

THE UNIVERSITY PRESENTS:



*The Premier Talent Development Program for  
Private Practice Owners & their Team Members*

# THE 42 MOST FREQUENTLY ASKED QUESTIONS ABOUT THE LEADERSHIP INSTITUTE

LEARN ABOUT THE ULTIMATE  
TEAM DEVELOPMENT TOOL...  
GREAT TEAMS AREN'T JUST  
HIRED, THEY'RE CREATED





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**This magazine includes questions we have been asked from Doctors and Team Members about The Leadership Institute (also known as our University). Our hope is that this will educate you on the importance of developing team members in your Practice as well as having a better knowledge about this unique program designed for Private Practices.**

### 1 WHAT IS THE LEADERSHIP INSTITUTE?

The Leadership Institute, formerly known as the “U”, was created by Jay Geier. Jay developed this from the ground up so that Private Practice owners could have a place to send

individual team members to be coached and developed to improve and grow their area of the business. It is the FIRST, and ONLY, coaching and training program for Private Practices of its kind. When we started it over 10 years ago, the idea was to provide an outlet for other team members (besides just the Front Desk) to have coaching to grow other areas of the business. We could double a practice in terms of its new patient numbers, but the “back” office (assistants, hygienists, and office managers) weren’t necessarily growing at the same rate. We realized that you need an army, not just a soldier, to build your best practice ever. It can’t stop at the front desk.

At the Leadership Institute we have impacted over 25,000 team members around the country – really around the world – and we have grown into the most elite coaching academy of the best teams in the entire industry. That’s what the Leadership Institute is. It is designed to address other areas we have identified as having huge opportunities for growth for Private Practice owners. The wonderful thing about education is that once you have it in your brain, you own it for life, and that’s very exciting. We’re very aware that we are in the business of changing lives, and we don’t take that lightly. So, when someone has an experience, and when someone learns something, they get to have that for the remainder of their life, which is fantastic.

### 2 WHAT IS THE UNDERLYING PHILOSOPHY OF THE LEADERSHIP INSTITUTE?

The primary philosophy is “you get what you deserve”. That means, we are teaching your team that if they would like to do better, they are going to have to create value within the practice. You can’t really expect things to get better unless you create greater value, and so that is a very important, fundamental process. Along with the “you get what you deserve” comes what we call “no excuses” which means that we just simply don’t make excuses.

### 3 WHY SHOULD I SEND TEAM MEMBERS TO THE LEADERSHIP INSTITUTE?

When you look at the five major areas to invest and focus on in any business (Team, Financial, Marketing, Space & Equipment, Clinical Duplication), you can see this is an investment in developing your PRIMARY ASSET your team

... and depending on what courses you select can impact other areas as well.

Jay created the Leadership Institute because he found that there was nowhere our clients could send someone to be coached and elevated, and where they could get the appropriate materials taught to their team. If you want to get an individual team member really motivated and if you want to have a dream team, you must continue to provide them with the tools they need to grow – you don’t know what you don’t know and that goes for your team as well.

We have found that most doctors have a vision of a great team, but they can’t express that vision. Sometimes it helps coming from another outlet...we work with your team to help them understand and become that dream team member. Plus, they will be surrounded by goal-oriented team members (in the same role as themselves) from offices

## GENERAL FAQ / WHAT IS THE LEADERSHIP INSTITUTE ALL ABOUT?

across the country motivating them to reach their true potential. They will get to witness first-hand the growth and progress of other offices and begin to realize if they can do it, so can they!

You must understand the power and the payback of investing and developing your team. Developing a strong team is FOUNDATION AND KEY to a thriving business. If you aren't learning, then you aren't progressing. If you would like to step up your level of accountability with your team, if you would like to step up the amount of performance pay that your team is able to earn, and if you would like to significantly increase their engagement and ultimately find out if you have the correct team members, then sending team members to the Leadership Institute is an appropriate investment for you.

### 4 WHO WILL BENEFIT THE MOST FROM THE LEADERSHIP INSTITUTE?

A growth-oriented doctor. If you're not growth-oriented, there's no reason to make this investment in your team. If you can't keep pace with the team, it's not going to be good. We suggest that you only enroll if you have a desire to move the practice forward and that you are

very committed. You can't be committed on a temporary basis – you must be committed on a full-time basis, because it is possible that we could get the team so fired up that you might not be able to keep up with them. You must be a doctor that is willing to empower your team to grow your business. A micro-managed team can't progress at the speed of an empowered self-managed team that is trained to own their role and is accountable for their actions and results.

## 5 WHAT WILL THE TEAM LEARN IN THE LEADERSHIP INSTITUTE THAT THEY CAN'T GET ELSEWHERE?

and there's no accountability. Training is the greatest exposure, and it's also the greatest exposé of people. If you want to find out the truth about your team, one of the things that you do is train them. And when you complete that training, you will either see one of two things: you'll see them avoiding responsibility or taking responsibility. And the great news for you is that it's very cheap to figure out that you have the wrong person. It's important that you understand how to respond to those various things. When you have a person who rejects training, you have a person who you've just discovered is not a great team member. And that's very, very important to learn. Would you rather invest years of payroll and salary to not get the results that you wanted or, realize quickly that they are not the right fit for your vision and replace them with someone that will over deliver for their paycheck?

The other thing your team will learn is how to get on the same page with you. Most programs teach people micro strategies. We teach them how it all comes together, which is very exciting. Every team member will know his or her role in the growth of the business.

The entire curriculum in the Leadership Institute has been designed for the purpose of accountability. Most of the seminars and things that you go to are nothing but entertainment. We are not bashing anyone, but they're entertainment. That means that somebody gets up, they entertain you, and there's no follow-through



### 6 IF I ENROLL MY TEAM, HOW WILL I BE BETTER OFF THAN I AM NOW?

emotionally, mentally spin all the plates at one time – you need others focused on spinning their own plate! Not only are they going to have accountability, but they're also going to have some self-development. It's almost like it puts them on a course or a path. We feel very strongly that every team member is better off. Are they going to come back from every meeting and say to you, "It was the greatest thing that has ever happened to me"? Maybe not (although that has been the feedback from many doctors), but we do expect the results of their changed behavior will be dramatic. The bottom line is when you look at how better off you are, this is a result driven program. You're going to see specific statistics driven up, and you're going to see more ownership of those statistics, which means responsibility and more of a team driven office versus a doctor driven office.

Making an investment in your team's self-development means getting them focused on what they need to be focused on...and that's a universal principle. You can't physically,

**"I have been a part of Jay Geier's training for a few years and I have learned so much. I have drastically improved my telephone skills as well as my scheduling skills. I recently visited The U in Atlanta, and it was very POWERFUL! Our office has increased production and our new patient numbers have almost doubled since being a part of this. I love what The U has done for our team, and I strongly believe that anyone who is not a part of this is REALLY missing out!"**

- MONA CIRLING FROM DR. JASON AND TODD SALA'S OFFICE - RENO, NV

## 7 HOW MANY TEAM MEMBERS CAN I SEND TO THE U?

You can send ALL, or just one! Again, we develop a curriculum and program that is tailored to your needs.

To enroll, we will have a

certified Advisor take you through a Talent Development Planning Worksheet either in person or on ZOOM. We will review your Talent Pipeline, determine what areas of your Practice you want to focus on and grow, and what team members you want to invest in to elevate. Do not send Tire-Kickers...send team members you have confidence in, this will make a difference in your results.

In a time of the “Great Migration” where team members are leaving left and right, this is a great way to show your team you value them and want to grow and invest in them.

## 8 WHAT IF MY TEAM MEMBER DOESN'T WANT TO DO THE U?

Well, we have great news for you. Usually that means you have the wrong team, because one element of a correct team member is a willingness to learn and to grow. So again, use this

as a test of engagement. Usually, we can spot them on day one. If you have an on-site trainer come in, it's important you ask them at the end of the day, “If you were me, who would you let go?” because they can probably tell you. It's very simple.

## 9 WHAT IF MY TEAM MEMBER DOESN'T WANT TO TRAVEL ALONE?

We have no great answer for this question. Maybe you shouldn't

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send them. You certainly can't hire a babysitter, so you can't send them. If Jay asks our team to do something, they all say, "I'll do it. I'll do it. I'll do it."

Where you see smoke, you'll find fire. When you get a lot of no's from people, there's a lot of resistance going on that you're unaware of. If you find that the team member is an overall good asset to the business, but is still hesitant to travel, then most likely it is fear of the unknown. Many people fear what they don't know or the unexpected. You will set the tone for their acceptance. If you present this as an opportunity for not only the business, but as an investment in their career and the potential for compensation increase as they increase their results, then they will be more willing to tackle their fears.

Providing your team members with the opportunity to travel may very well be their first time out of your state...or town! We've heard such great feedback from team members saying they were so excited to get on a plane and get out of their normal routine and meet people that do the same thing as they do. There are not many Doctors in the world that provide this type of experience and training for their team.

### 10 WHAT IF I'M NOT A DENTIST?

For those of you that are not dentists, we have many courses you will find helpful – literally ALL courses are suitable for any type of Practice except Hygiene Team Member. Full list of courses is below.

### 11 WHAT IF I DON'T HAVE A TEAM THAT I WANT TO INVEST IN?

We've heard this lots and lots of times, and it's very frightening by the way. The first question is "How do you know you don't have the right team if you haven't invested in their skills?" You as a doctor, have improved your skills since graduation because you have invested in courses and trainings to better yourself. Your team needs these same opportunities to improve their career skills. And so, what that means is that you clearly have some work to do. Just saying you don't have the right team, and not doing anything about it will not get you any change in your team.

It's better to give them opportunities to grow vs. do nothing at all and keep them in your Practice. WHAT IS YOUR STRATEGY? Don't be complacent that doesn't help anyone – especially not your business.



## 12 WHAT IF I'M HAPPY WITH MY TEAM AND HOW THEY ARE?

Fantastic, congratulations. Again, complacency creeping in is where your growth stops. Most people, if they looked at Jay's life would say," Jay, you should be happy with where you are.

You should just stop where you are." Stopping is kind of like an airplane. You can't stop an airplane in midair. If you try to stop that sucker, it is going to fall to the ground. Practices are very much that way. When you try to keep a practice at

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a certain level and you say, “Hey, we’re just going to stay the way we are,” then the practice tends to go down. It doesn’t tend to go up. It’s about upward movement. You should always be grateful for where you are, but never satisfied if you want to grow.

**“I have been a part of The U for 2 months now. Our practice has grown like crazy! 76 new patients last month! My hygiene production has grown along with my patient acceptance rate. I would recommend The U to any practice that wants to grow.”**

- MARTI CARDER

### **13 WILL SENDING SOMEONE TO A COURSE CREATE EXTRA WORK AND EFFORT ON MY PART?**

Your team members should report back to you what they learned and how they plan to implement. We will communicate with your team directly. Your job is to support these people. If they do a nice job, you’re to provide positive reinforcement and not be a negative influence; and we’ll help you with that. But it’s a very small-time commitment on your part.

### **14 WE ARE SO BUSY... SHOULD I REALLY ADD ON SOMETHING ELSE RIGHT NOW?**

We hear this all the time...” I just want to do what I have”. The great news is that this

program, is little to no extra effort on the Doctor. AND...it's designed to help your team take more ownership of their area and statistics so that you don't have to feel like you are the one doing everything all the time.

## 15 WHAT WOULD A MORE ENGAGED TEAM LOOK LIKE?

Your life is so much easier with an engaged team, and you'll never know that until you have

that team. We are very fortunate to have many clients that have been with us for 10+ years. When we interview those clients and ask, "Tell me the difference between your team today and five years ago," you should just see the look on their face. They just go, "Oh my gosh, I can't believe that was my team." What you find is less stress and it's very exciting to have an engaged team.

## 16 WHAT IF I DON'T THINK MY TEAM CAN ACHIEVE THE RESULTS FROM ATTENDING?

Well, that's a shame, and most likely it means you have the wrong team and maybe you just don't have faith and confidence in them. We know that one of the things that happens with most doctors, since most of you are heavy fact finders, is they don't have a lot of trust and confidence, and they

happen to be perfectionists. One strategy that you must use to work around your calamity is to go ahead and test that out. You might just be wrong. You might just be holding onto things so tight that you haven't really delegated appropriately to your team. You haven't trained them. You think you have, but you haven't. Therefore, you should test. Let

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someone else try and see if we're right or we're wrong. Don't think that just because your team is a certain way today, that it's the way they're always going to be. It's new. Exposing them to new things is what's so important. You must put your team in a position to win, and sometimes you can create that for by giving them the tools and opportunity.

### 17 HOW LONG DOES IT TYPICALLY TAKE TO START SEEING RESULTS?

Usually, you'll see a change the day after people come back. Big results may take ninety days, but honestly you should see immediate change in the way people do things

because it's that quick. This program is 100 percent about producing results, and that means you must look at the data.

### 18 HOW MANY PARTICIPANTS HAVE ALREADY ACHIEVED THESE RESULTS?

How many participants have already achieved these results?

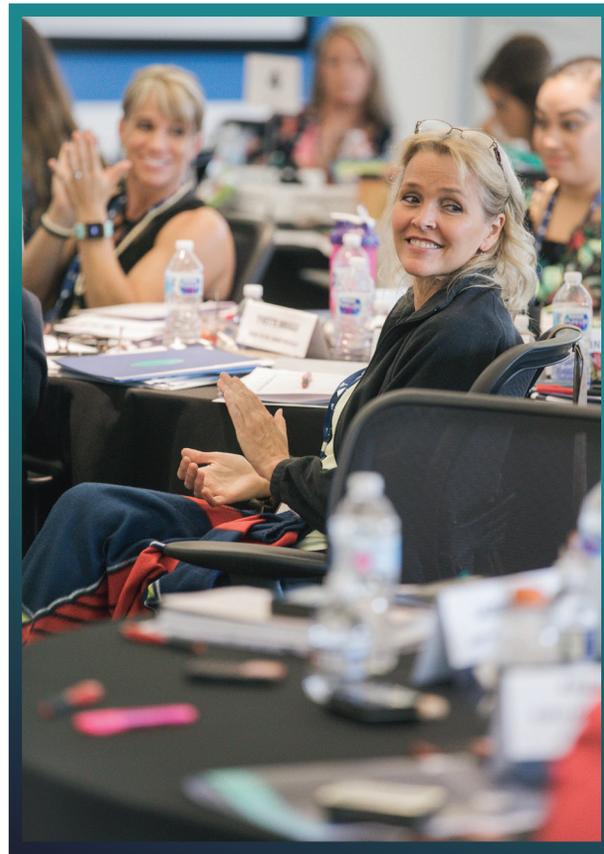
We have coached over 25,000 Team Members in our University. Based on the historical data over the last 10 years, on average a person that attends increases the personal statistic by 10-30%+ (which more than pays for your investment)!

### 19 WHO CAN ATTEND THE LEADERSHIP INSTITUTE?

Any person who works in a Private Practice who wants to grow their area. We are focused on ALL TEAM MEMBERS – we have courses for the Providers (Doctors/ Associates), Owners, Management and Team Leaders, Team Members and New Hires!

### 20 HOW DOES THE LEADERSHIP INSTITUTE RELATE TO THE REST OF THE SCHEDULING INSTITUTE?

This program is the engagement device for the entire team or a particular area of concern, weakness and/or strength. It literally ties right in. You are going to see many of the same strategies. We are not going to reinvent strategies. We know what the right strategies are, and so we use many similar strategies while teaching to get the kind of results we do in terms of new patients...we just apply them in all these other new areas.



### 21 WHAT IS THE DIFFERENCE BETWEEN IN OFFICE TRAINING AND SENDING SOMEONE TO THE LEADERSHIP INSTITUTE?

There are many differences, but the primary two are #1. The *content is different* and #2. The *format is different*. If you are a Coaching member, you understand getting

## DIFFERENCE BETWEEN THIS PROGRAM AND OTHER OFFERINGS

out of the office to work on the business with like-minded doctors is a much different experience than having someone come to your Practice. The offices that see the best results do a combination of both – your trainings will STICK better when you have team members enrolled in the Leadership Institute. One of the greatest benefits of participating is *networking and learning from other individuals that have the same position as you in another office*. There is NOWHERE on this planet you can go to develop a specialized network like this.

## 22 HOW IS THE LEADERSHIP INSTITUTE DIFFERENT FROM YOUR DOCTOR COACHING PROGRAMS – PLATINUM AND 5X?

Platinum and 5X are coaching programs specifically designed for the doctor – it is DOCTOR coaching and development. Establishing your vision, goals, financial house, etc.

The Leadership Institute is focused on many individuals in a Practice (Doctors and team members) and many facets of the Practice. This is a support vehicle for you to grow more areas.

## 23 HOW IS THE LEADERSHIP INSTITUTE DIFFERENT FROM A GOLD MEMBERSHIP?

Gold is a fantastic team engagement program. It's important to understand that Gold has a primary focus of increasing new patients and improving patient service. All of that is delivered in your

office at your site. There is a huge difference in “the experience” you

## LOCATION

and your team have when you leave the confines of your office as we discussed before – it initiates change and will provide those “aha” moments. We find that there are benefits when you get away from your building, you get away from your life, and you can look back at it and get a fresh perspective. It’s specialized coaching. In Gold, we’re not dealing necessarily with a hygiene program or an assistant program. It’s about your New Patient numbers, whereas these courses are very specific for team members and individual coaching, performance, and statistics.

## 24 WHERE DOES ONE ATTEND THE LEADERSHIP INSTITUTE?

We have two convenient locations where we host all our Leadership Institute courses – Phoenix,

AZ and Atlanta, GA. We encourage you to enjoy BOTH locations! We have our own uniquely designed and updated private spaces for you and your team. Our Atlanta facility just went through a massive \$1 million dollar renovation to make it an exciting new experience for everyone visiting. Both of these locations are close to the airport making for easy and expedient travel.



## 25 WHEN IS A SCHEDULING INSTITUTE MEMBER ELIGIBLE TO ENROLL?

For years, we have offered University courses for our Coaching clients only...and for the last few years, mainly Practices with Team Leaders. NOW, we are offering courses for all memberships and all 4 areas of your business – The Owner Doctor, Providers (Partners/Associates), Management and Team Leaders AND Team Members. This provides something beneficial for all members – NO MATTER WHAT MEMBERSHIP LEVEL YOU ARE.

PLUS, it's not all or nothing like it has been in the past. We will help you determine which courses are best for you and who to send! It is completely custom to match your current needs.

## 26 HOW LONG DOES MY MEMBERSHIP LAST WHEN I ENROLL?

You are considered a member for 24 months from when you invest. This means that when you have credits you can use them now – 24 months before they expire.

## 27 WHAT IS A CREDIT SYSTEM, AND WHY ARE YOU USING A CREDIT SYSTEM?

In previous years it was all or nothing. If you wanted to send your team to the U, you would invest in the entire package that

**“The U is an excellent tool for our office! Before we had the U, I felt like the entire team wasn’t all on board. Now, everyone is! It really brings everyone together and keeps everyone involved and striving for more! We have seen major changes in our practice since we have started the Scheduling Institute, but now everyone in our office is excited about what is to come and what they are learning. The U is a wonderful program!”**

- HALEY GORDON FROM DR. BRUCE BURLEY’S OFFICE - HAGERSTOWN, MD

included 4-9 courses and it was \$30,000 - \$40,000. We found that some Practices did not have enough team members to utilize all the courses – therefore did not enroll. Or some specialty practices could not utilize a particular course, etc. And we know this is a decent investment – now, with 1 credit courses, you

can send someone for just \$2,500 (until we increase the rate)! You can invest in as many credits as you need, even if that is just one!

In addition, with the credit system, you can customize your course load – which courses and how many. We offer complimentary Talent Development Planning calls with our Leadership Institute Advisors to help you select which courses best fit your needs. In addition, your credits can be used over a 24-month period. This way you can invest in more credits to save more up front...OR, if you have turnover and were planning to send someone that is no longer there, you can hold that credit for another course within your 24-month time frame.

Is it worth 1-6 credits to send an individual to the Leadership Institute? Do you value having an individual coached to increase their statistic 10-30% and have them more engaged and trained? Then, YES! There’s absolutely no question it’s worth it. Plus, statistics show that your

## ENROLLMENT / GETTING STARTED

retention is higher when you invest and train team members, and they are more loyal employees. It's a fantastic investment.

### 28 WHAT IF I DON'T KNOW WHICH COURSES WOULD BE BEST FOR ME OR MY TEAM?

What if I don't know which courses would be best for me or my team?  
You are not

alone! Majority of our teams enrolled have started off with a consultive Talent Development Planning call via ZOOM. Typically, our specialist calls are \$1,997, however, as we are rolling out the new Program, we are offering them complimentary for Practices + 1-2 Team Leaders this year to learn more and help with enrollment. If you would like to have someone walk through YOUR TEAM, YOUR NEEDS, and the best courses for you we have Advisors on our team that can walk through your talent pipeline and have a meaningful, intentional conversation about who to develop and train in your Practice. This way you can get the number of credits you really need to get your Practice to the next step – whether it is 1 credit or 60!

**To give you an idea, on average our Gold Doctors have 8 credits, Platinum Doctors are investing in 13 credits, 5X are investing in 24 credits and 5X CEO are investing in 36.**

### 29 HOW DO I PREPARE MY TEAM?

There's not a lot of preparation. Although we have orientation calls and processes, we take them through, the main thing that any doctor must do to prepare his team is simply just say that



you are fully committed to the process and that this is not something you're asking them to review. This is not something you're asking their opinion on. You're asking them to be 100 percent engaged. You are asking them to follow the advice and processes that they learn. You are asking

them not to make individual decisions about what it is they implement and what they don't implement. All this should be done in an open dialogue. That's about all the preparation that you need to do.

## 30 WHAT IF I CAN'T AFFORD THE PROGRAM?

For those of you that are new to the program, you know that you should never say those words. Investments are

designed to pay returns. When anyone says they can't afford to make an investment, typically that means that you have a person who is in financial trouble. You've got to learn to get out of financial trouble, and the greatest way to get out of financial trouble is learning to make great investments.

In addition, we've designed the program so that it is not all or nothing. Meaning you don't have to invest in every single course to be a part of the program. You can simply invest in one team member now if that is what you are comfortable starting with.

# 31 WHY SHOULD I INVEST NOW? WHY CAN'T I WAIT UNTIL CLOSER TO THE COURSE DATE?

- ➔ Ideally you have your team training program laid out for the entire year – this shows your commitment, engagement and intention around providing team members the development they need.
- ➔ This way you can manage and plan your patient schedule accordingly and book travel in advance to save more.
- ➔ Courses will fill up, it is not unlimited capacity, and many courses will not repeat. You don't want to snooze and lose. We will adjust the schedule to meet demand and needs of our doctors.
- ➔ When you commit to more credits at one time, you will save more. The credits can be used for up to 24 months and your payments can be spread out over 24 months if needed.

# 32 HOW DO I GET STARTED AND ENROLL?

Unless you know EXACTLY which course(s) you want to select, we highly recommend scheduling a Talent Development Planning Call.

You can visit [www.SiLeadershipInstitute.com](http://www.SiLeadershipInstitute.com) to schedule your planning call.

OR, you can schedule a call by calling **(833) 331-0157** to speak with one of our advisors.

If you are ready right now to enroll, you can buy credits on [SiMembers.com](http://SiMembers.com) or call **(833) 331-0157**.

## 33 HOW DO YOU SELECT THE COURSES AND THE FREQUENCY?

How do you select the courses and the frequency?

Courses are selected and scheduled based off your needs and the demand. We will add courses throughout the year. Some courses will

be one time, one chance only – and some we will continue to provide yearly. Courses calendar can be found on [Simembers.com](http://Simembers.com)

**“My experience at the Front Desk U was honestly filled with enlightenment and great fellowship. I believe that we all struggled with certain levels of uncertainty in the workplace. We all want to do better and make our office more productive as well as provide extraordinary service for our patients. The U provided a great forum to come together with our peers and discuss our struggles as well ideas to overcome them. The mantra that was given for the day was, “The eyes only see, the ears only hear, what the brain is looking for,” has become something that I use daily in all aspects of my day not just work. The U has given our office the tools and the guidance to work better as a team as well as in our individual areas, all the while staying focus on the growth and productivity of the office. By implementing those tools, we had 138 new patients the very next month and record productions along with it. The U is something I am glad to be a part of and would not hesitate to recommend that other take part as well.”**

- CAROLYN LINDO-BEST FROM DR. JOHN DIETRICH'S OFFICE - PORT CHARLOTTE, FL

### 34 WHAT TOPICS ARE COVERED?

responsibility, owning their statistics and tracking, tools to grow their own statistic, the two-economy system and much more. Each course has different curriculum and content that is designed to increase that person's results! We have certified Faculty and special guests that train your team members.

Here are just a few items we cover in the courses: engagement, personal

### 35 WHAT DOES EACH COURSE INCLUDE?

While formats vary between courses (refer to our course catalog). The primary factor is that they will COME to either Atlanta or Phoenix for an interactive, workshop with people from other teams across the country. Majority of the courses are 1.5, 2

**“Last month our clinical, admin and team leaders were able to attend The U. It is amazing to see everyone so excited and focused on growing the practice. If you are considering attending The U I would Highly recommend it. Unlike other courses or seminars that I have attended where I have received information, been sent home, and then left to figure it all out on my own - the team at The U have been remarkable about staying in contact. We have a personal liaison that I have shared phone calls and emails with, we have received CDs, tracked our results and has call in days where we have celebrated our successes and had support for our questions. Take this opportunity and join the U!”**

- MADELINE WEIDNER FROM DR. CALDON AND O'CONNOR'S OFFICE - PLATTSBURG, NY

or 2.5 days. We will communicate DIRECTLY with each team member you enroll, and they will have their own Dashboard on Simembers.com. In addition to the live workshop, some courses will also have virtual learning, share days and more.

## 36 WHERE CAN I FIND THE COURSE CALENDAR?

We don't mass distribute and publish the calendar until you are enrolled. We want you committed to growth, and you will make your calendar work to make it happen vs. using it as an excuse. If you absolutely, must have it to decide, we can provide it to you. And secret tip, it's also located on SiMembers.com

## 37 WHO IS ON THE LEADERSHIP INSTITUTE FACULTY?

We have speakers that are trained in their field and have only been hired directly by Jay Geier because of their results they have delivered in their careers. We will also invite guest experts to teach sessions as well – for example Doug Lipp from Disney U and Kindra Hall Best-Selling author of

Stories that Stick are two that are joining us this year.



## 38 WHAT COURSES ARE YOU OFFERING FOR THE OWNER DOCTOR?

worth, get out of debt, accelerate cash flow, make better investments and more! This will be a ONE-TIME, 3-day event hosted outside of our Leadership Institute facilities at the Sandestin Beach and Golf Resort.

This year, Jay will be personally hosting the primary course for the Owner Doctor – Financial Freedom Summit. This course is the only one that includes 2 seats for the Owner and Spouse. You will learn how to increase your net

## 39 WHAT COURSES ARE YOU OFFERING FOR PROVIDERS & ASSOCIATES?

high return courses has been the Associate Bootcamp. Now, this course is for ALL doctors – Associates and Owner Doctors (who still Practice) teaching them how to increase their monthly production numbers. Our goal is to transform every doctor in your practice to be a successful, profitable, and positive producer who can generate real results.

For years, one of our most popular and high producing/

In addition, this year, due to the increasing turn-over rates and difficulty in hiring, we are adding a brand-new course – Clinical Talent Development. The person who attends this course would be the Clinical Director or Primary Owner Doctor. The goal is to protect one of your greatest assets in the practice, your providers – these include Associates, Hygienists, Nurse Practitioners, Behavior Analysts, etc. This course will give you the tools to recruit, mentor, coach and retain providers in the practice.

“I wanted to reach out and give a well-deserved ‘thank you’ for the help you were to me at the Financial Coordinator course! I was coming in extremely new to this role with a lot of questions and you were extremely kind and helpful to me. Since I have returned, things have been going very well! Our acceptance rate was hanging right around 41% for the last year or so and we ended September at 61% (20% increase)! I also have had discussions with Dr. Stamatiades and Kelli on ways to add more “tools” to my toolbelt. As of last Friday, we have officially added a new method of payment for our patient’s convenience, and we have started offering complimentary whitening with Invisalign acceptance. Lastly, this morning I was given the award for Employee of Quarter 3! What an honor! I give you credit for your wisdom and motivation to get me off to a fantastic start in this position.”

- CAROLEEN LUTHER, ZOE DENTAL

## 40 WHAT COURSES ARE YOU OFFERING FOR THE TEAM LEADERS AND MANAGEMENT?

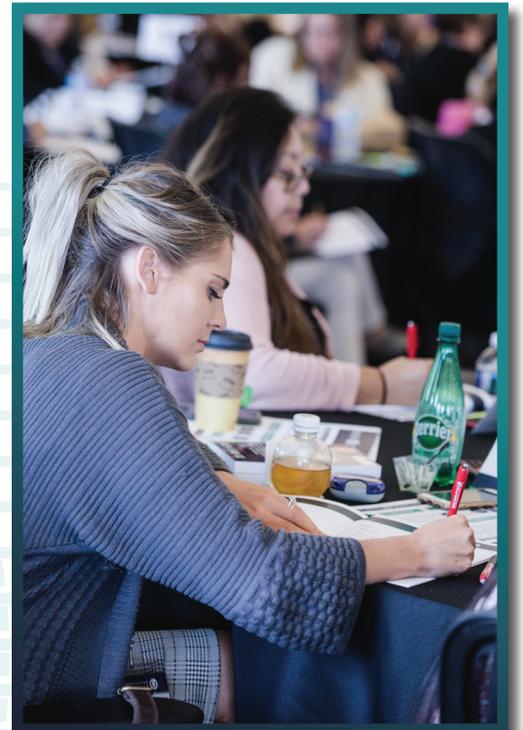
- ➔ **OFFICE MANAGER:** Develop tools to foster interconnectivity and effective collaboration across the practice. Tackle big priorities on all fronts and learn how to build a network of supportive leaders – Office Managers will take more ownership in increasing collections.
- ➔ **HR – RECRUITING:** Learn how to attract talented team members and develop evergreen processes for recruiting all areas of the Practice. The goal of this course is to find top talent that will provide greater value to your Practice.

## COURSE FAQ

- ➔ **CLINICAL TEAM LEADER:** Become an effective leader who inspires a high-performing, high-producing team. The goal is to increase overall Hygiene Production in this course.
- ➔ **FRONT DESK TEAM LEADER:** Turn up your New Patient game across the board – keep the team 5-Star certified and provide new and existing Patients with outstanding customer service while increasing the New Patients that come to your Practice.
- ➔ **FRONT DESK TEAM MEMBER:** Drive New Patients within the Practice and gain skills to become more valuable to the business.

# 41 WHAT COURSES ARE YOU OFFERING TO DEVELOP OTHER TEAM MEMBERS?

- ➔ **ASSISTANT TEAM MEMBER:** Drive Doctor Production and develop a leadership mindset and growth without having to have the title.
- ➔ **HYGIENE TEAM MEMBER:** Drive their personal Hygiene Production within the business.
- ➔ **MARKETING DIRECTOR:** Develop a marketing machine that can easily increase new patients through tested, strategic, and tracked marketing plans.
- ➔ **FINANCIAL TREATMENT COORDINATOR:** Improve the quality of financial presentations so that you can increase case acceptance rates.



## 42 WE HAVE LOTS OF NEW HIRES, IS THERE ANYTHING I CAN DO FOR THEM?

provide immediate integration for your new team members that will teach them the basic principles of growth including, the bubble, the impact diagram and more.

We have lots of New Hires, is there anything I can do for them?  
Yes, absolutely! We have the Virtual New Hire Bootcamp where you can

## 43 ANY OTHER COURSES OFFERED?

from Doug Lipp, Former Head of Training at the Disney University, on how you can apply the principles taught at Disney to grow your Practice, your Leaders, and your Patients.

This year will host a few one-time specialties. Upcoming we have, The Secret to DISNEY'S Success...and YOURS! Learn

**“The U was a great place to rejuvenate our team! It helped everyone understand their positions and how valuable they are to the success of the practice. Everyone came back focused, refreshed, and motivated. Everyone seems to have more of an emotional connection not only to the Patients but now to each other. We have had record high increases of New Patients, Patient referrals and production every month since coming back from the U. Staying focus on the positive moments is something we strive for everyday!”**

- CHRISTINE MAROSKI, DR. FABEY'S OFFICE



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**“I spoke with Christa, from Dr. Hayslips office today. He just went 5X in March. I asked her how the U went, and before I could even finish my sentence, she said it was LIFE CHANGING! She has a completely new outlook on what she does, and how grateful she is to have this opportunity to give back. She said when they went 5X she was so overwhelmed and didn’t even know where to start. They have a very small team too, so she was doing a lot on her own.**

***She came back fired up!!!***

- ⇒ Hired 3 new people - a marketing director, treatment coordinator, and new front desk.**
- ⇒ Their FIRST ever dentistry from the heart day is now scheduled in August**
- ⇒ Instead of their typical employee meeting next week, they are surprising the team and doing a “give back to the community day”. They are shutting down the office, are giving the team members \$500 each to go out and have a random acts of kindness day! They bought t-shirts to give out. After its over they are coming back and sharing all their stories!**
- ⇒ Over the holidays they are doing a campaign “smile for the holidays”. The community will nominate someone, and there will be ballot for one of the nominees to receive a free smile around Christmas!**

**She said, “I wouldn’t have done any of this if it wasn’t for The U. I would go 3 times a year if I could. I told Dr. Hayslip that we must send ALL our leaders to every U available next year.”**

**- BRITTANY D., PROGRAM ADVISOR, SCHEDULING INSTITUTE**

**“I just want to share a little bit about how the U has already made an impact on me. As marketing director for Greece Family Dentistry & Implantology I try to utilize and have set a “double” goal to grow our social media marketing. I’ve always received the insights in little snippets here and there BUT already, as part of this program, I’ve learned how to apply the correct filters to see specific data in applicable time frames. This has been so helpful to see the reach of each post by each quarter or month. We’ve taken this information to evaluate “when” to boost campaigns or create ads. And monitor them to know if they’re effective. This has also really helped me to learn more about our followers -what they like to see what they’d like to see more of. I can then post more of what they want, what they’re looking for, to create more engagement and to extend the reach so that when we have offers and promotions it’s more effective. Thank you! Looking forward to an awesome year! ”**

**- CHRISTA CABRER, GREECE FAMILY DENTISTRY &  
IMPLANTOLOGY**

