDA, and I remember going to the very first session. There were physicians and dentists there, and he said that, "Well, all you docs are here because you're going to be here to save money on taxes by creating a separate business entity, a corporation, and this is the first time you've been

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able to do that." And he said, "But you ought to be here to learn Applied Strategic Planning." And I'd never heard of that, and he said, "Well, you know, if you're going to wear your hat as a business owner, you need to have a strategic plan, and you need to understand what that is."

And he said, "In a strategic plan, one of the things you have to do is identify the enemy." And he went to the board, and he wrote down the U.S. Treasury and IRS. And we all kind of laughed at that.

One of the assignments he gave us in teaching us how to incorporate and teaching us all the things about the process of Applied Strategic Planning, although he didn't do it as much in depth as I would later, went off and took some training with the university associates out of San Diego, he helped us understand that we were going to, in this 12-week course, we were going to write a prospectus for our practice, not unlike a mutual fund prospectus, and we were going to describe that practice five years from today if it were the best it could be.

We were going to do a little lesser description of the practice, a little less complete, 10 years from today if it were the best it could be. Then we were going to create a application for a line of credit, meaning the X number of dollars we could borrow, and we were going to set up a repayment plan that was zero interest the first year, and 5% the second year, principal, and we were going to tie it to a fixed interest rate, and it was going to be a seven-year payout. Well, banks don't normally do that.

I thought, when I'm taking the course, that that's why I'm taking this course, so I'll have this great package to take to the banks. And I did come back to Austin, and I

remember, I went to 11 banks with all of my writeup, et cetera, and they were all kind of shocked when a dentist came in, and I met them, and I shook their hand, and I handed them my prospectus and said, "Why don't you read through this, and I'll get back in touch with you in about a week." And I did that, went to 11 banks.

Well, there were only five that were really willing to even discuss a fixed line of interest, and of those five, there were two that got very, very serious, and I ended up dealing with one, and I literally was borrowing money, about six years into that plan, at below prime rate.

But that wasn't what Howard Church, was the name of this fellow who taught this course ... Don't know if there's anybody out there who might have been in the Pacific Northwest. He taught a lot of dentists at that time. I really thought that's what it was about, but what it was really about was creating that vision.

You know, in the first century BC, the Roman philosopher Seneca said, "Our plans miscarry because they have no aim, and when a man ..." and I would add a woman, "... Does not know for what port they're making, then no wind is the right is the right wind."

And by having a vision for what it is you want, it doesn't control the future. That's impossible. What it does do is it puts you in creative cooperation with the future. If we were to define Applied Strategic Planning, I want you to think for a moment that in all planning, there are three states of time. There is the past, there is the present, and there is the future.

In traditional strategic planning ... By the way, I have book on my bookshelf that's about 850 pages on why strategic

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planning doesn't work, and by and large it doesn't, Applied Strategic Planning works very, very well, because it's action-oriented from the beginning.

But in Applied Strategic Planning, the definition is, really, it's a process by which the guiding members of any organization, be that a family, which is where we always start with your personal life, or a practice, or an association, or a society, or a study club, I've been privileged to work with seven different dental schools, and I've lost count of how many dental societies, from as large as the California Dental Association to as small as the Colorado or Missouri Dental Associations, the guiding members envision the future of the organization if it were the best it could be. And what that does is it creates not only a direction, but it creates an energy to move in that direction.

Because it's not about being ordinary. It's about being the best you can be. And it evolves from that into elements of missions and core values and internal analysis, and external analysis, into a strategic business model, which then translates into goals and objectives, lines of business for your practice, if we're talking about that, and then into something that is highly proprietary with me, called Integrated Action Plan, which is a series of steps to carry out your short-term objectives. More importantly, it involves, first of all, you and your spouse, and then secondly, it involves your team, so that they have a chance to have ownership in the direction that you're going.

And in today's world, when I hung up my shingle in 1972, yes it was a huge advantage that I had an Applied Strategic Plan, but frankly, we were sick of saying this as

dentists. There was no Castle Dental. There was no Monarch Dental. There was no Managed Care Heartland, et cetera. We just had our shingle, and you know, if you were a reasonably emotionally intelligent person, you had reasonable skills, people came to you and you didn't hurt them, and by and large, your dentistry held up, and it looked okay, you were successful.

That's not true today. You cannot practice that way, unless you're in a very small rural community, because the world has changed, and I teach about and speak and facilitate about 20% of my time outside of dentistry. My largest client right now is about a \$600 million food conglomerate out of San Antonio. I like working with those corporate entities, because they approach this with a great degree of seriousness, and they do it with intention.

And really, what Applied Strategic Planning is about is creating that vision and then living your life intentionally, not in order to control the future, but to get in creative cooperation with it, so that when windows of opportunity open, as they have for everybody on this phone call, you will know that I want to move through that window of opportunity. Or I don't want to move through that window of opportunity.

I recall in my early days, I have been fairly articulate most of my life, and I got a lovely lunch one day with one of the main movers in dentistry and Austin, and he said, "Bob, we want you to be the DENPAC chairman for Travis County and our district dental society, and if you do that, this will assure that within probably eight to 10 years, you'll be president of the TDA."

And I thanked him profusely for that, and I've been in practice all of three years, or two years at the time, something like that, and I said, "Bob, let me go think about that." And I went and thought about it. It was inconsistent with my vision. My vision was to create an extraordinary dental practice, where we move people to a level of health through dentistry that they wouldn't have known without what we did, in a collaborative way, using the work of Bob Barkley, and L.D. Pankey, and Harold Worth, and those kind of people.

And Ken Olsen, and some names may ring to you, and you may not know. He was a psychologist that influenced me. And doing the very best possible, but doing it in a collaborative manner.

And I also wanted to teach, and what I've always wanted in my life, whether it was my teammate, or my client, I want to release your God-given potential. I really believe that our potential is what God gives us, and I believe that what we do with that potential is our gift back to God. And so that's the purpose of our firm. It's the purpose of everything we do, whether we're working with Sterling Foods in San Antonio, or LMH Packing, or any of those companies, or Boston University College of Dentistry, or Loma Linda, or the California Dental Association, or the Allison Watts practice.

I'm curious if anybody on the phone call, besides Allison, has been through one of our Applied Strategic Planning processes.

Dr. Allison W.: I know at least one person has. If you guys have ... Do you want them to raise their hands?

Dr. Bob Frazer: Well, yeah. Or even just say, "Well, this is ..." by name,

and then we'll let ... I have a couple questions for you.

Dr. Allison W.: Okay.

Tracy Warner: This is Tracy Warner.

Dr. Bob Frazer: Okay. Say it again, because that was a little broken when

you said it.

Tracy Warner: Tracy Warner.

Dr. Bob Frazer: Tracy, all right.

Tracy Warner: Yeah. Hi.

Dr. Bob Frazer: Hi, there. How's everything in Michigan?

Tracy Warner: Awesome.

Dr. Bob Frazer: Awesome. So you went through as a-

Dr. Bob Frazer: You went through as a team member, right Tracy?

Tracy Warner: Yes.

Dr. Bob Frazer: So for the sake of the others on the phone, what

happened as a result of that? What did that do for you?

Tracy Warner: The Applied Strategic Planning I've been through a

couple of times, both as team member, and honestly, for me, it was transformational in how I moved forward, not only in the practice that I was in, but in my personal life. And I still apply it now. I have integrated action plans all

over the place.

Dr. Bob Frazer: Wonderful. Wonderful. Well, thank you for that.

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Tracy Warner: Yeah.

Dr. Bob Frazer: And I know that ... I believe Amanda Kotter sent me an

email that she might be on the phone tonight.

Amanda Kotter: I am on the phone, Bob. How are you?

Dr. Bob Frazer: Are you on?

Amanda Kotter: I am on. How are you?

Dr. Bob Frazer: Well, I am good, and for those of you who don't Amanda,

Amanda is a wonderful pediatric dentist from the heart of Texas. And so Amanda, would you reflect a little bit on

your Applied Strategic Plan?

Amanda Kotter: Sure. My husband, Brad, and I, we've did the Applied

Strategic Planning process with you in 2010, 2011, and we knew we were getting ready to go through a transition, because our children were getting ready to graduate from high school and leave the home, and we knew we wanted to do something differently. We just didn't know what that looked like, exactly, and so for us, it was really a soul-

searching process.

And we each arrived at a vision completely separately and discovered through delivering our visions to each other that we both wanted to live on a ranch, something

that we'd never said out loud before.

And so then we went about using the integrated action plan to ahead and make that a reality, and today, I'm actually talking to you from our finished house on the

ranch.

Dr. Bob Frazer: Wonderful.

Amanda Kotter: So I'm going to have to echo the other caller and say ...

Dr. Bob Frazer: Tracy, yeah.

Amanda Kotter: Brad and I were talking this evening, and really spending

time and creating a mission statement has really allowed

us to have a measuring tool, and so that, as you

mentioned before, when that opportunity arises, it's really

clear if that's the direction you should take, or if that's

really counter to where you really want to be.

Dr. Bob Frazer: Yeah. Yeah.

Amanda Kotter: So we found it very powerful and very focusing, and for

us, it was really a fun project for us to do together and then carry back to the team. And the mission statement

that we have painted on our wall in the office is ...

Dr. Bob Frazer: Wow.

Amanda Kotter: ... Something that we all arrived at together, as a team,

and so that's really great for everyone to see. And we really focus the practice in that direction, and we feel like we're living up to our mission statement, which is pretty

powerful.

Amanda Kotter: To go from not knowing what your direction is to knowing

that you're headed there.

Dr. Bob Frazer: Yeah. Thank you so much, Amanda, for doing, and tell

Brad hi for me. Brad's a wonderful radiologist, and so, you

know, I really don't know why everybody's...

Male: Hi, Bob.

Dr. Bob Frazer: Go ahead, somebody else want to say something?

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Male: Hi, Bob.

Dr. Allison W.: Who is that? Who wants to say something?

Female: So, anyway, [inaudible 00:18:30].

Dr. Bob Frazer: Okay, I know if you're on speakerphone, it's probably

going to echo.

Female: [inaudible 00:18:33].

Dr. Allison W.: Okay, I'm going to put everybody back on lecture mode.

Dr. Bob Frazer: Yeah, I don't ... I just-

Dr. Bob Frazer: That's fine. I can't hear you. That's one of the problems

with phones sometimes is that we have that some on occasion, when I'm doing my stuff, so I'm going to assume that everybody's on the phone tonight is on the phone, because there's something inside of you that says, "Do I need to take a different view toward my future, and how many more years have I got on the planet?" And you know, there's always an answer to that. If I ask you how much longer you're going to be here, nobody knows for sure what that is, but you do know it'll be the rest of your

life, whatever that is.

And I do believe that if you look at studies for psychology and elsewhere, and you study human beings, when they finally leave this life, most of us have only accomplished what percentage of the potential that we had within us.

Now by the way, what's interesting about that, particularly in this big tumult about immigration right now, I don't know if you knew it or not, but immigrants to this country achieve more of their potential than native-born Americans, that in fact, if you are an immigrant to this

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country, you're six times more likely to become a millionaire than you are if you're native born. Why is that?

Well, it's the power of vision. They come here because they believe it's the land of opportunity. It's a land where they can release their capacity, their talent. They'll have freedom to express themselves. My coach is a fellow by the name of Nido Qubein, which some of you may know. He's president of High Point University, and actually, we're not ... We haven't been coaching for the last two years or so, because he's been too busy being president.

But Nido immigrated here from Lebanon, and he could speak about 12 words of English and had \$50, and he's now a member of the Horatio Alger Award, Society for Distinguished Americans. He's a multimillionaire. He has a foundation that contributes hundreds of thousands of dollars to children to get them in their college education, et cetera, and he's done some amazing things from High Point University.

What I'm saying to you is that I assume everybody's on this phone call because there's something inside of you that says, "Have I really ..." You know, Kierkegaard, the Danish philosopher said, "We arrive on earth with sealed orders." And I thought, for many years, that he said the second part. One of my clients did some research and said, "No, Bob. He didn't say the second part. You said the second part. And what I said in that second part that was that, "We arrive on earth with sealed orders ..." thank you, Kierkegaard, "... And it's not until we're generally 40 to 50 years of age that we actually have permission to open the orders."

In other words, why are we here? What's our highest calling? What is it that we can take and do something with that can leave a legacy? You know, Kipling said that the lives of great men and women remind us that we too can live the life sublime and leave footprints on the sands of time. And that's what I hope to do. I want to do it through my children, my grandchildren, through my profession, and through those in my church, and other people that I get to touch, and I know they've left footprints on me, and they've made my way great.

So let me talk about this thing called Applied Strategic Planning a little bit more. Let me take you back to that part where I was saying to you that there are three states of time, past, present, and future. Imagine that I'm standing before you, and I'm on a lighted lecture stage, and I'm on the far left side of the stage, and behind me is that word past, and then in the middle there's that word present, and then on the far right, there's that word future.

And I have with me, in my left hand, I've kind of got ahold of a chair, and I'm dragging it backwards from my past, whether that be the past of my dental practice last year, or the past of my life, and I'm thinking about, "Well, last year, in our dental practice, we grew 3%, and we added that whatever device, and that added some... and then we added another service." And so I'm taking that, I'm marching into the present, and I'm dragging that chair with me.

And I'm saying, "Well, and now we're here, and I see where we are." And those are all important. It's important to recognize the past. It's important to know where you are in the present. And then I'm going to go off, and I'm

going to create the future, and I'm still dragging that chair. That's not wrong.

What do you notice about that picture that I'm painting for you? It is that I'm dragging along not only what we've done in the past, but I'm also dragging along my limitations.

Maybe it's old Gertrude on the front desk, and Gertrude's been there 20 years, but she hasn't really got 20 years experience. She's got one year 20 times. Or maybe I'm in a part of the town that doesn't quite fit, like one of my coaching clients who wanted a very health-centered practice, and began to look at where she was, and realized that another part of town had jogging trails, and Whole Foods was located over there, and she probably needed to find a lot over there and move to a more specific spot. Who moved from Kentucky to Coral Gables, why did he do that? He did that because he said, "I'm not going keep taking out teeth. It's just not okay for me."

And so sometimes, you have to move. You know, Covey, one of the books we use in our Applied Strategic Planning process, is Covey's 7 Habits of Highly Effective People, or Highly Successful People, we always ask you to read it or reread it, and one of those first three habits, and it's all about the private victory, he says we're proactive, that we have a personal vision, and we act on that vision.

And by the way, if it's not written down, you don't have it. That's my belief. And then secondly, you begin with the end in mind. Where do I want to go? Where do I want to achieve? And then lastly, you put first things first.

So I'm going to go back to that stage, and in Applied Strategic Planning, we take that chair, and we leave it in

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the past. We recognize what's valuable in the past, we recognize what we learned and what we, perhaps where we achieved, where we fell short, and what we can take with us, and we go to the present. We want to know where we are now. That's important. But then we put that aside, and we go to the future, and we say, with a green field attitude, "If it were the best it could be ..." And when we do this work with you, it always start with you and your partner, your spouse, your SO. We don't have the team involved then, because we don't live our lives to work. We work to live our lives.

And I recall a few, many years back, actually, when the boys were both in school, and I'm in high school and junior high school, and I'm coaching junior basketball, and I'm leading scouts, and I'm lecturing, and I'm running a practice, and I'm having breakfast one morning with John Bradshaw. John Bradshaw was very instrumental in my life. Those of you that know John know that he did a lot around the inner child and then helping us to heal that childhood that many of us had that was good in some ways and not so good in others.

And as I'm reciting all the things I'm doing, John says to me, "Wow, Bob. You are certainly an amazing human doing." And we went on for a little longer, and I said, "Wait a minute, John. Did you just say I was a human doing?" And he said, "Well, you're sure doing a lot of stuff." He said, "When do you stop and be? When do you stop that recess to reassess? When do you just stop?" And if you're going to do Applied Strategic Planning, that's exactly what we do. And Amanda knows this, with she and Brad, and they were with, I think, two or three other couples, and we were in a cloistered environment with no televisions, and we used guided imagery, and we have

them go out and imagine their future, independent of each other. And then we have them do something quite powerful, and it's write a letter from the future to a good friend, describing your life if it were the best it could be.

And yes, your life includes your relationship with your children, your relationship with your spouse or your partner, and then it also includes your work and what you're doing there. And typically, you know, the guided imagery takes, maybe, 45 minutes or so, and then people go off and write for an hour and a half, two hours.

And it's like they drew a circle. Like, when Amanda was speaking a moment ago, she drew a circle, and that circle represented her vision. Brad, her husband, drew another circle, and then they got to share those. And what's interesting about that sharing, rarely is the vision shared without tears. I don't remember, Allison, whether you and Daniel had any tears when you went through this, but when there are tears, what I know ... My friend, Emmett Miller, one of my teachers, a psychiatrist from California and a concert pianist, amazing guy, he said, "You know, when there are tears, it's because the heart's overflowing, and the juices are running out through the eyes."

So that beginning with where you want to be as a couple is so critical, and you know that in all the professions, be it dentistry or medicine, our divorce rates are very high. Our dysfunctional rates are very high too, and why is that? I think it's because people are living, they're living a mythology. They're not living a genuine autobiography.

I have three coaching clients who literally decided that ... And two of them, actually, all three of them were very successful in dental practice, and they all left dental

practice at a fairly young age. One of them is now an attorney in California. Another is an equine therapist and loving every moment of what she does.

And the point being that, again, sometimes we end up in a place that wasn't really where we might best fit in our life. Or maybe, as with Norman Cousins, if you ever read the book Human Options, Norman Cousins was a amazing fellow. He was with the Atlantic Monthly, and I think he was a reporter for a while, and then he became the editor. He set his life up in 10-year increments, and every 10 years, he changed his career. I'm not advocating you do that, but the point being, you need to reexamine and see where you want to be. And so that's what we do.

So in that Applied Strategic Planning process, we envision the future, and we write it out in present tense terms. And it helps to have facilitation. And the first person you share it with is not your partner. You share it with one of us. I do this with Irena Oldfather I do it with Bill Woodburn, a skilled counselor that I teach emotional intelligence with, and when you share that with us, we have no vested interest if you suddenly say, "I want to sell my dental practice and go be an equine therapist or, you know, go tour the world, or whatever." I mean, we don't. Your spouse might. So we want to give you the sort of dry run to start with.

Once you've done that, and again, remember what I said. It's not about controlling the future. You can't really control the future. It's about getting in creative cooperation with the future. Then we do some very deep and profound values clarification. Now values, you know, in Covey's book, he talks about principles by which we live our life. That's what a value is, and we're kind of like a sphere,

and on the outer perimeter of our sphere, there are attitudes, and then inside that, there are opinions, and inside that, there are beliefs, and inside that, there are values.

And then inside the very core, that core of our being, there's something called core values. And core values are principles by which we live our life that are non-negotiable, meaning if they become a competitive disadvantage, we will not abandon them.

The food company I work with San Antonio, you talk about a values-driven group, I went there, and they told me how important honoring their employees was. This is a third-generation family-owned company, and in our process of Applied Strategic Planning, they had three major companies. The company that their great grandfather established was a packing house, slaughtered cows, mostly for hamburger, and it had been around for three generations and had over 360 employees, slaughtered some 940 cows a day.

And when we did the Applied Strategic Plan, it was in the height of the drought in Texas, and there were no cows. There was a real cow crisis, and we did everything we could, but they decided that the best thing to do with that company was to close it down.

And so sometimes, the strategic planning will do that, and we closed the company. They closed it a year early, gave everybody one year's severance pay, that's a lot of money with 360 people, and then they went further, and they saw to it that, of the 360, 335 got new jobs. They had job fairs they sponsored.

What they showed us was their core values were respect, one of them was respect for the individual. They lived it. You know, you measure a core value by, number one, it's really chosen aware of the consequence of the choice. Number two, it's acted upon. You say, "Well, I really value exercise," but you don't ever exercise. Well, I don't think you value exercise. You say, "I value family time." I look at your calendar, and there's no family time, so you don't.

So number one, you've got to freely choose it, knowing the consequences. Number two, you've got to act on it. And number three, with a core value, it's prized. I mean, you tell people it's important to you.

One of my core values is family. I spend a lot of time in Durango, Colorado, because my two sons are here. More importantly, my five grandchildren are there, and it's one of my callings, is to try to leave maybe a little bit of an ethical will with those grandchildren and maybe be there as that wise elder that has a chance to talk to them and just share a few things I've learned. And as they grow up, my oldest is 13, my youngest is only three and a half. Two boys, and three girls. Never had a daughter. Always wanted a daughter. Boy, granddaughters are better than even having a daughter, I think. Some of you have daughters may disagree with that.

Once we understand ... There's a flow sheet of Applied Strategic Planning, I'd be glad to share it with you. Anything I'm talking about tonight, I will give to you if you'd like to have it, so don't hesitate to reach out to me after the conference, and by email or by phone, I'll give you some contacts.

Once we understand what our vision is, we need to know what our values are. Values don't give us direction. They give us the rightness of our direction. The Mafia has values, but they're not the values that we would have, and how many values are typical within core values? Probably three to five? Maybe in a company, there might be as many as seven.

Remember, guys, when you choose a core value, you can never violate that core value, or it's not a core value. You can have other values that change over time, but core values don't change, even when they're a competitive disadvantage. And so you use your core values to keep the rightness of your direction. And then you create a mission.

And you heard Amanda say that we had a mission statement, and a mission is ... You know, core values come from the heart, and so does vision. Vision's kind of ethereal. It's always about greatness, not for greatness's sake, but for the release of your potential. It is greatness in terms of what you're able to achieve. It's always, by the way, about service, service to others. Numbers are always the last thing in a vision. They're the outcome of a vision achieved. Then we migrate from that, and that mission statement says, "What is it we intend to become? Who are we here to serve? And lastly, how do we intend to serve them?"

I've got a mission statement that, basically, I might just give you an example of a personal mission statement, because we do want you to write a personal mission statement when you do this work and then let it be your guide. And try to write one that is short enough that you can remember it. Now I'm going to paraphrase mine, a

caring, loving husband, father and grandfather who cherishes in the firms my wife, my children, my grandchildren, who provides for them safe, and nurturing, and stimulating home and family experience that builds their positive self-esteem and release their talent and capacity for life. In my mission, I want to strive for a life of principles that involve charity, and honesty, and patience, and humility, and fidelity, and optimism, and industry, and moderation. I need that one big time, and integrity. I want to have a balance of love, play, work, and worship.

And you can steal. You know, that came right out of L.D. Pankey and Dr. Cabot. And then I want to be a gifted teacher, in the sense of The Prophet. I want to walk beside my clients, beside my team, and give first of my lovingness, and then of my wisdom.

That beautiful piece from The Prophet, where he talks about, "What is it to be a teacher?" And he said, "The teacher who is indeed wise does not bid you to enter the house of his wisdom, but leads you to the threshold of your own mind, and if he walks in the shadow of the temple among his followers, he gives first of his lovingness."

So in my mission, I have that. And then, to assemble the best team of people working, initially in dentistry, and now in consulting and coaching, and to help them release their potential as we walk beside our clients and let them release their potential. And then lastly, to do everything with integrity and excellence, and to dedicate all my good work to God and grateful thanksgiving, without whom I'd have nothing.

Now, is that who I am? No. If it was who I am, if I could check it all off, I'd need a new mission. It's who I aspire to be. Why am I able to quote it like that without reading it? Well, every time I get troubled, and just like you, on this telephone call, I get troubled from time to time, I go back and I read that mission. And it's usually I'm troubled with maybe Angela, my great right hand, because she's just doing things differently than I'd do them, or maybe it's a couple of team members, or maybe it's my wife, Linda. We just celebrated our 50th wedding anniversary. The good news is they say the first 50 years are the hardest, so I guess it's downhill from here.

Dr. Allison W.: Congratulations.

Dr. Bob Frazer:

Right. Thank you. But the point being, when I read that, you know what, every time it strikes me? And I have it written down, and I pull it out, and I read it. Guess who's not living their mission when I'm so troubled by Linda's actions, and I'm troubled by Angela's actions? Moi, 90% of the time. Yeah.

Let me shut up for a minute, because I've said too much without hearing from the group, and are there any questions up to now about this process of Applied Strategic Planning? By the way, it comes from the original first application of this, when I took my training in San Diego, was the Apollo program, where they created this vision, thanks to John Kennedy, of putting a man on the moon by the end of the decade, which you need to understand that in 1961, when that was proposed, those of you that don't know about it or maybe read about it in your history books, it was totally impossible. The computers were vacuum tubes. You had a building the size of the Empire State Building. You had a cooling unit

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the size of the U.N. You had punch cards. There was no way we could guide it to the moon. And then in addition to that, if we got out there, how were we going to get back? And we didn't have a rocket that could lift the payload.

But what was so interesting, when those scientists that we pulled together in the first NASA meeting, they say that the second or third question ever asked was this question, and think about the simplicity and the power of this question. And it was, and they were all men in the room at the time, "Gentlemen, what do you suppose a man's footprint will look like on the surface of the moon?"

Now, that's not where I would have started, but that's where they started, and they said, "Well, can we build a boot that would function in zero gravity or low gravity? Can we build a spacesuit? Can we build a landing vehicle that would land in low gravitation forces?" So with AFP, we build from the future back toward the present. The difference is enormously powerful, because when you have a vision of what you intend to become, it changes present reality. That's the difference in this process versus traditional planning.

Let me now shut up and take any questions from the group, or any comments. Do you want to put us off the lecture mode for a moment?

Dr. Allison W.: I can do that. Let's try it and see if the...

Dr. Bob Frazer: Or do you have any questions, Allison? Maybe you.

Dr. Bob Frazer: Now like we've got a mass of revolution going on out

there.

Dr. Allison W.: I'll tell you what. Let's have ... If you have a question or

comment, push star two, and I'll see your hand go up, and

then we'll know, and I can just unmute that one line

instead of having all the noise.

Dr. Bob Frazer: That sounds good.

Dr. Allison W.: Yeah. Anybody have any questions?

Dr. Bob Frazer: Maybe they've all left us. It's just you and me.

Dr. Allison W.: No, they're here.

Dr. Bob Frazer: Okay, good. Glad to hear that.

Dr. Allison W.: I still see them. They're here. Okay, so no.

Dr. Bob Frazer: No questions. I'd be curious if what I've said so far is

making sense to the group. Are you tracking with me?

From vision to core values.

Dr. Bob Frazer: From core values to mission. And I understand we're

going for about an hour. Is that right?

Dr. Allison W.: Right. So we have about 15 minutes left.

Dr. Bob Frazer: Okay, so let me fast forward a little bit. Once we get to

this part, now we're beginning to migrate into what's

called a strategic business model. When it comes to your personal life, we kind of keep that a little softer than what we do in your actual practice. We just did a wonderful practice in Wimberley, Retreat Three, and they presented

their strategic plan, and each department, they had an overall vision for their practice. They had departmental

visions as well.

If the front office were the very best it could be, what would it be doing three years from today, five years from today? What about the hygiene department? What about the clinical team, et cetera?

Now so as we've migrated to this part, one of the things we do is we do what's called an internal analysis, so we know what our mission is, we know where we're headed, and we do something called SWAT. What's a SWAT? What are the strengths, the weaknesses, the opportunities, and the threats? Strengths are internal, weaknesses are generally internal, and the great strategist knows that you play to your strength to overwhelm your weakness. You need to recognize your weakness, but you use your strength to overwhelm that weakness.

Think of you're putting together an athletic team, and you've got some ... And let's say it's the women's athletic team, and you've got some gals who are, you know, 6'1", 6'2", pretty tall. And then you've got some ones that are 4'8", 4'10". Well, if we're putting together a gymnastics team, we're probably not going to choose the 5'11" and 6'2" gals to be on that team. We're going to choose the little guys.

On the other hand, if we're choosing for our basketball team, we're going to choose the other, because it's a physical trait that gives them a strength to play that sport. What are your strengths? In our corporate work, we do something called an analysis of core competencies. That's a little more than we have time for this evening. But again, you look at your strengths, you understand which are your greatest strengths. You use those to overwhelm your weaknesses.

Then you look at your opportunities. Opportunities are like windows, and the great strategist always treats that as a closing window of opportunity. It may be opening, but you have to assume that it may be closing.

Now once we have that, we look at our threats. Threats are usually external things like health. Once we've got that, we try to play to our strengths, we try to seize our opportunities, manage our threats, and overwhelm our weaknesses. Now we take a look at our external environment and look at what are the waves that are moving across wherever our practice might be?

Example, back in the late 1970s, early 1980s, there was a company in Austin that was just starting out, and it was very collaborative with his customers, and when you went into that food store, called Whole Foods market down on Lamar, you got to see how the cheeses were made, how the cows were all raised, and organic conditions, and they were, you know, smiling as they were up in the Sangre de Cristos of Colorado, drinking this crystal clear water, and they collaborated with their customers.

And we said, you know, those people that go to Whole Foods are the people that would value our practice. That's a way of moving. Can we get into Whole Foods. Can we get in their path, et cetera. Today, with social media as it is, it's really easy to become part of a tribe. If the group hasn't read ... My national study club reads books, and when I build curriculums around them, and the books that we've really enjoyed in the last two years are the books by Seth Godin, and Godin is probably the most brilliant strategist in marketing in the Western world.

And he talks about a book that I'd have you read if you haven't read it called a purple cow. And he says, "In today's world, you don't want to be in the bell curve. You want to be a purple cow." They're driving through France, they're looking at this beautiful pastoral picture, they see all these cows, and after a while, it gets kind of boring. All you're seeing is cows.

But then suddenly, they see a purple cow. Well, what are they going to do? They're going to pull over, they're going to take pictures, they're going to tell their friends about it. What he's really saying is in today's world, you have to be remarkable, and when you're remarkable, you're generally tying in to another group of people who value what you value.

You know, in today's world, it's ... And most of you probably don't believe this. You can be so much more successful in a fee-for-service practice non-par, and I've got countless clients that I can show if you don't believe this. If you have an Applied Strategic Planning, if you've chosen well, and if you've created a purple cow practice.

And it's much easier to create one today when there's very distinct differences between practices. I mean, going to Heartland, nothing wrong with Heartland, or Castle Dental, is very different than going to one of Don Taylor's practice in Buda, or to Hannah Bush's practice, which is my old practice, or to Dan Matthews' practice, which is also part of my old practice, because you're treated different. The whole experience is different.

And so what waves are moving through your part of the world right now that you want to climb onboard with? Like those servers in California that are sitting off the coast,

waiting on those waves. They don't ride every wave. They choose the wave they're going to ride. And then you migrate down into goals and objectives. We do separate. A goal is a broad statement of a desired future state, and so they're taken right out of the vision statement.

When you do a really good vision, it's loaded with goals. It's usually also loaded with objectives. Objectives are under each goal, there's a concrete statement of a desired future state that leads to the attainment of a goal. And one of the things we teach is that you're going to have a lot of ... You may only have three to five goals. You're probably going to have multiple objectives. Every objective can't be most important, and what we try to do is get you to choose two, three, maybe four short-term objectives that you're going to act on.

The other objectives are there, but until we get the short-term objectives accomplished, we don't move to the others. The best way to be a great procrastinator is to start so many things you can't finish any of them.

So in our process, we help you, like a giant funnel, starting broad with a vision, narrowing it down to the point that you're going to have objectives that you act on. And then you're going to have, among your team, people that are called goal champions. These are people that, like, if there's a goal around hygiene, and you've got a steward, one of the things we do in our Applied Strategic Planning processes, we have a call to stewardship.

Stewardship is ... You know, in the old days, when the king would leave the kingdom, he had knights, and he would go to one of those knights, and that knight was going to be the steward of the realm. They were going to

look after the kingdom while the king was gone. And so you want stewards. Those are people, Peter Bloch's book on stewardship, and it's subtitled putting service over self-interest. The steward is someone who acts as though they own part of that organization. You all have them on this phone call. And they talk about we, not us. And they don't do it out of a desire to comply or a desire to control. They do it out of a true, deep belief and commitment in what this practice is trying to accomplish and do. Tracy is one of those. She is an extraordinary steward.

And for all those that spoke up earlier, and then you migrate into what we call the Integrate Action Plan, and this is what is that objective, the short-term, that we're going to act on in the next 12 months, and what are the steps that are required, the action steps to achieve that objective? Who's going to be responsible for those? What resources are they going to need to do that?

And yes, this takes a little while to do it, but once you've done it, it's like, anybody on this phone call who likes to cook, and if you're going to have a bunch of people over, you'll probably pull out your favorite recipe, and you follow the recipe. You don't just wing it. That's what most dentists do, sadly, and that's why most dentists are struggling. They're not thriving as they could be, because again, they don't have a direction, they don't have the recipe they're trying to follow, and the integrated action plan gives you that.

So again, what is the action step? This is a spreadsheet on Excel, and who's going to be responsible for carrying that out if there's more than one person? Who's going to chair that group? What resource do they need? Don't forget time. Don't forget money if money's needed, and

then the next is what system they're going to use. Are they going to have a series of lunches? Are they going to do a teleconference? How are they going to pull this off, and then when do they begin, and when do they end? Why do you need a beginning date and an ending date? The worst thing you can do is begin too many things at one time.

And then lastly, who's going to be the monitor of that? Usually, somebody who has a stake in the outcome, but they're not part of the primary action team. So and the other thing we have you do in this process, we have you look at your practice three years from today, and what would be your ideal mix of services three years from today, and look at those as if they're lines of business, and then translate that into the fee-per-hour for that line of business.

It's an extraordinary exercise. I think you remember this, Allison, and when you get it done, and you look at what you're doing, some of the things you're doing may not make sense for you to do. Maybe you need to refer those out. And when you look at your capacity, that's what it shows you, you will be staggered.

And we've been discounted by 30%, and it's still a staggering number. So applied strategic planning, it's a passionate way to intentionally live your life.

vortex of energy and intention that, if you're really doing

Dr. Allison W.: You know what I love about it too that we haven't even touched the surface of is I feel like ... Well, I don't feel like I know, but if we go through this process, and we're that clear, our marketing is clear, and then our systems, you know, our hiring is clear, and to me, it creates a powerful

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this right, the right patients feel it, and they know, because you're about, they're about-

Dr. Bob Frazer: I could tell countless stories

Dr. Allison W.: Yeah, the right team members.

Dr. Bob Frazer:

Yeah, I could tell you countless stories of how team members ... We had an office in Kansas, and they were in Topeka, and they were having trouble with certain team members, and they really needed a health relationship coordinator, and so they went through the process of Applied Strategic Planning, and they described who they needed, and they had it in their vision, and they came back to retrieve three with this young woman that they hired that they said went out biking one day, saw their practice, decided she might like to find out if they had any openings. She was a gift from the gods.

And the same thing happens to your patients. You begin to ... There's a karma almost that goes out, and you draw people to you, because you're clear on your mission, you're clear on your vision. The people you love to see, that 25%, or 80% of your revenue, do you know why you love to see them? Because they value what you value. They believe largely what you believe. Godin talks about those people being the sneezers of your idea virus, that they love what you do, and they go out and sneeze that idea virus all over people.

And you're right. When you have this, and it's in writing, and you've taken the time, and it does take a while to do it, we have a short version of ASP, which is just a three-day affair, and then we have the usual one like you went through that's actually three retreats spread over about 10

months. It's extremely powerful, because you get ownership by the team.

And then what happens, also, you know who to choose as your consultants. You know who to choose as your team members, and like I say, they begin to show up on the porch, which you almost have to see it to believe it.

Dr. Allison W.: Well, I've had that experience.

Dr. Bob Frazer: Oh yeah. And I think of you on the phone call, I've had

that too.

Dr. Allison W.: And even if it's not from the moment they walk in, once

you start interviewing them and you're so clear, they can

... You know, they select in or select out.

Dr. Bob Frazer: They feel it.

Dr. Allison W.: Yeah. They feel it.

Dr. Bob Frazer: They feel it. Yeah. Yeah. The other thing that I love about

this is I've probably led, oh, some, not counting my organizational work, probably about 200 offices through this in the 30 years I've been doing it, maybe 250, and every time I'd bump into somebody who's an alumnus, they'd say something akin to what Amanda said,

something akin to what you said, Allison. That was one of the best things I ever did in my life, take the time to really imagine my future for the best it could be, because guys,

your future, you know, getting creative cooperation with it ... And when you go out, go out, run to the finish line.

Make a difference in the world. Leave those footprints on

the sands of time.

The other quote I didn't give you, which is a critical quote, it's the centerpiece of all of our Applied Strategic Planning process, comes from Goethe, Johann von Goethe, the great German philosopher, theologian. He said that the things that matter most in life must never be placed at the mercy of the things that matter least.

I've lectured some 1,000 times. I always quote that to my audience, and I always ask my audience, "Does anyone disagree with that?" So far, nobody's raised their hand. And then I asked the second question. How many have taken the time today, this week, this month, this year, to decide what matters most? And unless you do that, you may end up spending your time with what matters least. So I wish everyone on this phone call, that you get to spend your time with what matters most.

Dr. Allison W.:

Beautiful. I know you have, you mentioned that you have the different versions of ASPF. I know that you have ... I mean, obviously, in person, coached, you know, live, is great, and you also have CDs, and I don't know what you offer on top of that.

Dr. Bob Frazer: Let me do some break my arm, pat myself on the back. We have a website which is, could be a lot slicker and neater. One of the things that Angela keeps asking me, don't we want to upgrade that mark, et cetera, and I love word of mouth, because we've got a lot of sneezers out there. We're just getting people that we want to serve, and they generally come, and they're a little more anointed, if you will.

> But our website is frazeronline.com, and when you get there, you might want to look at strategies for dentist

teams. You might want to go to free resources. There's a lot of interesting articles there.

You might want to go to some of our products. The one that I would most urge you think about is there's about a three and a half hour audio, with guided imagery on it, called applied strategic planning in my life and practice. There's another one that's quite powerful called proven strategies. You can get that as six chapters. They're all about two hours. They're set up at about 12-minute increments, and the proven strategies, each chapter has a title, or you can buy it by the chapter.

The very last chapter is called resourcing your higher consciousness. It was a series of about seven, I think very powerful, guided imageries that you might want to think about. Now you can't listen to that while you're driving your car, because you go running off the road. There's a disclaimer on that, by the way. But if you visit our website, you'll see that. I would also tell anybody who just wants to drop me an email, say, "Hey, Bob. Send me the sort of the skeleton of ASP." Or anyone who says, "Bob, I'd just like to talk to you a bit about my future, where I'm going. That's a no charge call, and I'm happy to talk to you for 45, 50 minutes, whatever, and just give you some guidance and share what I can share with you."

So we'd love to hear from any of you that feel that we can help you in any way possible, and I'll give you all I can give you in that. The other thing, we of course, we have our regular applied strategic planning process that any doc can go through with their spouse, and they just contact us, and we'll talk about that, and we'll set that up, based on your calendar. When Allison went through, we did it in groups of dentists. We still were trying to put one

of those together. Our big challenge with that, if you have three retreats, is get everybody's calendar to coordinate. So it is a little less expensive when you do it that way.

And then we have, each year, we have a very powerful course in emotional intelligence, because if you're not emotionally intelligent, it's pretty hard to lead, and emotional intelligence is just being aware of my emotions and managing those in a way that develops positive outcomes in all of my relationships. I teach that with a gifted counselor by the name of Bill Woodburn, and it's three days in Austin, and it's an immersion experience, and you'll notice that 50% of the people are alumni, sometimes for the second, third, fourth times, and then the other course we offer is the transformational new patient experience, which we're really calling mastering the fifth competency.

You know, if you go to FRAZERONLINE.com you're going to learn that there's four competencies to treat any major technical case. What you don't learn is there's a fifth competency. That fifth competency is the behavioral and communication pieces that allow you to actually get that talent that you've developed with John Coys or Frank Spear, or Pete Dawson, or John Cranom and/or the Pransky Institute, get those off the shelf.

And so we are teaching that now, and I've got two of my colleagues who teach that with me. Those courses tend to be in the fall. So we'd love to have you at any of those. I'd love to speak to you personally the fifths.

Allison, I am always privileged to speak to your audience and to network with the, I'd say, like-minded people.

Dr. Allison W.:

Yes. Thank you so much. Just, you guys, if you do want to get ahold of Bob, his information is at the bottom of the email, but I'll just say his phone number is (512) 346-0455, and it's Bob at frazeronline.com, and it's Frazer.

Dr. Bob Frazer: That's right. That's important. F-R-A, Z like zebra, E-R online, all one word, and then if you call, you'll probably talk to Angela Ward, who was my office manager of many years, some of you know her. She's another hygienist who works with me, so you'll generally talk to Angela. Right now, she's in Indiana.

> What's interesting about our clientele who have gone through this is that 25-30% of them have annual planning of updating their strategic plan, and she's up doing that, and she was in Virginia just the week before that, helping another group update their applied strategic plan, which is a lot simpler and easier than the first time you go through.

So anyway.

Dr. Allison W.:

Wow. I love that we had this call at the first of the year, and I hope that it's inspired some of you, if not all of you, to take a look at what you really desire and start to put a plan together.

Dr. Bob Frazer: Well, I hope I hear from some of you. If you even drop me an email and say, "I liked the first half and didn't like the second," or whatever, and you want to have a call, let's do it, and there's, again, no charge for that.

> And then lastly, and most importantly, I truly believe that the AES meeting, February 21st through 22nd in Chicago, will be a life-changing meeting in the history of our profession, and we will become a starting point for being truly physicians of the whole system, and I hope you'll be

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there, because I think it will be a milestone meeting. And if you do, make sure you put down, "Referred by Bob." I'll make you a presidential VIP.

Dr. Allison W.: Great. Thank you so much.

Dr. Bob Frazer: You're welcome.

Dr. Allison W.: I'm going to just unmute everybody.

Dr. Allison W.: Okay, thank you guys so much for being here tonight.

Bob, thank you. Everybody, thank you for being here. Great call, and I hope you have a great week, and we'll

see you next month.

Dr. Bob Frazer: I'm honored you gave me part of your evening, and take

care all of you.

Thanks for listening to *Practicing with the Masters* for dentists, with your host, Dr. Allison Watts. For more about how Allison Watts and Transformational Practices can help you create a successful and fulfilling practice and life, visit <u>transformational practices.com</u>.