

NEW
UPDATES
5/20/22

Scheduling Institute's University Presents



THE PREMIER TALENT
DEVELOPMENT PROGRAM

2022
COURSE
CATALOG



RESULTS RULE | Discover why team members who attend The Leadership Institute outperform the industry standard and generate impressive results within practices around the world.



DELIVERING *Value*

The Leadership Institute's talent development model is...
Distinctive. Highly Relevant. Innovative.

We feel fortunate to be in a position to provide resources in ample supply to ensure every team member who is a part of our program receives elite training in an inspiring environment with caring people. Having coached over 25,000 team members at our leadership facilities, we are honored to continue our mission of impact.

EXTRAORDINARY OUTCOMES

Team members who are a part of The Leadership Institute often become top professionals in their specialized area. They produce at higher levels, generate double the number of new patients as industry standards and create experiences unlike any other for their patients. It's because of these results we've had the opportunity to work with so many practices around the world. In turn, we appreciate the gratitude these practices have afforded us by voting us 18-Time Townie Choice Award Winners in the category of "Consultant & Advisor."

While these awards are an important reflection of our coaching and program reputation, the accolade we care most about is what happens in the lives of the team members that are a part of the Leadership Institute. This includes how they grow, how they perform

professionally, and how much value they extract from their experience at The Leadership Institute.

PRACTICAL AND PRINCIPLED

We believe in a principle based coaching philosophy, where team members engage in learning through the exploration of fundamental truths that have withstood the test of time. We acknowledge that the market is not static, so we strive to equip team members with evergreen tools to thrive in an ever-changing, demanding workplace. Our practical approach to talent development also ensures that team members are armed with tangible strategies that can immediately be applied into practice.

AN ENVIRONMENT OF EXCELLENCE

Most recently, our Leadership Centers have undergone a million-dollar renovation. When you visit these facilities, you'll see intent behind every detail of our buildings. We understand the competitive advantage that comes from getting outside the four walls of the practice and experiencing what it's like to be invested in. This is why, we surround our participants with the materials, the brain-trust, and the growth minded attitude we know fosters an environment of impact and results.

THE MAGIC IS IN THE MIX

At The Leadership Institute, we think of our community as a league of high performing, patient centric, results creators. Team members come from all levels of experience with varying backgrounds and fields of service. It's a beautiful ecosystem where everyone is empowered to problem solve in innovated ways, develop accountability partnerships, and support one another in deep and meaningful ways.

If you haven't recently attended a course, let this be your friendly invitation to discover the magic that is The Leadership Institute.

TALENT DEVELOPMENT



PROVIDERS

Develop a clear picture of what you need to multiply



LEADERSHIP MANAGEMENT

Ex. Office Manager, HR, Team Leaders

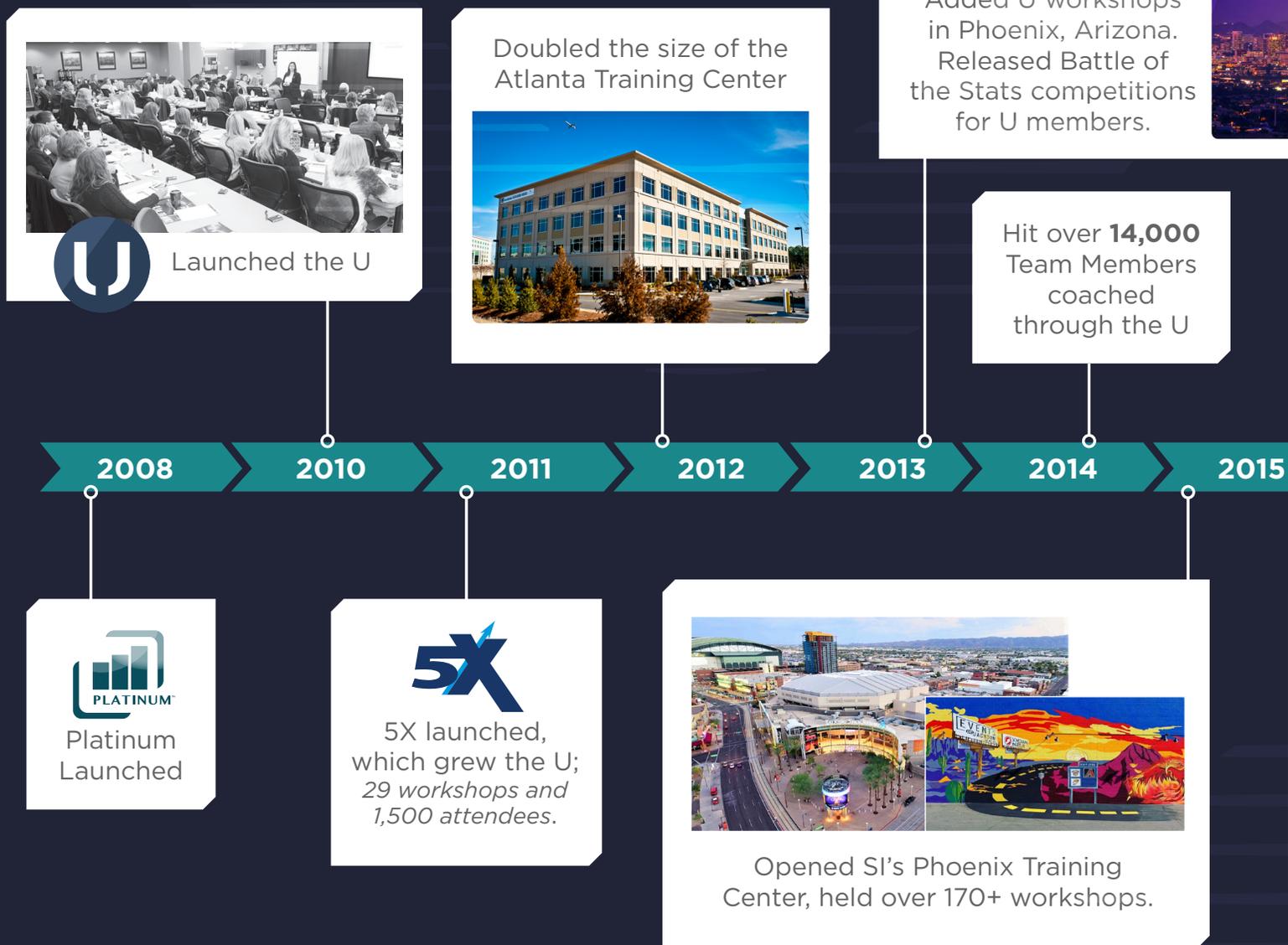


INCREASE PRODUCTIVITY & DEVELOP TEAM MEMBERS

Ex. Front Desk, Assistant, Marketing, Hygiene, Treatment Coordinator

INSPIRING INDIVIDUALS FOR

Our expertise lies in coaching team members. Over 25,000 team members from all over the world have been a part of our programming since it's inception in 2011. Our history is rooted in providing instruction that yields results for individuals. We are proud of the many team members who have been a part of this legacy and look to continue our mission of excellence for many more decades to come.



OVER A DECADE



Launched the U New Hire Bootcamp and U Accountability Days



Hit over **20,000** team members coached through the U



Ushered in The Big Year Contest focused on leadership and delegation.



Set the Big 5 Flywheel in motion and designed dynamic Team Events to impact the 5 critical components of practice growth.

2015 2016 2017 2018 2019 2020 2021

Introduced the Executive Leadership U Program to help create a Category of One Practice. At the end of the program a 5X Leader of the Year was awarded with the ultimate cash prize.

SI TEAM TRAINING UNIVERSITY



Unveiled our Results Creator Bootcamp Program. Designed to target key areas of the practice, participants embarked on a journey towards becoming a true Results Creator within the practice.



Brought on a new class of Results Creators and equipped team members with the tools needed to navigate unprecedented challenges brought on by a global pandemic.

LEGACY OF WINNERS...



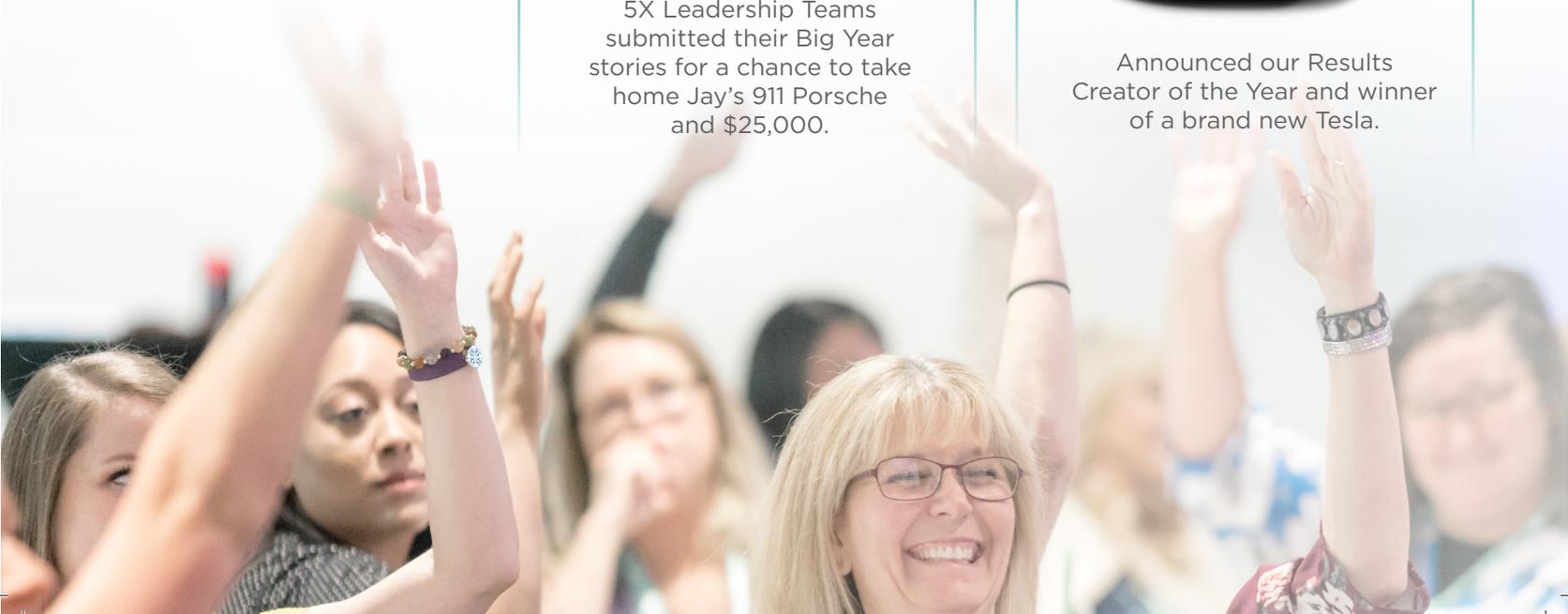
Gave away four Jeeps to the best Assistant, Hygienist, Front Desk, and Team Leader!



5X Leadership Teams submitted their Big Year stories for a chance to take home Jay's 911 Porsche and \$25,000.



Announced our Results Creator of the Year and winner of a brand new Tesla.



MULTIPLYING IMPACT



This year focus on your multiplication of IMPACT. Invest in 20 or more credits in this year's Leadership Institute and become eligible to win a Mini Cooper for the office. What you decide to do with the car is up to you but be sure to MULTIPLY it's effect. The practice who submits the best plan of multiplication wins! Will you be one of the lucky 5?



Awarded \$10,000, an all inclusive trip, and a MacBook Pro to our 1st, 2nd, & 3rd place prize winners in 5 of the 2020 RCBC tracks.



DISTINCT LEADERSHIP DEVELOPMENT

Providing meaningful opportunities for key individuals to venture outside the confines of the office provides an unmatched return on investment. When we help individuals flex their strengths and grow their skills it better equips them for their role. When we develop team members it creates a learning culture in the practice where every team member is motivated to learn new skills and acquire new knowledge. It develops a culture of leaders. Investing in a team member's professional development not only matters to the individual being developed but it affects the bottom line of the business. When team members are engaged and feel invested in, they subsequently become more productive, creating a competitive edge that's unrivaled.

EXTRAORDINARY INSTRUCTION

The SI Leadership Institute's unique programming is designed to impact critical components of practice growth to maximize profitability. Through our dynamic approach to learning, participants receive principle-based instruction with tangible strategies that can immediately be put into action. We recognize that highly engaged team members need opportunities for continuous learning in order to be adaptable and flexible for the practice to stay competitive and relevant. We look forward to partnering with you to take your practice and team to the next level.

The future starts here.

LI FACILITIES

Strategically located on the east coast in Atlanta, Georgia and the west coast in Phoenix, Arizona, The Leadership Institute's state of the art facilities offer a creative, easily accessible meeting space perfect for any professional event. Having hosted over 25,000 team members, these buildings provide the ultimate environment to network, connect and obtain the tools needed to make an impact in the practice. When you visit these facilities, you'll notice there's purpose and intention behind every detail of the building, from our private meeting spaces to our large group instruction rooms and even down to our cafe areas. We recognize that environment and setting matters and we strive to create an experience that's second to none.





ATLANTA

Fly in, fly out! Located directly by Hartsfield-Jackson Atlanta International Airport, The Leadership Institute's Center in Atlanta is second to none when it comes to convenience. Rooted in the belief that every workshop should generate its own creative and memorable experience, this cutting edge facility is fully equipped to handle the needs of any size group. We welcome you to venture outside the confines of the office and embark on a unique opportunity to work ON the practice verses in it.



PHOENIX

Looking for a retreat like experience? Our Phoenix Leadership Center provides a sunny, West Coast vibe with outdoor spaces that are sure to energize and inspire. Located in the heart of Downtown our Phoenix Leadership Center is the perfect place to gain new insights, connect with others and grow both professionally and personally. Get outside the day to day routine of the office and step into our modern, industrial facility to develop creative plans for positively impact in the practice.

CORE CONTENT CREATION AND WORKSHOP SPEAKERS

JAY GEIER

Founder, CEO of Scheduling Institute

Jay is an award-winning entrepreneur, international philanthropist, and Amazon Best-Selling author. He's the Founder and CEO of the world's largest and most successful Private Practice Consultancy - which was stemmed from his own success in marketing a Private Practice and setting a New Patient record of 605 in one week. Jay is a 18-TIME Townie Choice Award Winner, Podcast Host and #1 Advocate for the Independent Doctor. With more 25 years of history in the industry, he has a proven track record of turning practices into businesses, Doctors into CEOs and employees into high-performing individuals and teams.



HANNAH LYTLE

Leadership Institute Director

Having served as an on-site trainer for many years, Hannah has trained over 350 offices around the world, including Canada and Australia. In her current role as Director of the Leadership Institute her top priority is engineering impactful learning opportunities for team members. With specialized knowledge in strength-based coaching and content development, Hannah has instructed over 5,000 high-performing individuals in her tenure with the program.

APRIL SHARP

Executive Clinical Director

Content Specialist and Workshop Speaker

April Sharp serves as Executive Clinical Director at Scheduling Institute. She oversees all clinical programming including clinical on-site trainings, Hygiene Bootcamp & Advanced Bootcamp tools & strategies, and serves as co-lead for all clinical course content within the Leadership Institute. Having a wide range of experience in both clinical and marketing fields, April brings an innovative and creativity approach to practical growth-oriented solutions.





JACLYN SYKES DUNN

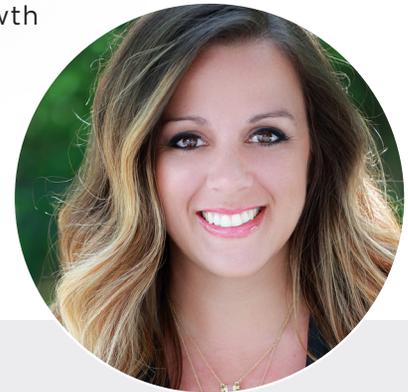
*Clinical Training Department Lead
Clinical Content Specialist*

Jaclyn is a Clinical Training Department Lead and Clinical Content Specialist. She is responsible for the on-going development of Clinical On-Site Trainers at Scheduling Institute and serves as the co-lead for all clinical course content within the Leadership Institute. She has a strong track record of helping new associate doctors successfully integrate into the practice and continues to coach clinical teams across all 50 states.

KERRI ANDERSON

Recruitment & Talent Development Specialist and Workshop Speaker

Kerri has over 12 years experience in the leadership & practice growth sector. She has served as head of training departments, overseen coaching program for doctors, and recruited talented team members to high performing organizations. On faculty at the Leadership Institute, Kerri instructs HR managers on current best practices in the areas of recruitment and talent development. She also serves as a leadership content specialist, providing effective strategies to build culture and drive performance.



FLINT GEIER

*5 Star Certification Program Owner
Front Desk Content Specialist and Workshop Speaker*

Flint is one of the industry's leading experts in new patient generation. Having over 20 years of exposure to the principles surrounding a practice's initial point of contact with patients, Flint provides a level of expertise that is unmatched. He currently coaches team members worldwide on the fundamental of increasing new patients through exceptional customer service. Flint's efforts to pair instruction with on-going accountability have empowered team members to achieve recording breaking numbers of new patients each month.



SEJLA BOJCIC

*Training Team Project Manager
New Hire Bootcamp Course Leader*

Sejla brings over a decade of experience in the field of talent development. As a former clinical instructor and practice growth specialist, Sejla understands to generate results it is vital to invest in the people that work within the practice. She has considerable experience teaching team members foundational principles that are key to an organization's success. Topics of expertise include new hire on-boarding, organizational alignment, impact, core values and goal setting.



SPEAKERS

**LANCE PANARELLO**

*CEO of Dental Health Care Associates
Platinum Coach*

Lance has been in dentistry for over 25 years. As the proud owner of the first “green” dental building, Dr. Panarello understands first-hand the necessary demands to evolve throughout a career. From taking over his father’s family practice in 1997, Lance has nearly quadruple the business, coaching many doctors and team members to success. In addition to his responsibilities as CEO of his family practice, Dr. Panarello also coaches owner doctors around the U.S. on the foundations of a thriving practice and how to be a more effective leader.

**BRANDON SMITH**

The Workplace Therapist, Author & Speaker

Brandon Smith is a leading expert in leadership communication and “curer” of workplace dysfunction. A sought-after keynote speaker and TEDx presenter, Brandon has delivered keynotes for numerous Fortune 100 companies and industry associations across the globe. A master “edutainer,” Brandon brings humor, insights, practical next steps and a large dose of inspiration to all of his audiences. He has presented to over 100,000 people in more than 1,000 presentations in the past decade.

**BILLY BOUGHEY**

*Founder & President of Elevate Experiences
Former Phillies Baseball Player*

Billy is a speaker, author of *Culture Reconstructed* and Founder & CEO of Elevate Experiences. His vision is to equip leaders and inspire others to use their full potential. His expertise is in helping organizations improve their culture, building strong teams, and creating raving customers. Topics include how to build a healthy culture, keys to dynamic collaboration, and creating remarkable guest experiences.



DEBRA NASH

Speaker, Trainer, Igniter

Debra Engelhardt-Nash is a trainer, author, and presenter. Having been in dentistry for over 30 years she has presented to organizations and study groups both nationally and internationally. Debra has written for several dental publications and has been honored twice as author of the year for her contributions to dental journals. She is a founding member and served three terms as President of the Academy of Dental Management Consultants. She is a board member of the American Academy of Dental Practice, an advisor for Dentistry Today magazine and serves on the Practice Management Advisory Board for the American Dental Association.



ASHELY FRANCIS

Entrepreneur, Owner of TURN Studio

Ashely started her own business 4 years ago and has given over 1000 talks to clients. She uses her personal experiences powered with her electric energy to create a shift in mindset, a punch in your gut, and a sense of urgency to start living your best life. She will guide you with encouragement, movement, and challenges to help you carve your path to being the best version of YOU!



BRITTANY SMITH

Relationship Manager & Clinical Specialist

Brittany's passion for people is what makes her an extraordinary instructor. She is dedicated to equipping both doctors and team member alike with tools to be successful. She has experience coaching both in small and large group settings. Having worked many years in private practice as a Dental Assistant, Brittany specializes in empowering assistants to recognize the significant impact they have on the growth of the practice.



RENE WILLIAMSON

Clinical On-Site Training Specialist

Renee is a powerhouse of knowledge. She has conducted over 900 on-site trainings with The Scheduling Institute. In addition to traveling on-site to coach doctors and clinical teams, Renee plays an integral role in developing content for Clinical On-Site Solutions at Scheduling Institute. Renee's expertise allows for her to push teams to achieve new heights while maintaining the balance between accountability and positivity.



VICKIE COLLIER

Clinical On-Site Training Specialist

A dynamic speaker, Vickie brings energy and life to every lesson taught. She has been a co-host of Scheduling Institute's Hygiene Profit Leaders podcast, a veteran faculty member of the University, beginning with the program's inception in 2011, and host of hygiene Q&A's and teleseminars. Her ability to translate evergreen principles into practical application is what has yielded results for team members time and time again.



DOUG LEGG

Clinical On-Site Training Specialist

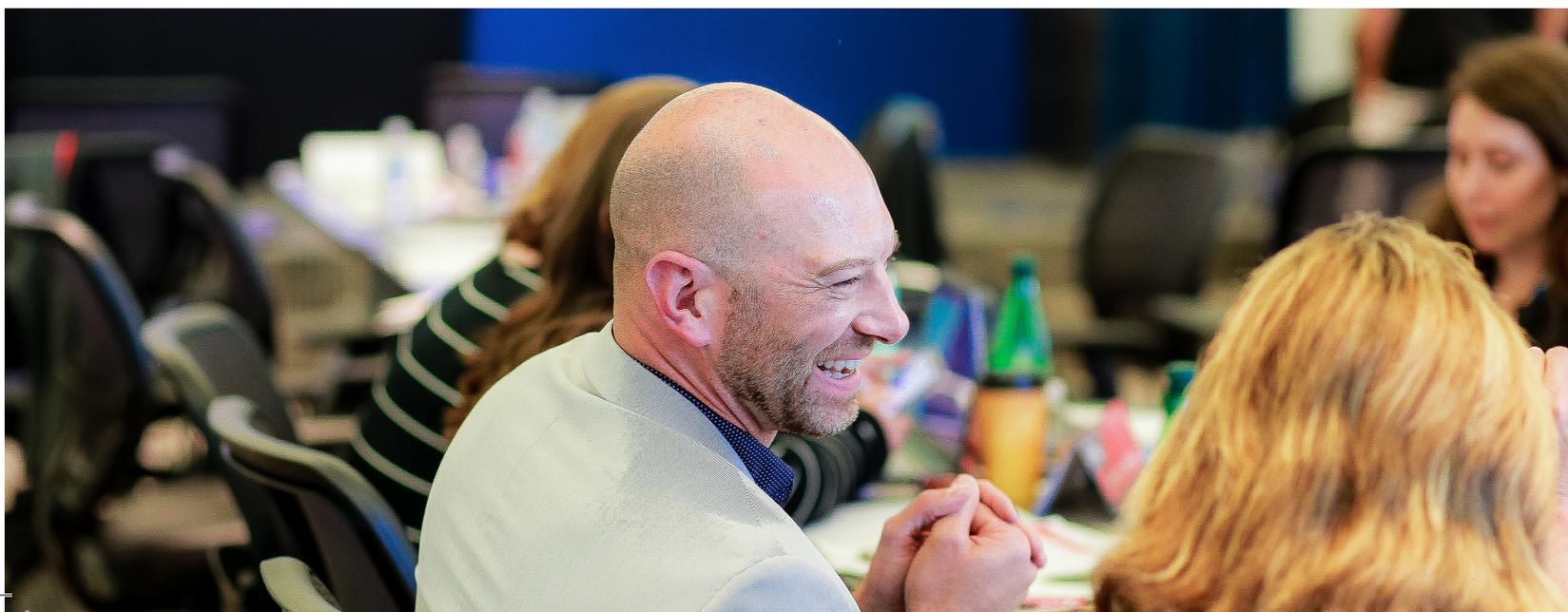
Doug is a certified On-Site Training Specialist and certified Kolbe Consultant. His passion for personal development and skill to provide tangible strategies to effect positive change are what keep team members highly engaged in the work they do. Having coached offices in a variety of allied healthcare fields in a range of geographic locations, Doug brings a unique perspective that empowers team members not to set self-imposed limits and adopt a "no excuses" mentality.



JACK BENTLEY

Clinical On-Site Training Specialist

Jack is a certified On-Site Training Specialist and alumnus of the Cardone University. Having been a part of collegiate & professional sports for many years, Jack understands the high-pressure stakes that are a part of achieving success. He brings that knowledge to the professional world and helps team members harness their own strengths to drive results and thrive in their individual roles within the practice.



EXPERIENCE AND COMMUNICATION TEAM



CAT LESTER

Communication & Utilization Manager

As one of The University's most tenured faculty members, Cat has been a part of the program since 2013. She has served in many capacities, facilitating workshops, coaching team member, program utilization and communication. Cat's large scope of expertise allows for her to work closely with practices to ensure they maximize their involvement with the Leadership Institute. As a member of the Scheduling Institute's Fun Bomb committee and recipient of the "Fun" Core Value Award, Cat injects a spirit of energy and enthusiasm within the learning environment.



CAITLIN BULLOCK

Event Experience Manager

Caitlin serves as Experience Manager for all Leadership Institute events. Her attention to detail ensures participants are equipped with the logistical materials they need to have an impactful experience at our leadership centers. Having planned and overseen events for a variety of demographics, Caitlin's versatility allows for her to incorporate an array of experiences that's sure to leave everyone excited for their next visit to The Leadership Institute.



STACY JOHNSON

Atlanta Leadership Center Building Manager

Stacey's servant mindset is what makes each experience at the Atlanta Leadership Center memorable. He has extensive experience with building management and is highly skilled at ensuring the physical environment of the event space is conducive for learning and connecting with others. Stacey is committed to creating a setting that is warm and welcoming for all who step foot in our leadership facilities.



MICHAEL AMELLA

Atlanta Leadership Center Building Officer

A vital component to the success of Leadership Institute events, Michael's expertise lies in event logistics and experience delivery. Whether it's providing support for one-on-one private planning days or 100+ person events, Michael is dedicated to making sure anyone who enters our leadership centers is armed with the physical materials they need to have a positive experience.

FEATURED COURSES

NEW DATES
JUST RELEASED!

ALL FEATURED COURSES ARE 1 DAY • 1 CREDIT

Disney

THE SECRETS TO DISNEY'S SUCCESS... AND YOURS

CULTIVATING EXTRAORDINARY
EXPERIENCES

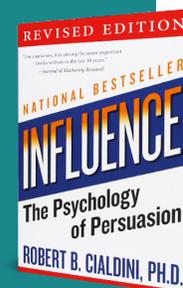
Spend a day unpacking the science behind creating memorable moments for all who come in contact with your practice. Drawing upon the experiences of iconic brands like Disney, this course will demonstrate how leaders and front line team members can drive engagement and ownership behaviors that ultimately produce transformational customer experiences. Unearth ways to keep your practice relevant to changing patient needs and shifting economic times.

Based off of Dr. Robert Cialdini's ground breaking book, Influence, this course will translate the scientific research into practical application. His wildly acclaimed studies are highly instructive to those who want to be more influential. Spend the day with The Leadership Institute identifying and explaining the six universal principles of persuasion that lead others to say yes.

Ensure correct and ethical use of these principles to produce lasting relationships and long-term change.

CIALDINI'S PRINCIPLES OF INFLUENCE

HOW TO MASTER
PERSUASION ACTION





KOLBE

NAME, CLAIM
AND AIM YOUR
NATURAL TALENTS
INTO ACTION

Change the way you work and learn how to identify what you do best. Grounded in the Kolbe System, participants will cultivate deeper self-awareness, maximize individual productivity, and develop more effective communication. Designed to take participants beyond a foundational awareness of their natural instincts and innate abilities, this course will help team members identify ways to intentionally invest in their distinctive talents and aim them into action.



EXACTLY WHAT TO SAY

THE MAGIC WORDS
FOR INFLUENCE
AND IMPACT

Quite often the difference between success and failure can be pinpointed to the compound impact of our conversations. Words matter and understanding how you use language to control a conversation is certain to provide you a fair advantage in your challenging marketplace. Join The Leadership Institute as we unpack the power language has over the subconscious brain while providing practical tools that can instantly be applied to the practice. Perfect for Providers looking to improve their treatment acceptance, Leaders looking to have more impact and Team Members with goal of having more influence in their daily conversations.

Everyday practices around the globe miss critical opportunities to connect in powerful and profitable ways because they lack a storytelling skillset. Until now. During this dynamic course, participants will understand the psychology behind strategic storytelling and how to take full advantage of it. With expert instruction participants will begin to access the unlimited supply of stories just waiting to be uncovered within the practice. This course will equip team members to build better relationships, drive new patients, increase treatment acceptance and establish career opportunities by leveraging the irresistible power of their stories.



STORIES THAT STICK

THE IRRESISTIBLE
POWER OF STRATEGIC
STORYTELLING

1.5-DAY EVENT SCHEDULE

DAY 1

- 10:00am..... Lounge Opens
- 1:30-2:30pm Registration
(Luggage storage available at LI Leadership facilities)
- 2:00pm..... Session Start Time
- 5:45-6:30pm..... Dinner *(Sit Down Dinner Provided)*
- 6:30-7:30pm..... Evening Session Time

Please note that dinner will be the only meal provided on Day 1. Breakfast and lunch are NOT included and will be up to the responsibility of the attendee.

DAY 2

- 8:00-8:30am Arrival Time & Check-In
(Continental Breakfast Provided)
- 8:30am..... Session Start Time *(Boxed Lunch Provided)*
- 3:30pm Session End Time

2-DAY EVENT SCHEDULE

DAY 1

- 8:00-8:30am Arrival & Registration *(Continental Breakfast Provided)*
- 9:00am Session Start Time *(Sit Down Lunch Provided)*
- 5:00pm..... Session End Time
- 5:00-6:00pm..... Evening Reception *(Beverages Only)*

DAY 2

- 8:00-8:30am Arrival Time & Check-In *(Continental Breakfast Provided)*
- 8:30am..... Session Start Time *(Boxed Lunch Provided)*
- 3:30pm Session End Time

2.5-DAY EVENT SCHEDULE

DAY 1

- 10:00am..... Lounge Opens
- 1:30-2:30pm Registration
(Luggage storage available at LI Leadership facilities)
- 2:00pm..... Session Start Time
- 5:45-6:30pm..... Dinner *(Sit Down Dinner Provided)*
- 6:30-7:30pm..... Evening Session Time

Please note that dinner will be the only meal provided on Day 1. Breakfast and lunch are NOT included and will be up to the responsibility of the attendee.

DAY 2

- 8:00-8:30am Arrival Time & Check-In *(Continental Breakfast Provided)*
- 9:00am Session Start Time *(Sit Down Lunch Provided)*
- 5:00pm..... Session End Time
- 5:00-6:00pm..... Evening Reception *(Beverages Only)*

DAY 3

- 8:00-8:30am Arrival Time & Check-In *(Continental Breakfast Provided)*
- 8:30am..... Session Start Time *(Boxed Lunch Provided)*
- 3:30pm Session End Time

2022 COURSE DESCRIPTIONS

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May 23-25 | ATL

Aug 9 | Virtual

Nov 2-4 | PHX

Jan 17 | Virtual

PRODUCING DOCTOR

Transform every doctor in your practice to be a successful, profitable and positive producer who can generate real results.

To influence, collaborate, educate or persuade, everyone is “selling” something yet so frequently the word “sales” is frowned upon when applied to the clinical setting. This program will take a deep dive into helping doctors recognize that sales isn’t about manipulation it’s about caring, something most doctors do instinctively. Learn techniques to activate growth in production numbers while also becoming a confident leader in the practice. Develop a comprehensive approach to what it means to contribute to the practice both with patients as well as team members. Adopt a mindset of interconnectivity throughout the entire team to produce at the highest level.



I have seen my skills grow, as well as my production has increased more than 3 times since I started. I look forward to the new adventure and am glad to participate in the Associate Bootcamp.

- PIPER LARSON, PREMIER DENTAL



KEY CONCEPTS ADDRESSED

- Relational vs Transactional Interactions
- Managing Your Physical Presence
- Seeing Through The Patient's Lense of Perspective: Recognizing & Understanding Patient's Values
- Importance of Keeping Score & Effective Goal Setting
- Increase Conversion & Compliance
- Increase Average Revenue per Patient
- Financial Stewardship



PROGRAM BENEFITS

By attending this program you will:

- Establish an effective plan to increase doctor production
- Analyze Procedure by Provider Reports
- Expand your presentation skills through personalized feedback and coaching
- Embody a patient-centric approach to case presentation



WHO SHOULD ATTEND?

Designed for any doctor in the practice looking to elevate their skillset. Ensure every doctor in the practice is given the opportunity to discover how they can optimize their personal performance as a team player and team leader. This course is ideal for doctors who have never been a part of an intensive professional development program.



PROGRAM FORMAT

2.5-day Workshop

Remote Learning Opportunities

1 Virtual Mastermind

Case Presentation Audit Review. Coaching feedback provided by Leadership Institute specialists & peers.



INVESTMENT

(6) Leadership Institute Credits



Oct 19-21 | PHX

CLINICAL TALENT DEVELOPMENT

Protect one of your greatest assets in the practice, your providers. Learn powerful tools to recruit, mentor, coach and retain providers in the practice.

Providers are one of the biggest assets within a practice however, in this ever-changing workforce loyalty and longevity within an organization can no longer be assumed. Practices must evolve with the changing tides. Join other successful companies by providing a compelling career path for those who possess the potential to bring in significant revenue into the practice. This program will teach you how to implement people-focused strategies to maximize results, promote consistent execution of systems & processes, and empower providers to contribute in meaningful ways to the practice.

(Providers in the practice may include but are not limited to, Associate Doctors, Hygienists, Nurse Practitioners, Behavior Analysts, etc.)



KEY CONCEPTS ADDRESSED

- Coaching & Mentorship Strategies
- Accountability
- Effective Communication
- Recruiting & On-Boarding Processes
- Talent Assessment Tools
- Performance Drivers
- Team Member Retention Strategies



PROGRAM BENEFITS

By attending this program you will:

- Facilitate methods for promoting excellent clinical performance and dealing with poor performance.
- Establish clear career paths that highlight a compelling future with the practice
- Develop a structured method for helping providers learn from their experiences and generate meaningful insights to produce results
- Deepen your knowledge by networking with other team members in similar roles.



WHO SHOULD ATTEND?

This program is an excellent fit for any team lead in charge of making sure you have and keep providers in the practice. Ensure the practice is equipped with team members engaged in high-payback activities that raise production. Practices with a designated Clinical Director role would greatly benefit from this program. Owner Doctors are approved to attend this course.



PROGRAM FORMAT

2.5-Day Workshop at Atlanta or Phoenix Leadership Centers



INVESTMENT

(4) Leadership Institute Credits



Jun 6-7 | PHX

Dec 8- 9 | ATL

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.

Well-designed collaboration powers value creation. In this course, office managers will learn techniques to build a network of social capital that drives performance and cultivates self-managing team members. Acquire tools to take on complex team challenges and promote innovative problem solving within the practice.



Our office manager Cheryl has started to implement many of the U's ideas and it has been neat to see how our office is changing and succeeding in a new direction! Hope to learn more at the U!!

- FATIMA ABEYTA





MANAGEMENT TEAM AND TEAM LEADERS



KEY CONCEPTS ADDRESSED

- Principles of Credibility: 5 Waves of Trust
- Areas of Culture
- Performance Coaching
- Strategic Innovation
- Project Management
- Conflict Resolution
- Effective Relational Communication



PROGRAM BENEFITS

By attending this program you will:

- Foster a culture of shared goals, interdependence and openness
- Create accountability throughout the organization
- Improve efficiency of systems & processes within the practice
- Give time back to doctors through executive delegation of practice growth initiatives



WHO SHOULD ATTEND?

This program is open to office managers of all experience levels. Practices looking to invest in a key player in the practice who is just as engaged in the growth and culture of the practice as the owner doctor would greatly benefit from this course. Equip your trusted team member with tangible strategies to unite the team and lead.



PROGRAM FORMAT

1.5-day Workshop at Atlanta or Phoenix Leadership Centers



INVESTMENT

(2) Leadership Institute Credits





Jul 11-13 | ATL

Oct 26 | Virtual

HR RECRUITING

Attract talented team members. Develop evergreen tools and a systematic process for recruiting all roles in the practice.

The world of recruiting is fast paced and rapidly changing. Learn how to hire top talent using time tested processes while keeping up to date with the latest techniques in the recruiting world today. Bring value to the practice by learning how to determine specific practice needs, how new capacities bring value to the business, and hiring the right person for the job. Don't wait for the perfect person to fall into your lap, go out and find them! We will be tracking our recruiting techniques to ensure success of integrating new team members into the practice.





KEY CONCEPTS ADDRESSED

- Recruitment Mindset - Law of Attraction
- Pre- Recruitment Process
- Step by Step Hiring Process
- Great Benefits to Attract Top Talent
- Recruitment Marketing
- Placing Good Ads
- Social Media Recruiting
- Sourcing Candidates
- Using Kolbe to Recruit
- Testing Potential Hires
- Group Hiring Days
- Who Should Be Hiring in the Practice



PROGRAM BENEFITS

By attending this program you will:

- Acquire New Technique for Hiring
- Develop a Documented Hiring Process
- Create an Offer Template
- Establish Tracking Tools & Measured Statistics for Success
- Generate New Written Referral Programs for Your Team
- Construct Interview Questions



WHO SHOULD ATTEND?

This program is an excellent fit for team members who are brand new to recruiting and hiring team members, all the way to the most seasoned recruiters. Leaders within the business looking to add new capacities to their business in any position will find this course beneficial. The doctor or business owner should not be performing the hiring process and therefore should not attend.



PROGRAM FORMAT

2.5-day Workshop at Atlanta or Phoenix Leadership Centers

Remote Learning Opportunities

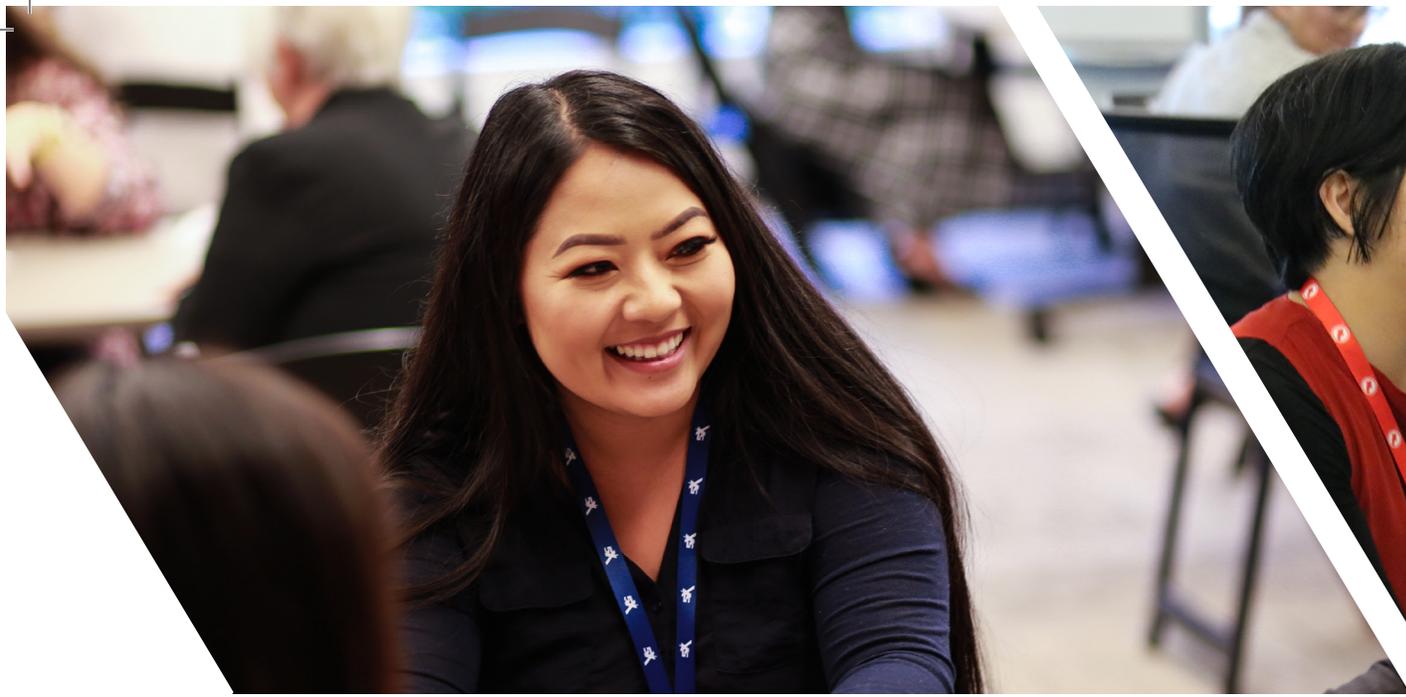
1 Virtual Mastermind

Group share of 90 day recruiting initiatives implemented following in-person workshop. Swipe book provided to participants who submit a share.



INVESTMENT

(6) Leadership Institute Credits



Jul 11-19 | ATL



Oct 12 | Virtual

CLINICAL TEAM LEADER

Drive doctor production, hygiene production, and practice revenue. Obtain strategies to effectively lead your team and grow your clinical department.

Become an effective leader who inspires a high performing team. Develop skills in providing structured feedback for effective and lasting improvements. Ensure the clinical areas of the practice are being developed in a way that is on target, fun, and most importantly achieves results.



Prior to the "U," we were good clinicians, but all in our own way. Since enrolling in the Scheduling Institute, we are now aware of best practices in our own office, and are able to help each other raise our standard of care, while also having access to what is working in other highly successful offices nation-wide!

- JAMIE FREITAG, ROBINSON DENTAL



MANAGEMENT TEAM AND TEAM LEADERS



KEY CONCEPTS ADDRESSED

- Key Performance Tracking
- Production by Procedure by Provider Analysis
- Same Day Treatment
- Buying Signals
- Case Presentation
- Adjunctive Services
- New Patient & Existing Patient Retention
- Open Time
- Revenue per Treatment Space & Unrealized Revenue



PROGRAM BENEFITS

By attending this program you will:

- Fine-tune production processes
- Acquire techniques to prioritize time to work ON the business not just IN it
- Develop coaching techniques to effectively motivate and empower team to hit goals and generate results
- Establish tools for accountability and performance evaluation



WHO SHOULD ATTEND?

This program is an excellent fit for both Hygiene and Assistant Team Leaders. Uniquely designed to bridge the gap between hygiene production, doctor production, and any other clinical offerings, this course is focused on promoting cohesion and continuity across all clinical aspects of the practice. Both hygienist and assistants alike will leave armed with the knowledge and tools to effectively grow clinical services within the business.



PROGRAM FORMAT

2-Day Workshop at Atlanta or Phoenix Leadership Centers

1 Virtual Mastermind

Group share of 90 day initiatives implemented following in-person workshop.

Swipe book provided to participants who submit a share.



INVESTMENT

(4) Leadership Institute Credits



Aug 15-16 | ATL

FRONT DESK TEAM LEADER

Keep the team focused on New Patient generation and bridge the gap between marketing efforts implemented and patients coming into the practice. Solidify the initial point of contact while protecting the patient experience.

The central goal of the Front Desk is to provide potential, new and existing patients with outstanding customer service & support. But it doesn't stop there. Learn techniques to expand the capacities of the Front Desk team and develop them into revenue producers and new patient generators. Empower them to go beyond the 5 Star Call and truly level up your New Patient game.



Our front office staff attended the U Institute and came back filled with positive energy. We have started morning meetings which have helped with planning. The stress level in the office has gone down and our relationships have become stronger. I can not wait to attend in September!

-VICTORIA HAWKINS, DR. JUSTIN SCOTT



KEY CONCEPTS ADDRESSED

- Importance of Continual Incremental Growth
- On-Boarding & Training of the Front Desk Team
- Goal Setting & Tracking
- Leadership & Self Deception
- Principles of Influence
- 5 Star Customer Service: Create Super Fan Patients Who Pay, Stay & Refer



PROGRAM BENEFITS

By attending this program you will:

- Increase personal engagement and ownership around the Patient Funnel.
- Discover specific areas to maximize not only your personal productivity but create a ripple effect within your team.
- Learn how to maximize the 5-Star Certification Program and/or Call Tracker in your office.
- Deploy your presentation skills in a risk-free environment, with personalized feedback and coaching.
- Deepen your knowledge by continuing the learning experience through remote content.



WHO SHOULD ATTEND?

This program is an excellent fit for an established team lead, or seasoned front desk team member with potential for higher responsibility. Attendees should not be a new hire or test subject.



PROGRAM FORMAT

2-day Workshop at Atlanta or Phoenix Leadership Centers
Remote Learning Opportunities



INVESTMENT

(4) Leadership Institute Credit



Apr 25-26 | ATL

Aug 22-23 | PHX

FRONT DESK TEAM MEMBER

Elevate the skills of the top talent within your Front Desk Team. Develop individuals to drive new patients and embody a leadership mindset without having to have the title.

Capable, ambitious team members want training, mentoring and coaching. They want to gain skills and become more valuable to the organization. Provide talented Front Desk team members the opportunity to sharpen their strengths and take greater responsibility and ownership of their craft.



"I just attended the Front desk "U" 101. I learned so much information, I cant wait to start utilizing it in our office!"
- ASHLEY WARREN, WORTHINGTON DENTAL GROUP





INCREASE PRODUCTIVITY AND DEVELOP TEAM MEMBERS



KEY CONCEPTS ADDRESSED

- Pyramid of Success
- Growth vs Fixed Mindset
- Value of a New Patient
- Interconnectivity
- Advanced Communication Techniques



PROGRAM BENEFITS

By attending this program you will:

- Increase personal engagement and ownership around growing New Patients
- Become rooted in tried-and-true principles that will unlock new capacities for individuals to live up to their true potential.
- Learn how to personally leverage the 5-Star Certification Program in your office.
- Deploy your presentation skills in a risk-free environment, with personalized feedback and coaching.
- Deepen your knowledge by networking with other team members in your role.



WHO SHOULD ATTEND?

This program is an excellent fit for any front desk team member exhibiting initiative and open mindedness.



PROGRAM FORMAT

1.5-day Workshop at Atlanta or Phoenix Leadership Centers



INVESTMENT

(1) Leadership Institute Credit





May 5-6 | ATL

Sep 12-13 | PHX

ASSISTANT TEAM MEMBER

Elevate the skills of the top talent within your Assistant Team. Develop individuals to drive doctor production and embody a leadership mindset without having to have the title.

Capable, ambitious team members want training, mentoring and coaching. They want to gain skills and become more valuable to the organization. Provide talented Assistants the opportunity to sharpen their strengths and take greater responsibility and ownership of their craft.



Thank you so much to the scheduling institute for the amazing experience myself and my colleagues received when we attended the assistant U workshop in Atlanta. Angie was motivational, knowledgeable and really inspired us to take everything we learnt that day and implement this into our dental office when we got home. It was definitely worth the trip all the way from England!!! Not only did this workshop exceed our expectations, everybody we met was so very helpful and accommodating.

- ASHLEY COX, DR. NEIL GERRARD

INCREASE PRODUCTIVITY AND DEVELOP TEAM MEMBERS



KEY CONCEPTS ADDRESSED

- Pyramid of Success
- Growth vs Fixed Mindset
- Interconnectivity
- Becoming Proactive: Anticipating the Needs of the Doctor
- Advanced Communication Techniques



PROGRAM BENEFITS

By attending this program you will:

- Increase personal engagement and ownership around driving doctor production.
- Become rooted in tried-and-true principles that will unlock new capacities for individuals to live up to their true potential.
- Learn strategies to increase doctor hourly production.
- Deploy your presentation skills in a risk-free environment, with personalized feedback and coaching.
- Deepen your knowledge by networking with other team members in your role.



WHO SHOULD ATTEND?

This program is an excellent fit for any assistant team member exhibiting initiative and open mindedness.



PROGRAM FORMAT

1.5-day Workshop at Atlanta or Phoenix Leadership Centers



INVESTMENT

(1) Leadership Institute Credit



May 16-17 | PHX

Sep 22-23 | ATL

HYGIENE TEAM MEMBER

Elevate the skills of the top talent within your Hygiene Team. Develop individuals to drive hygiene production and embody a leadership mindset without having to have the title.

Capable, ambitious team members want training, mentoring and coaching. They want to gain skills and become more valuable to the organization. Provide talented Hygienists the opportunity to sharpen their strengths and take greater responsibility and ownership of their craft.



The Hygiene “U” was a blast!!! Informative and energetic. When it’s over... You leave eager and ready to take on any challenge to get you to improve and simply be your best all around.

- DANIELA JOYCE



INCREASE PRODUCTIVITY AND DEVELOP TEAM MEMBERS



KEY CONCEPTS ADDRESSED

- Pyramid of Success
- Growth vs Fixed Mindset
- Interconnectivity
- Case Presentation
- Advanced Communication Techniques



PROGRAM BENEFITS

By attending this program you will:

- Increase personal engagement and ownership around driving hygiene production.
- Become rooted in tried-and-true principles that will unlock new capacities for individuals to live up to their true potential.
- Learn strategies to increase adjunctive services
- Deploy your presentation skills in a risk-free environment, with personalized feedback and coaching.
- Deepen your knowledge by networking with other team members in your role.



WHO SHOULD ATTEND?

This program is an excellent fit for any assistant team member exhibiting initiative and open mindedness.



PROGRAM FORMAT

1.5-day Workshop at Atlanta or Phoenix Leadership Centers



INVESTMENT

(1) Leadership Institute Credit



Jul 21-22 | ATL

Nov 8 | Virtual

MARKETING DIRECTOR

Increase new patients in the practice by taking ownership of this area and creating a powerhouse marketing system. Develop effective communications techniques, tracking tools and methods for increased visibility. Drive new patients through the creation of a profitable marketing plan.

Discover the impact a strategic approach can have on marketing within your practice. This course will equip your Marketing Director with the tools to successfully engage both prospective and existing patients alike. Participants will immerse themselves in the framework of marketing strategy, unpack the nuances of the evolving digital world, and develop a comprehensive view of campaign management and optimization.



KEY CONCEPTS ADDRESSED

- Ownership of New Patients
- Goal Setting & Tracking
- List Segmentation
- Profitable Marketing Communications
- Referral Contests
- Campaign Building
- Storytelling
- Integration of Marketing Initiatives Across All Areas of the Practice



PROGRAM BENEFITS

By attending this program you will:

- Create a strategic plan to drive new patients and create loyal, super-fan patients.
- Expand your marketing skillset through personalized coaching and feedback
- Learn from other companies using innovative marketing strategies to inform their market and become more efficient.
- Go beyond traditional marketing tactics and understand the digital world patients inhabit



WHO SHOULD ATTEND?

Designed to provide practical strategies This program is an excellent fit for Marketing Directors or team members responsible for attracting and retaining patients within the practice.



PROGRAM FORMAT

1.5-day Workshop at Atlanta or Phoenix Leadership Centers

1 Virtual Mastermind

Marketing piece review. Coaching feedback provided by Leadership Institute specialists & peers. Swipe book provided to participants who submit a share.



INVESTMENT

(2) Leadership Institute Credits



Aug 25-26 | PHX

Nov 16 | Virtual

FINANCIAL TREATMENT COORDINATOR

Learn the foundations of effective patient communication, improve the quality of financial presentations, and increase case acceptance.

Look and feel confident as you propel patients to accept the treatment they need and want. Through this intensive course, participants will develop a deep understanding of how to execute effective financial presentation by being relational vs transactional. Improve all aspects of communication from how you prepare, your words, your ability to connect with patients, the structure of your presentation and as well as your supporting documents. Learn to recognize a patient's unmet needs, provide meaningful solutions and create loyalty with both new and existing patients.



KEY CONCEPTS ADDRESSED

- Relational vs Transactional Interactions
- Managing Your Physical Presence
- Seeing Through The Patient's Lense of Perspective: Recognizing & Understanding Patient's Values
- Crafting Your Personal Introduction
- Buying Signals
- Avoid Common Mistakes in Presentations
- Overcoming objections
- Creative Payment Options



PROGRAM BENEFITS

By attending this program you will:

- Unwrap unproductive beliefs around money
- Develop a Strategic Financial Presentation Process
- Create Effective Collateral to Support Treatment Acceptance
- Establish Tracking Tools to Measure Progress
- Participate in Presentation Skills Lab



WHO SHOULD ATTEND?

This program benefits any team member who presents financial treatment plans or frequently engages in financial conversations with patients. Excellent for both team members who are brand new to the financial presentation process as well as those who are seasoned veterans. If you are looking to increase case acceptance and advance the communication skills of your team member(s), this course is perfect for you.



PROGRAM FORMAT

2-day Workshop at Atlanta or Phoenix Leadership Centers

1 Virtual Mastermind

Financial presentation audit review and evaluation of presentation materials.

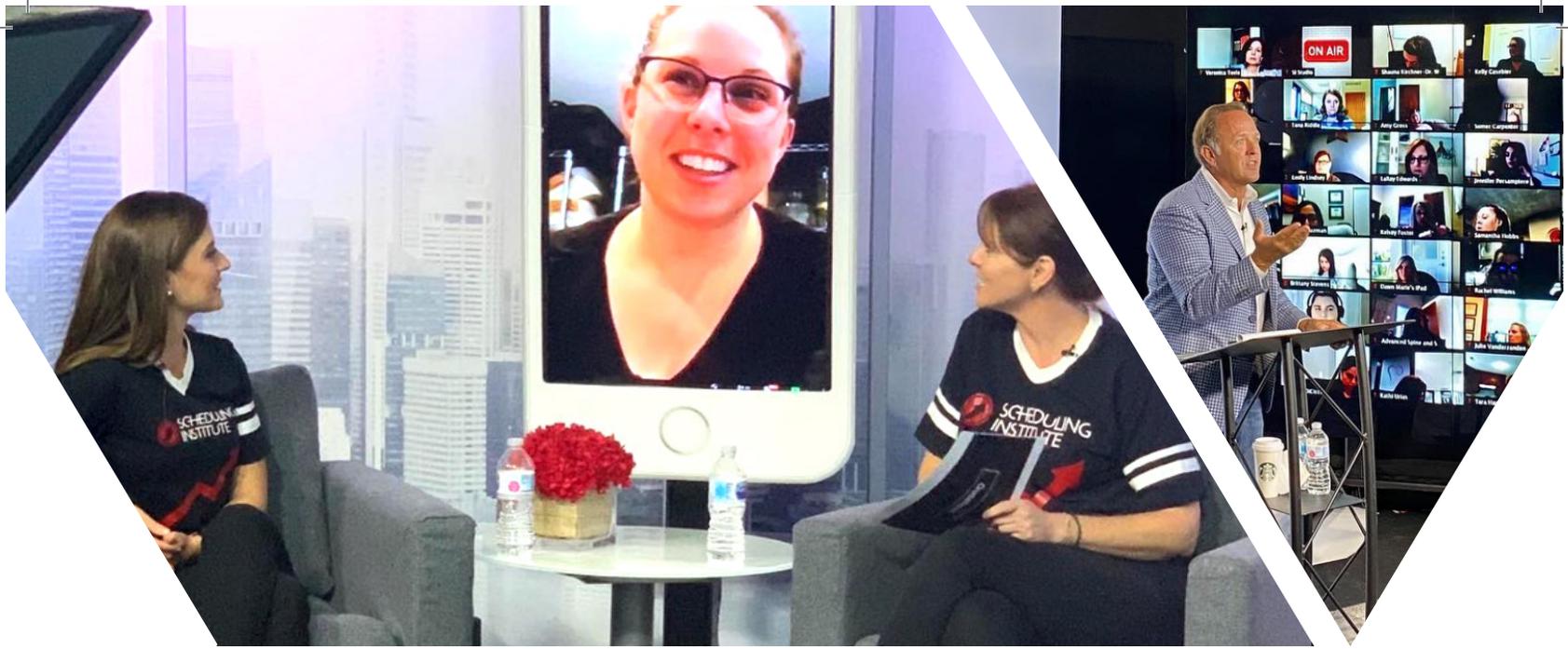
Coaching feedback provided by Leadership Institute specialists & peers.

Swipe book provided to participants who submit presentation materials.



INVESTMENT

(4) Leadership Institute Credits



Feb 2-4 | Virtual

Apr 4-6 | Virtual

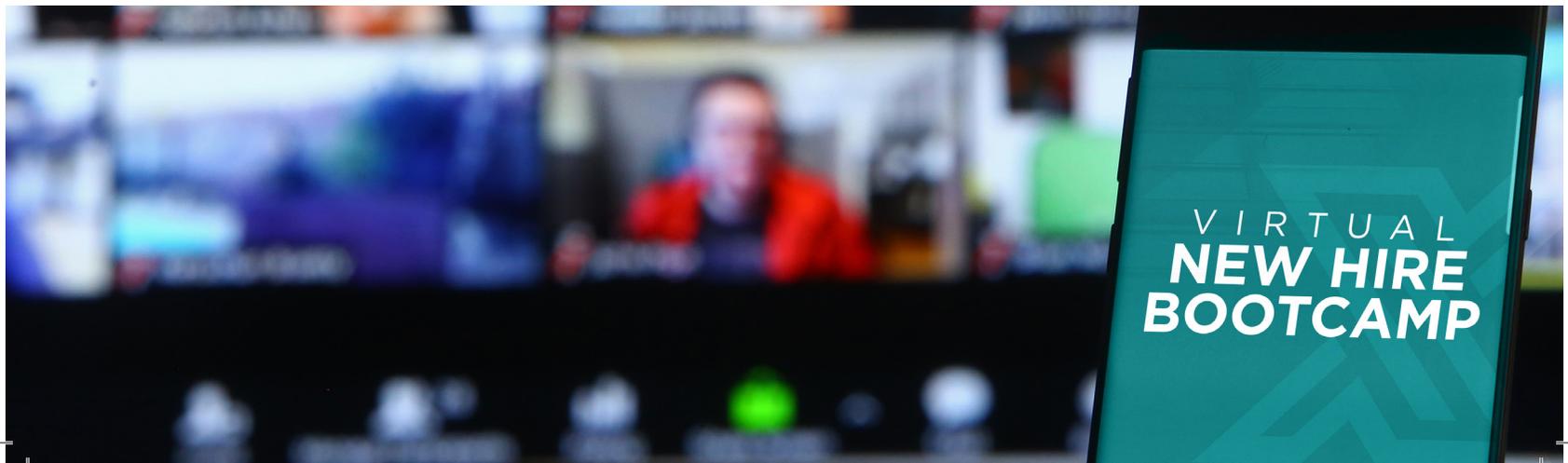
Jun 22-24 | Virtual

Oct 3-5 | Virtual

VIRTUAL NEW HIRE BOOTCAMP

Improve the performance of new team members. Provide immediate integration into a high performing, growth minded culture.

Indoctrinate your newest team members into your results-oriented environment. New Hires will join our Leadership Institute team of specialists to unpack the fundamentals of goal setting, the value of new patients, being coachable, the bubble, impact diagram and more. Setup your newest team members for success so they can hit the ground running and productively contribute to the practice.



VIRTUAL
NEW HIRE
BOOTCAMP



KEY CONCEPTS ADDRESSED

- Value of a New Patient
- Stewarding over Practice Assets
- The Bubble
- Being Coachable
- Importance of Goal Setting
- Impact Diagram
- Everyone is a Producer: Spreading the Message of the Practice Inside & Outside of the Office
- The Big 5



PROGRAM BENEFITS

By attending this program you will:

- Improve performance & foster immediate integration into the practice culture.
- Obtain role clarity
- Create an integration plan with other departments and teams within the practice
- Establish individual goals and tracking tools to measure progress.



WHO SHOULD ATTEND?

This program is designed for the newest team members of the practice. Created to be a component of the practice's individual on-boarding process, this program is ideal for any team member hired within the last 90 days or team members who have never attended a Scheduling Institute on-site training.



PROGRAM FORMAT

3-day Virtual Workshop (4hrs each day)



INVESTMENT

(1) Leadership Institute Credit

We are closely monitoring safety and travel guidelines provided by the CDC. In-person programming will adhere to SI Leadership Institute's safety guidelines which will be provided in your pre-event communication planner and is available on your membersite.

FORMAT:

Unless noted otherwise, ALL in-person events will be hosted at our Atlanta or Phoenix Leadership Facilities. No virtual viewing options will be provided for any in-person events. Virtual programming components are limited to the following: Remote Learning Opportunities, Mastermind Sessions, and The Virtual New Hire Bootcamp.

ACCOMMODATIONS:

Our Leadership Centers are conveniently located within walking distance of several hotels. A corporate rate is available for select hotels. Flight discount codes are also available for Delta & United airlines. This information will be provided within all pre-event planning communications and is available on your membersite. Accommodations are NOT included in the investment of course credits.

CREDITS:

Courses are assigned a designated credit amount based on the length of the course and course content. Credit investments listed in this catalog are subject to change and payable in advance. Credits must be utilized within a 24 month period, starting from the date of purchase. Credits may not be used towards other products or services outside of the SI Leadership Institute. Program costs include course tuition, instructional materials, continental breakfast, boxed lunch, coffee breaks, and one sit-down meal.

CANCELLATIONS AND TRANSFERS:

Cancellation of course credits is strictly prohibited. Requests to transfer credits from one course to another must be submitted in writing to the Leadership Institute, and will be handled on a case by case basis. Transfer requests must be submitted 30 days prior to the course date. No changes to course credit allocation will be allowed within 30 days or less of a course date.

SI Leadership Institute reserves the right to limit enrollment or cancel a course regardless of course registration status. In the unlikely event of a course cancellation, course credits will be made available to be applied towards another course. SI Leadership Institute is not responsible for any travel, hotel or other related expenses accrued by the practice/course registrant.

PHOTO & VIDEO RIGHTS:

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SI Leadership Institute reserves the right to change without notice any statement in this catalog concerning but not limited to course offerings, curricula, faculty, course credits, fees, policies, and rules. If course or curriculum changes take place after investing in Leadership Institute credits, we will make every effort to implement the changes in your best interest.







GREAT LEADERS
DON'T SET OUT TO BE A
LEADER... THEY SET OUT
TO MAKE A DIFFERENCE.

IT'S NEVER ABOUT THE ROLE
- ALWAYS ABOUT THE GOAL.



WANT TO INCREASE YOUR INDIVIDUAL TEAM MEMBERS STATISTICS BY 10-30% THIS YEAR?

ENROLL YOUR
TEAM TODAY, CALL
(833) 331-0157
TO SPEAK WITH
AN ADVISOR

Or schedule a complimentary, 45-Minute
Talent Development Zoom Call at
www.SiLeadershipInstitute.com
where we will evaluate your growth
opportunity by team member, map out
your talent pipeline and team coaching
plan for the year.

SI LEADERSHIP INSTITUTE | 2022 PROGRA

COURSE OR FOCUS	JAN	FEB	MAR	APR	MAY
DOCTORS / PROVIDERS					
FINANCIAL FREEDOM SUMMIT					
PRODUCING DOCTORS					23-25 ATLANTA
CLINICAL TALENT DEVELOPMENT					
MANAGEMENT TEAM / TEAM LEADERS					
OFFICE MANAGER					
HUMAN RESOURCES					
CLINICAL TEAM LEADER					
FRONT DESK TEAM LEADER					
INCREASE PRODUCTIVITY AND DEVELOP TEAM MEMBERS					
FRONT DESK TEAM MEMBER				25-26 ATLANTA	
ASSISTANT TEAM MEMBER					5-6 ATLANTA
HYGIENE TEAM MEMBER					16-17 PHOENIX
MARKETING TEAM MEMBER					
FINANCIAL TREATMENT COORDINATOR					
NEW HIRES					
VIRTUAL NEW HIRE BOOTCAMP		2-4 VIRTUAL		4-6 VIRTUAL	
FEATURED COURSES					
CIALDINI'S PRINCIPLES OF INFLUENCE: How to Master Persuasion Action					
THE SECRETS TO DISNEY'S SUCCESS... AND YOURS: Cultivating Extraordinary Experiences					
STORIES THAT STICK: The Irresistible Power of Strategic Storytelling					
EXACTLY WHAT TO SAY: The Magic Words for Influence & Impact					
KOLBE: Name, Claim, and Aim Your Natural Talent into Action					
VIRTUAL ENROLLMENT TELESEMINARS					
Member benefit to anyone with Leadership Institute course credits					MAY 26 Virtual 1-2PM EST

AM CALENDAR

LAST UPDATED 05/04/2022

JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN 2023	FEB 2023	MAR 2023
					10-12 DESTIN, FL				
		AUG 9 Virtual Mastermind			2-4 PHOENIX		JAN 17 Virtual Mastermind		
				19-21 PHOENIX					
6-7 PHOENIX						8-9 ATLANTA			
	11-13 ATLANTA			OCT 26 Virtual Mastermind					
	18-19 ATLANTA			OCT 12 Virtual Mastermind					
		15-16 ATLANTA							
		22-23 PHOENIX							
			12-13 PHOENIX						
			22-23 ATLANTA						
	21-22 ATLANTA				NOV 8 Virtual Mastermind				
		25-26 PHOENIX			NOV 16 Virtual Mastermind				
22-24 VIRTUAL				3-5 VIRTUAL					
				28 PHOENIX					
		12 PHOENIX							
			30 ATLANTA						
				14 PHOENIX					
							20 ATLANTA		
JUN 30 Virtual 1-2PM EST	JUL 28 Virtual 1-2PM EST	AUG 25 Virtual 1-2PM EST	SEP 29 Virtual 1-2PM EST	OCT 27 Virtual 1-2PM EST	NOV 17 Virtual 1-2PM EST	DEC 29 Virtual 1-2PM EST			



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