

Creating a Blueprint to Achieve Total Professional Success

This course is no longer offered for Continuing Education credit.

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Intended Audience: Dentists, Dental Hygienists, Dental Assistants, Office Managers, Dental Students, Dental Hygiene Students, Dental Assistant Students

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Disclaimer: Participants must always be aware of the hazards of using limited knowledge in integrating new techniques or procedures into their practice. Only sound evidence-based dentistry should be used in patient therapy.

Introduction

Whether starting a career or in practice for 20 years, it is important individuals create a process or “blueprint” that clarifies goals and provides a method to achieve them.

Conflict of Interest Disclosure Statement

- Dr. Schwartz was a member of the dentalcare.com Advisory Board.

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Overview

Over 2000 years ago, Aristotle, the Greek philosopher, wrote "All men seek one goal: success or happiness. First have a definite, clear, practical ideal – a goal an objective. Second have the necessary means to achieve your ends – wisdom, money materials and methods. Third, adjust all your means to that end".

Whether starting a career or in practice for 20 years, it is important individuals create a process or "blueprint" that clarifies goals and provides a method to achieve them.

Learning Objectives

Upon completion of this course, the dental professional should be able to:

- Define their vision of success.
- Identify values and emotional needs that support their goals.
- Visualize and validate positive goals.
- Realize advantages and obstacles to achieving goals.
- Establish timetables for achieving goals.
- Define strategies to achieve goals.
- Monitor progress.

Discovering the Secret to Success

In 1974 I graduated from dental school knowing just enough dentistry to get me and my patient in trouble if I did anything more complex than a filling. I knew absolutely nothing about life outside of dentistry because I spent the last eight years of my life concentrating on either gaining admission to dental school or graduating from it. Creating and living a successful personal life and professional career were foreign subjects.

I entered my residency program with the intention of refining my clinical skills. Luckily my teachers had greater plans for me. Not only had these faculty established successful dental practices, but used the rewards of their profitable practices to enrich their personal lives. Fortunately for me, they were willing to not only share their clinical knowledge but also the secrets to their success.

Their advice is very simple...

"The secret to success is to study and copy success."

It was as simple as that. Study successful people and copy them. You don't need degrees in psychology, business or theology. There was no need to beat your head trying to discover the secret of success when there were others who already did that. There was no need to reinvent the wheel if the wheel was already invented.

All that is needed to build a wheel is take the basic form and shape that others successfully

used for centuries, make minor changes to meet specific needs and use it. What do all wheels have in common? They are round. Square or triangular wheels never caught on. But all wheels are round. Some wheels are big. Some are small. Some are made out of steel, wood or rubber. But they all have one thing in common. They are round.

The same is true of success. Successful people share similar traits and philosophies. They just put their own little twist on them to achieve success.

They may have different goals or dreams. They may come from different religious or ethnic backgrounds. They may differ in their level of education and financial resources. However, they all share some specific traits and follow common steps to achieve success. They use the same basic techniques but adapt them to fulfill their specific dreams and goals.

Where do you find successful people to emulate? You can start by reading biographies of people you feel achieved success. Speak to successful individuals in your social and professional circle: physicians, dentists, teachers, storeowners, restaurant owners, etc.

Success Defined

Before starting on a journey for success it is necessary to define it. Success can be defined in many ways, subjectively and objectively. For some it's the attainment of wealth. For some it's the achievement of a goal. For some it's discovering happiness or love. The following quotes illustrate the array of success definitions.

- **“Success -The attainment of wealth, favor, or eminence.”** -Webster’s Dictionary
Webster’s Dictionary’s definition is the most common view of success. It conjures up visions of people whose faces appear on our newspapers’ front pages and televisions on a daily basis; heads of nations, religious leaders, CEO’s of major corporations, sport figures, movie stars. We take notice of these renowned figures because they took a dream and achieved it to a degree where they are at the pinnacle of their career. If you take the time to read their biographies, you see they all share similar characteristics.

- **“The real measure of success is how happy you are. I have a lot of friends who don’t have a lot of money, but they are a lot happier than I am, so I say they are probably more successful.”** -Donald Trump (1990)

Wealth does not necessarily lead to happiness. Charles Schwab, president of the largest independent steel company, died broke. Howard Hughes, movie producer and millionaire died alone as a hermit. We read and hear stories about movie celebrities, sports figures and heads of major corporations who commit suicide or ruin their careers and lives using drugs. Money does not necessarily lead to happiness.

- **“I’ve always told people to be successful you have to enjoy what you’re doing and right now I really enjoy what I’m doing.”** -Donald Trump (2001)

What a difference a decade can make. It’s known Donald Trump enjoys notoriety more than money whether it’s starring in a TV show or running for political office. Maybe that’s because he was born into money so it was always there. He had to work to gain fame.

- **“A man is a success if he gets up in the morning and gets to bed at night and in between does what he wants to do.”**

-Bob Dylan

If you hate what you’re doing, even if you’re earning gobs of money, why do it. If you spend your day looking at the clock, counting the minutes until quitting time can you ever be happy? If you’re just starting a career, with 35 years until retirement, and hate what you’re doing, you may not live a long life but it will certainly feel that way. Many people never achieved success because they didn’t give themselves the chance to follow their dreams. Either due to financial necessity, family pressures or timely opportunity, they chose careers that looked financially rewarding or prestigious. Now, they are serving a life sentence. The good news is that it’s always possible to get early parole.

- **“Success is being able to come home, lay your head on the pillow and sleep in peace.”**

-Herschel Walker

Some careers or jobs require people to do things that conflict with their values. The result is coming home only to relive their conflicts in bed. Therefore, an integral step

to achieve success is to identify one's values and determine if they are in harmony with one's goals.

- ***“Those who achieve success are those who take a dream and make it come true.”***

-Dale Carnegie

Whether you have simple or grandiose dreams and goals, seeing them to fruition in a timely manner makes you a success. Acceptance to and graduating from dental school qualifies as a success in the same manner as election to a high political office or building a major corporation.¹

Total Success Defined

As the title indicates, the objective of this course is to provide a means to achieve **Total Success**. Total Success means achieving equal success in all areas of your life. Achieving success in one area of your life (financial success) at the expense of another (emotional success) is not Total Success. It is achieving success in three areas or cornerstones in both your personal and professional lives. They are:

- **Financial Success** – Accumulate sufficient wealth to allow you the independence to do the things you really want to do.
- **Physical Success** – Have the physical ability to enjoy your financial success.
- **Emotional Success** – Eliminate the things in your life that drive you nuts and intensify the things that make you feel great.

To achieve Total Success, these three cornerstones of success must be satisfied to the extent they are in balance with each other personally and professionally. It's like a table. If all the legs are equal in length and the floor is level the table is stable. If one leg is shorter than the others and the floor isn't level the table is unstable and wobbles. The table can look magnificent, made of the most expensive wood, with intricate carvings, but until all the legs are in balance to each other the table is unusable. The same is true of life. Until the three cornerstones of success are in balance with each other your Total Success cannot be achieved.

A second concept of Total Success encompasses the 80/20 rule or Pareto's principle. Vilfredo Pareto (1848-1923), an Italian economist, observed in 1906, that 20% of the Italian people

owned 80% of the country's wealth. This “80/20 rule” or “Pareto's principal” has been expanded to state 80% of a person's results are generated by 20% of a person's effort.

Some examples of Pareto's principle are:

- 80% of an employer's personnel problems come from the same 20% of employees.
- 80% of a problem can be resolved by identifying the correct 20% of issues.
- 80% of customer (patient) complaints are about the same 20% of products (treatment) or quality of service.

As it relates to our personal and professional lives, Pareto's principle would be:

“80% of our business problems are caused by 20% of our personal problems; and 80% of our personal problems are caused by 20% of our business problems.”

Thus, to achieve Total Success it is necessary to find balance between our personal and professional lives. Building a successful practice should not come at the expense of a fulfilling personal life. You need to find balance between your business and personal life.²

Traits Necessary for Success

Success is not limited to the wealthy and smart. The vast majority of successful people started from the most humble of beginnings. Thomas J. Stanley, Ph.D. writes in *“The Millionaire Mind”* that 61% of all millionaires never received any inheritance, financial gifts or income from an estate or trust. He also found an extremely low correlation between grade point average in college and financial success. Coming from a poor family or not being the brightest in your class is not an excuse for not achieving success in your life.³ Successful individuals share characteristics and traits enabling them to achieving success. They are:

Passion

Successful people are passionate about their goals. They obsess about their goals, day and night. They focus all their energies on achieving their goals.

Think about the first time you fell in love. You couldn't think about anything else but that person with whom you were infatuated. Everything you did was to win your heart throbs adoration. Just thinking about this person made your heart race. That's how you must feel about your goal. You must have a passion for what you want. You must love and continue to love what you do. You must focus all your energies toward achieving your goals. You must have the willpower to overcome any obstacles that may cross your path.

Belief

Successful people believe in themselves. They have complete confidence they can achieve their wildest dreams. They know even though they are not the best in their class in school or are not great scholars they have the ability to succeed. They have the ability to ignore the naysayers, whether they are parents, coworkers, jealous friends or other dental practitioners in the community. To quote Dr. Seuss in *Oh, the Places You'll Go*:

***"You have brains in your head.
You have feet in your shoes.
You can steer yourself
Any direction you choose."***

Fearlessness of Failure

Successful people are not afraid of failure. They view failure as a learning experience. Henry Ford wrote, *"Failure is only the opportunity to more intelligently begin again."* Theodore Roosevelt wrote, *"It's hard to fail, but it is worse never to have tried to succeed."*

The rate of failure among restaurants is phenomenal. Yet if every restaurant owner was afraid of failing we would never have the experience of eating a fine meal prepared by a great chef. The greatest baseball players fail to connect with the baseball two out of three times at bat. If they feared failing, we wouldn't have baseball as our national pastime.⁵

Persistence

Successful people have the ability to overcome every obstacle thrown in their path. Some obstacles may be more difficult to overcome than others, but if people persist they can

succeed. Obstacles to their success motivate them to work harder to reach their goal. If and when they fail, they pick themselves up and continue to advance toward their goal. They know, when struck down with failure time after time, they have the ability to get up, dust themselves off and try again.

Did you know?...

- Stephen King had his first manuscript rejected 38 times before receiving acceptance for publication.
- Jack Canfield and Mark Victor Hansen went to over 100 publishers before *"Chicken Soup for the Soul"* was accepted for publication.
- Thomas Edison went through over 1000 prototypes before successfully inventing the light bulb.

Clarity of Values

Successful people have a clear understanding of who they are and what is really important to them. They can distinguish between an inconvenience and a real problem and react to each in an appropriate manner. They know what make them tick...their needs, their values. They are aware of what makes them happy, sad, angry or pleased.

Communication Skills

Successful people have the ability to effectively communicate their dreams, goals and desires. At the same time, they have the ability and desire to listen to others. Not just hear words but to internalize what is said and empathize with the other person. They actively listen to what others say to them, not just hear them. They make the effort to comprehend and fully understand what others are trying to communicate to them. They discovered the more they listen, the more they learn and are better able to respond to others.

Enjoyment

Successful people have the time of their life pursuing their personal and professional goals. They find ways to have fun while doing even the most menial tasks. They love their work and they enjoy their time at home with their family. Successful people enjoy themselves because they pick goals and careers that, if successful, satisfy their financial, physical and emotional needs.

A Strong Support Group

Successful people understand they have limitations and can't know everything about everything. That's why heads of successful companies have boards of directors and hire consultants. When in doubt about achieving their goals, they are willing to turn to competent, trustworthy people who share and support their dreams and seek their advice, whether it is family, friends or professionals.

Visualization of Well-defined Goals

Successful people can visualize well-defined, positively stated goals. They possess a clear vision of exactly what they wish to accomplish in life. They have a picture in their mind of what they will feel, hear, smell, taste once they achieve success.

Create Blueprints to Achieve their Goals

Successful people create blueprints to point them in the direction they need to work toward to achieve their goals. With a blueprint to guide them, they can monitor their progress and make corrections in a timely manner should they stray off the road to success.⁶⁻¹⁰

Creating a Blueprint to Achieve Total Success

Whether you're just starting a career or been in business for 20 years, it is important you develop a routine that clarifies goals and gives direction to achieve them. By creating and following a **Blueprint for Total Success**, your long and short-term goals are successfully achieved.

The Greek philosopher, Aristotle, wrote *"All men seek one goal: success or happiness. First have a definite clear, practical ideal - a goal, an objective. Second have the necessary means to achieve your ends - wisdom, money, materials and methods. Third, adjust all your means to that end."*

A more modern day philosopher and baseball great, Yogi Berra stated, *"If you don't know where you're going, you'll probably end up somewhere else."*

As important as goal setting is in achieving success, most people spend more time shopping for a new car than planning their lives by setting goals. The problem most people have with achieving their goals is the goals

they set for themselves are vague and general and thus seem too overwhelming to achieve. When setting goals one must clarify outcomes in detail and then determine exactly how to accomplish them. The most effective way to successfully achieve goals is to follow a blueprint that provides a step-by-step process to set and achieve goals. Once the blueprint is in place, major goals which seem too overwhelming to achieve, are broken down into smaller more manageable minor goals and tasks.

Building a life of Total Success is like building a house. All houses share certain features. They have bedrooms, bathrooms, a kitchen and living areas with the necessary plumbing and electrical requirements. However, depending on a homeowner's specifications, houses will differ from each other in their layout, their construction and their decoration. When building your dream house, you don't stand next to the builder at the construction site giving instructions on whether to put the living room here and the bedroom there. You go to an architect to design a detailed blueprint for the builder to follow during construction. With the blueprint in hand, the builder knows exactly what has to be accomplished to successfully build a home. The builder knows where to lay the foundations, which rooms are on the first floor, which on the second floor and the materials needed to finish the job. Similarly, with the blueprint in hand, the homeowner can monitor the builder to insure construction is progressing exactly as planned. Once the house is constructed, the final decorating touches are added.

The same is true when trying to build a successful life. You can't achieve success haphazardly. You need a blueprint to determine how you want your life structured. You need to arrange the cornerstones of your life so they are in balance with each other. You need a blueprint to establish those talents and skills you need to achieve Total Success. You need a blueprint to enable you to make effective choices to achieve the life you desire.

The seven sections in your Blueprint for Total Success provide direction. Each section covers a step in the development of the blueprint (Figure 1).

The seven sections are:

- Major Goals
- Minor Goals
- Tasks
- Success Values
- Hungers
- Visual Images/Monitors
- Obstacles

The *Major Goals* section is subdivided into:

- Goal
- Validation
- Desired state
- Present state
- Difference
- Intended date of completion (I.D.O.C.)

The eight steps involved in completing your Blueprint for Total Success are:

1. **Step One:** Discover who you are
2. **Step Two:** Discover where you are
3. **Step Three:** Visualize your goals
4. **Step Four:** Validate your goals
5. **Step Five:** Identify obstacles
6. **Step Six:** Establish your timetable
7. **Step Seven:** Decide on your strategies
8. **Step Eight:** Monitor your success

Step One: Discover Who You Are – Values and Emotional Needs

The first step in creating your Blueprint for Total Success is discovering who you are. Returning to the building a house analogy, the first step when building a house is buying land. Before purchase it is necessary to assess if the land is suitable for construction so the necessary improvements can be determined. The same is true when creating goals. It's not until you define your identity that you can create your Blueprint for Total Success. You can't design a Blueprint for Total Success until you answer the question **"Who are you?"**

If we were to meet and I asked "Who are you?" you might answer "I'm a 28 year old dental student, single, \$250,000 in debt, blond hair, fit, love to hike, and travel"

What you described is not "Who you are", but "What you are". You wrote down your vital statistics, what you do for a living, your appearance, and your environment. None of this information is necessary to achieve your goals or live a life of enjoyment.

To answer the question "Who are you?," you must become aware of your: **success values**, **emotional needs** and **visions**.

Blueprint for Total Success Chart

The form is titled "BLUEPRINT FOR SUCCESS" and includes a "DATE" field. It is organized into several sections:

- MAJOR GOAL:** A box containing fields for Goal, Validation, Present state, Desired state, Difference, and I.D.O.C.
- MINOR GOAL 1, 2, 3:** Three columns, each with fields for the goal name and I.D.O.C.
- TASK 1, 2:** A grid of boxes for tasks, with each box containing fields for the task name and I.D.O.C.
- SUCCESS VALUES:** A box with multiple horizontal lines for text entry.
- EMOTIONAL NEEDS:** A box with multiple horizontal lines for text entry.
- VISUAL IMAGE:** A box with multiple horizontal lines for text entry.
- OBSTACLES:** A box with multiple horizontal lines for text entry.

Figure 1. Blueprint for Total Success chart.

SAMPLE - BLUEPRINT FOR SUCCESS

Date _____

MAJOR GOAL

Goal: I retire with \$4,000,000 in accumulated wealth at age 65 in good physical and emotional health.

Validation: Provide time to enjoy family, hobbies

Desired state: 60 years old, accumulated wealth of \$4,000,000, \$0 outstanding debt.

Present state: 28 years old, loans of \$400,000, Earnings of \$125,000 annually.

Difference: 30 years, -\$4,400,000

I.D.O.C.: 09/30/47

<p>MINOR GOAL 1</p> <p>I accumulate wealth of +\$100,000 . . .</p> <p>I.D.O.C. 01/01/22</p>	<p>MINOR GOAL 2</p> <p>I adopt a healthy lifestyle . . .</p> <p>I.D.O.C. 10/01/17</p>	<p>MINOR GOAL 3</p> <p>I learn how to be happy and enjoy life . . .</p> <p>I.D.O.C.10/01/17</p>
<p>TASK 1</p> <p>I join an established dental practice earning \$150,000/yr</p> <p>I.D.O.C. 9/01/17</p>	<p>TASK 1</p> <p>I establish and follow a daily exercise plan . . .</p> <p>I.D.O.C. 10/01/17</p>	<p>TASK 1</p> <p>I maintain a positive attitude . . .</p> <p>I.D.O.C.10/01/17</p>
<p>TASK 2</p> <p>I establish a savings plan (10% of net income)</p> <p>I.D.O.C. 10/01/17</p>	<p>TASK 2</p> <p>I follow a healthy diet and reduced calorie intake</p> <p>I.D.O.C. 10/01/17</p>	<p>TASK 2</p> <p>I associate with people that make me comfortable</p> <p>I.D.O.C. 10/01/17</p>
<p>SUCCESS VALUES</p> <ul style="list-style-type: none"> • I treat all people with fairness and respect. • Everything I do is in the best interest of my family. • I live in the present and do not concern myself with the future 	<p>EMOTIONAL NEEDS</p> <ul style="list-style-type: none"> • Need to receive praise • Need to be in control 	
<p>VISUAL IMAGE</p> <ul style="list-style-type: none"> • Cycling or playing tennis every morning. • Traveling to foreign countries. • Teaching at a university. • Volunteering my time • Looking great in clothes • Large balance in checkbook 	<p>OBSTACLES</p> <ul style="list-style-type: none"> • Lack of financial resources • Children's education • Excessive family and business obligations 	

Figure 2. Sample ~ Blueprint for Total Success chart.

Blueprint for Practice Success Chart

BLUEPRINT FOR PRACTICE SUCCESS

Date _____

MAJOR GOAL

Goal: _____

Validation: _____

Present state: _____

Desired state: _____

Difference: _____

I.D.O.C.: _____

<p>MINOR GOAL 1</p> <p>_____</p> <p>I.D.O.C. _____</p>	<p>MINOR GOAL 2</p> <p>_____</p> <p>I.D.O.C. _____</p>
<p>TASK 1</p> <p>_____</p> <p>I.D.O.C. _____</p>	<p>TASK 1</p> <p>_____</p> <p>I.D.O.C. _____</p>
<p>TASK 2</p> <p>_____</p> <p>I.D.O.C. _____</p>	<p>TASK 2</p> <p>_____</p> <p>I.D.O.C. _____</p>
<p>TASK 3</p> <p>_____</p> <p>I.D.O.C. _____</p>	<p>TASK 3</p> <p>_____</p> <p>I.D.O.C. _____</p>
<p>VISUAL IMAGE</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>VISUAL IMAGE</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>OBSTACLES</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>OBSTACLES</p> <p>_____</p> <p>_____</p> <p>_____</p>

Figure 3. Blueprint for Practice Success chart

SAMPLE - BLUEPRINT FOR PRACTICE SUCCESS

Date _____

MAJOR GOAL (previous Minor goal 1)

Goal: I accumulate \$100,000 in wealth

Validation: Repay school debt and plan for retirement . . .

Desired state: Accumulated wealth of +\$100,000 . . .

Present state: In school with debt of \$400,000

Difference: 5 years, \$500,000

I.D.O.C.: 06/30/22

<p>MINOR GOAL 1</p> <p>I join an established dental practice earning \$150,000/yr.</p> <p>I.D.O.C. 09/01/17</p>	<p>MINOR GOAL 2</p> <p>I establish and follow a savings and investment plan.</p> <p>I.D.O.C. 1/01/18</p>
<p>TASK 1</p> <p>I investigate opportunities in dental journals, dental suppliers.</p> <p>I.D.O.C. 04/01/17</p>	<p>TASK 1</p> <p>I create my financial team - attorney, accountant and financial advisor.</p> <p>I.D.O.C. 05/01/17</p>
<p>TASK 2</p> <p>I network with established dentists at dental society meetings and events.</p> <p>I.D.O.C. 04/01/17</p>	<p>TASK 2</p> <p>I control expenses to save 10% of gross income.</p> <p>I.D.O.C. 03/02/18</p>
<p>TASK 3</p> <p>I attend CE courses on establishing a dental practice.</p> <p>I.D.O.C. 06/30/17</p>	<p>TASK 3</p> <p>I create an investment strategy to achieve 4% annual growth.</p> <p>I.D.O.C. 04/30/18</p>
<p>VISUAL IMAGE</p> <ul style="list-style-type: none"> • Treating patients in attractively designed dental practice • Adequate support staff of receptionists, dental assistants, hygienists. 	<p>VISUAL IMAGE</p> <ul style="list-style-type: none"> • Financial statement showing balance of \$100,000. • On the phone with financial advisor.
<p>OBSTACLES</p> <ul style="list-style-type: none"> • Minimal experience in surgical and advanced restorative dentistry. 	<p>OBSTACLES</p> <ul style="list-style-type: none"> • Lack of discipline to live within means. • Lack of financial acumen.

Figure 4. Sample ~ Blueprint for Practice Success chart

Success Values

Success values are principles and beliefs that are important to you. By identifying them you avoid setting goals that are inappropriate or in conflict with your life. For example, suppose you have a success value "Everything I do will be in the best interest of my family." One of your goals as a parent may be to attend as many as your child's school events and sports activities as possible. This goal would be supported by your success value.

However, you may also have a goal of establishing a high volume/high production business necessitating the devotion of many hours to work, instead of being with your family. This goal would be in conflict with your success value, resulting in resentment and dissatisfaction with your work.

Defining your success values is the foundation on which your goals will rest. If you have difficulty in defining your own success values, look to outside sources and adopt those values as your own. Some sources for success values are inspirational books and books of quotations. You can also refer to the following list for ideas. Don't choose values you think others would want you to pick. Choose values that are inherent and best describe you. The

degree of honesty of your values will determine how comfortable you are in your goals. The

greater your comfort level with your goals, the greater chance of achieving them.



Success Values

Rate the following values from 1 (No way that's me) to 5 (Definitely me). On the blank Blueprint for Total Success (see figure 1) list those values that you rated highest in the box marked "Success Values".

Listing of Success Values	
Rate the following Values from 1 (No way that's me) to 5 (Definitely me):	
<input type="checkbox"/>	Adventurous I'm open to taking risks in my life.
<input type="checkbox"/>	Artistic I enjoy the arts (painting, sculptor, music, and dance) either through work or my association with others.
<input type="checkbox"/>	Attracted to beauty I appreciate beauty – people, things, ideas and am attracted to it in my personal and business life.
<input type="checkbox"/>	Belonging Involvement in a group or organization is important in my social and business life.
<input type="checkbox"/>	Change I welcome change in my life – career, socially, personal relationships.
<input type="checkbox"/>	Community involvement I have an obligation to be involved with my community.
<input type="checkbox"/>	Competitive I enjoy competition – work, sports, personal relationships.
<input type="checkbox"/>	Controlling I need to be control of my life and situations.
<input type="checkbox"/>	Creative I respect creativity in others and strive for personal creativity.
<input type="checkbox"/>	Decisive I have a need to be a decision maker and not rely on others to make decisions for me.
<input type="checkbox"/>	Excited I seek exciting experiences and environments.
<input type="checkbox"/>	Family oriented My work and activities are focused on meeting my family's needs.
<input type="checkbox"/>	Fast paced Life is short so I try to accomplish and experience as much is possible.
<input type="checkbox"/>	Flexible I go with the flow of my surroundings.
<input type="checkbox"/>	Free I want the freedom to do what I want to do with limited restrictions from others.
<input type="checkbox"/>	Healthy The focus of my habits and activities is to maintain optimum health.
<input type="checkbox"/>	Helping I seek opportunities to help others create a better world.
<input type="checkbox"/>	Interactive I enjoy interacting with others in my personal and professional capacities.
<input type="checkbox"/>	Influential I seek to influence or have control over others.
<input type="checkbox"/>	Knowledgeable I appreciate knowledge in others and seek to be knowledgeable.
<input type="checkbox"/>	Leader I enjoy being the leader.
<input type="checkbox"/>	Moral My activities contribute to the advancement of moral standards that are important to me.
<input type="checkbox"/>	Physical I enjoy work and activities that involve a large degree of physical activity.
<input type="checkbox"/>	Powerful I desire power and authority over others.
<input type="checkbox"/>	Pressure I welcome high-pressure situations.
<input type="checkbox"/>	Recognition I value recognition for my accomplishments and readily extend recognition to others for their accomplishments.
<input type="checkbox"/>	Responsible I am willing to accept responsibility for my actions.
<input type="checkbox"/>	Secure I seek ways to maximize personal and family security for the present and in the future.
<input type="checkbox"/>	Solitude I prefer being alone rather than in the company of others.
<input type="checkbox"/>	Stability I prefer work, activities and relationships that do not change over time.
<input type="checkbox"/>	Structured I lead a very structured life. Change is disruptive.
<input type="checkbox"/>	Residence Where I live allows me to participate in my hobbies and interests regularly.
<input type="checkbox"/>	Thinking I enjoy activities requiring thinking and analysis.
<input type="checkbox"/>	Understanding I make every effort to understand other points of view.
<input type="checkbox"/>	Value I believe all people have value and treat them accordingly.
<input type="checkbox"/>	Work I have a strong work ethic.
<input type="checkbox"/>	Youth I believe young people are our future and should be given every opportunity to succeed.
Success Values not listed:	

Sometimes your values are in conflict with each other. For example, returning to the value “Everything I do is in the best interest of my family” (see Figure 2, Success Value box) you have to define what “is in the best interest of your family”. It may seem more important for you to attend your children’s activities than spend time at work. However, if you are the primary or sole income earner it may be more pressing for you to spend more time at the office to maximize your income so your family can enjoy a comfortable lifestyle. In many cases it may be difficult to resolve this issue to your satisfaction. It may be necessary for you to discuss your needs with your family and see what preferences they have.

Similarly, having the value “I treat all people with fairness and respect” augments a desire as a dentist to provide optimal and fair treatment to patients. However, a value of “I live in the present and do not concern myself with the future” would hamper the institution of a retirement plan.

Once you identify your values, record them in the Success Values section of your blueprint (see Figure 1). Refer back to your blueprint as you choose your success strategies, to determine if they are in sync with your values.

Emotional Needs

We all have emotional needs. In the 1940’s, psychologist Abraham Maslow formulated his “*Hierarchy of Needs Theory*”. Maslow proposed that people have needs that must be met to create a satisfying life. There are basic needs such as the need for food, shelter, and security and higher needs such as social needs (affection, friendship, belonging), esteem needs (self-respect, recognition, attention) and self-actualization (being the best one can be). Maslow further proposed these needs will motivate individuals to take action until they are fulfilled (Figure 5).

For example, take a person’s Physiological need for food, which is expressed as hunger.

When a person is mildly hungry, he or she will seek food that tastes good, looks good and somewhat nutritious. If foods meeting the criteria aren’t available and eating is delayed, the



Figure 5. Maslow’s “Hierarchy of Needs”

mild hunger evolves into a moderate hunger. At this stage, the individual becomes less selective in their choices of food to satisfy their hunger. Now they are willing to eat food that may not taste as good and loaded with sugar and fat. If their hunger is still not satisfied (they don’t have money to buy food) it becomes ravenous, and the individual becomes even less selective and resorts to extremes to satisfy their hunger. A starving person will go through the extreme of sifting through a trash bin seeking food.

Emotional needs are similar. If emotional needs aren’t satisfied in a timely manner, the action used to satisfy the need becomes more extreme.

For example, let’s look at a child’s need for a parent’s attention.

At first a child will call out the parent’s name. If the parent is engrossed in another activity and ignores the child, the child begins tugging at the parent’s arm. If still ignored, the child begins to whine. If still ignored, the child progresses to a tantrum of crying, kicking and screaming. The parent finally takes note of the child and directs her attention to him. The child’s need for attention is satisfied, but now the child has learned that one sure way to receive that attention is to throw a tantrum and may immediately resort to acting in that manner whenever ignored.

There is nothing wrong with having emotional needs or hungers as long as we realize there

are healthy and unhealthy ways to feed them. How do we satisfy our need for food? With junk food or nourishing meals? With meals of adequate portions spaced out during the day or by bingeing and overeating? When we're not eating is the thought of food out of our mind or do we obsess about our next meal?

How we feed our emotional needs makes all the difference in the quality of life we experience. If we are consumed with feeding one particular need, we may ignore feeding others necessary to achieve a balanced life.

For example, an individual with an emotional need to be praised may seek satisfying that need by agreeing to every request made of them by others. While the need for praise will be satisfied, the individual and their family may become resentful of the demands made on their time and energy.

Identifying Emotional Needs

Before we can learn how to appropriately satisfy our emotional needs it is necessary to identify them.



Identifying Emotional Needs

Rate the following emotional needs from 1 (No way that's me) to 5 (Definitely me). On the blank Blueprint for Total Success (see figure 1), list those emotional needs you rated highest in the box marked "Emotional Needs".

Listing of Emotional Needs		
Rate the following items from 1 (No way that's me) to 5 (Definitely me):		
<input type="checkbox"/> Receive attention	<input type="checkbox"/> Feel important	<input type="checkbox"/> Be successful
<input type="checkbox"/> Receive admiration	<input type="checkbox"/> Feel secure	<input type="checkbox"/> Be in control
<input type="checkbox"/> Receive respect	<input type="checkbox"/> Feel free or unrestricted	<input type="checkbox"/> Be right
<input type="checkbox"/> Receive acceptance	<input type="checkbox"/> Feel valuable	<input type="checkbox"/> Be a leader
<input type="checkbox"/> Receive recognition	<input type="checkbox"/> Feel needed	<input type="checkbox"/> Be useful
<input type="checkbox"/> Receive appreciation	<input type="checkbox"/> Feel safe	<input type="checkbox"/> Be fashionable
<input type="checkbox"/> Receive praise	<input type="checkbox"/> Feel loved	<input type="checkbox"/> Teach others
<input type="checkbox"/> Receive credit or thanks	<input type="checkbox"/> Feel connected	<input type="checkbox"/> Accomplish or achieve
<input type="checkbox"/> Receive compliments	<input type="checkbox"/> Feel heard or listened to	<input type="checkbox"/> Maintain order
<input type="checkbox"/> Receive care	<input type="checkbox"/> Feel whole	<input type="checkbox"/> Give to others
<input type="checkbox"/> Receive support	<input type="checkbox"/> Feel complete	<input type="checkbox"/> Be perfect
<input type="checkbox"/> Receive gifts	<input type="checkbox"/> Feel excited	<input type="checkbox"/> Be responsible
<input type="checkbox"/> Receive tenderness	<input type="checkbox"/> Feel energized	<input type="checkbox"/> Be busy/work hard
<input type="checkbox"/> Receive touch	<input type="checkbox"/> Feel at peace	<input type="checkbox"/> Be creative
<input type="checkbox"/> Receive information	<input type="checkbox"/> Feel inspired	<input type="checkbox"/> Maintain consistency
<input type="checkbox"/> Receive help	<input type="checkbox"/> Feel honored	<input type="checkbox"/> Be different/unique
<input type="checkbox"/> Receive loyalty	<input type="checkbox"/> Feel clarity/certainty	<input type="checkbox"/> Get results
<input type="checkbox"/> Receive encouragement	<input type="checkbox"/> Feel desired	<input type="checkbox"/> Do the right thing
Emotional Needs not listed:		
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Answer the following questions. Your answers will aid you in creating your goals and establishing your strategies.

Using a scale of 0 to 100 (0 = totally unsatisfied to 100 = totally satisfied):

How well are you satisfying each Emotional Need right now?

1. _____
2. _____
3. _____

Have these Emotional Needs been satisfied in the past? Who or what helped satisfy them?

1. _____
2. _____
3. _____

What are 3 action steps you can take this week that will help start satisfying each of your emotional needs in a healthy and constructive manner?

Emotional Needs Action Steps:

1. _____
 - a. _____
 - b. _____
 - c. _____
2. _____
 - a. _____
 - b. _____
 - c. _____
3. _____
 - a. _____
 - b. _____
 - c. _____

Referring to Figure 2 (Emotional Needs box), there are two listed needs; the needs to receive praise and to be in control. If looked upon in the context of a dentist's personal and professional lives, these emotional needs can be satisfied through various avenues. The need to receive praise can be satisfied by receiving praise from patients, staff, civic organizations and family. Assuming the dentist receives sufficient praise to satisfy the emotional need from patients and staff, the dentist may not need to infringe on family time with excessive involvement with civic organizations. However, if the need to be in control affects staff management style, and the dentist does not receive adequate praise from staff, the need to seek praise from another outlet (civic organizations) may be sought. This may reduce the time spent with family resulting in overall familial discontent.

Once emotional needs are recognized, you have the ability to evaluate how well the goals you want to achieve will satisfy them. The greater satisfaction and the less conflict you derive from working toward and achieving your goals, the greater chance of achieving Total Success.

Where Are You?

In his bestseller book, *The Success Journey*, author John Maxwell writes, "True success is not a thing you acquire or achieve. Rather it is a journey you take your whole life long."

If indeed the quest for success is a journey, then the steps for achieving success should be the same as planning a trip.

The steps one takes when planning a trip are:

- Decide on your destination.
- Discover your starting point.
- Determine the best way to reach your destination.

Accomplishing these steps enables you to determine the best route (most direct or scenic), mode of transportation and timetable. The same is true when embarking on your life's "success journey". If you know your starting point and you know your destination, you can calculate the distance and time you need to travel and the strategies to get you there.

Whether you seek success in your professional or personal life, your journey begins by asking yourself three questions.

- What do I want?
- What is happening now?
- What is the difference?

By comparing your desired goal to your present state, you can begin to calculate the amount of effort, time and resources required to reach the desired goal. You can also evaluate the resources and skills you currently possess that will help you achieve your goals. You may surprise yourself and find yourself closer to reaching your goals sooner than you thought.

For example, if you are 30-years old with a goal of retiring at age 60, you have the luxury of time to build your retirement fund over 30 years. You can select a lifestyle and make adjustments to your expenditures and contributions toward your retirement over a period of time.

However, if you are 50-years old and your goal is to retire at age 60 with the same lifestyle you currently enjoy, you must determine the amount of money you will need in your retirement plan at the time of retirement and compare it to the amount to your current savings. If you led a moderate lifestyle and consistently saved from the start of your career, you may find yourself closer to your goal than originally thought. If you maintained a higher lifestyle and contributed less to your wealth accumulation plan, you may find a greater disparity in what you need and what you have. To overcome this disparity you must make choices. You can continue with your current savings strategy and retire at later age or reduce your lifestyle, contribute more to your retirement plan and retire when planned. Before strategies can be formulated to achieve your goals you need to know your starting point and your destination.

To determine your starting point complete the Personal Life and Professional Life Assessments.

The assessments are comprised of three sections, each section representing a cornerstone of Total Success: Financial Health, Physical Health, and Emotional Health. Completing the assessments enables you to evaluate where you are in your personal and professional lives, and how much effort is needed to improve them. You have an indication

of where you are in your life now and those areas in your life you need to work on to achieve more wealth, health and happiness.

There are no correct or incorrect answers. Your goal is to rate yourself or your practice with complete honesty. The assessments will delve into many areas of your personal and professional life but are not all-inclusive. As you complete the assessments, you may become aware of areas that are not listed. Feel free to make adjustments to the assessments to fit your needs.

Personal Life Assessment

Personal Financial Life Assessment

Money, money, money... Most people feel they don't have enough of it. They may feel it is a measurement of success. They may feel insecure or a sense of failure by the lack of it.

By completing the Personal Financial Life Assessment you get an idea of how much money you truly need to be financially independent and how close or far you are from achieving it.

Personal Physical Health Assessment

The Personal Physical Health Assessment measures more than just your physical health. It also measures your attitude about health and the influence of your environment on your health. It indicates to you those areas of your physical life contributing to a healthy lifestyle and those needing improvement.

By achieving optimum health you have the energy and strength to effortlessly accomplish whatever you choose, as well as having the backup energy to handle whatever emergencies may arise in your life.

Personal Emotional Health Assessment

We are all engaged in activities and situations that cause us stress: work, school, relationships, financial situations and life events. Stress can't be eliminated completely nor do we want to eliminate it completely. Some stress is healthy and propels us toward achievement of goals. It's when stress becomes excessive in our lives or we are unable to manage stress that it causes emotional instability and problems.



Personal Financial Life Assessment

By completing the Personal Financial Life Assessment you get an idea of how much money you truly need to be financially independent and how close or far you are from achieving it.

Personal Financial Life Assessment	
Rate the following statements from 1 (Virtually not at all) to 5 (Absolutely true):	
1.	<input type="text"/> I currently save at least 10% of my income.
2.	<input type="text"/> I have an idea of how much I need to be financially independent.
3.	<input type="text"/> I have a written plan to achieve financial independence.
4.	<input type="text"/> I have three months of easily accessible savings for an emergency or illness.
5.	<input type="text"/> I live well but within my means.
6.	<input type="text"/> I have a weekly budget that allows me to do the things I enjoy.
7.	<input type="text"/> I have a written one-year financial plan in place.
8.	<input type="text"/> I know how much I am worth at this time.
9.	<input type="text"/> I pay my utility and rent/mortgage bills on time.
10.	<input type="text"/> I pay my credit card balances within thirty days of receipt.
11.	<input type="text"/> I consult with financial planners on a regular basis (accountants, investment advisors, estate planners).
12.	<input type="text"/> I have the proper vehicles in place for transferring wealth to my loved ones and survivors (wills, trusts, and estate plans).
13.	<input type="text"/> I have established the vehicles for long-term savings (house, college).
14.	<input type="text"/> I have a retirement plan in place (IRA, 401K, pension).
15.	<input type="text"/> I have adequate health, disability, long term care, life, home and property insurance.
16.	<input type="text"/> My source of income is stable.
17.	<input type="text"/> I have a financially rewarding business/ career commensurate with my skill, talents and education.
18.	<input type="text"/> I have the opportunity to advance in my business/career.
19.	<input type="text"/> My financial vision is in sync with those around me.
20.	<input type="text"/> I control my money rather than my money controlling me.
Total Score: _____	

Personal Physical Health Assessment

By achieving optimum health you have the energy and strength to effortlessly accomplish whatever you choose, as well as having the backup energy to handle whatever emergencies may arise in your life.

Personal Physical Health Assessment

Rate the following statements from 1 (Virtually not at all) to 5 (Absolutely true):

- | | |
|-----|--|
| 1. | <input type="checkbox"/> I have undergone appropriate physical check ups within the last year (eyes, ears, general, blood tests, dental, etc.). |
| 2. | <input type="checkbox"/> I am at the ideal weight for my size/body type. |
| 3. | <input type="checkbox"/> I exercise regularly (3 times/week). |
| 4. | <input type="checkbox"/> I am physically fit for my age. |
| 5. | <input type="checkbox"/> I have no neglected medical problems. |
| 6. | <input type="checkbox"/> I get enough sleep with no reoccurring problems. (i.e. insomnia, sleep apnea, etc.). |
| 7. | <input type="checkbox"/> I regularly have "quiet/down time." |
| 8. | <input type="checkbox"/> I eat foods that provide optimum nutrition/supplementation. |
| 9. | <input type="checkbox"/> I drink adequate amounts of water (minimum 32 ounces/day). |
| 10. | <input type="checkbox"/> I avoid foods and habits that are deleterious to my health or reduce my energy (excessive caffeine, sugar, high fat, alcohol, tobacco, drugs etc.). |
| 11. | <input type="checkbox"/> I recognize my illnesses and injuries and seek treatment in a timely manner. |
| 12. | <input type="checkbox"/> I have healthy ways of relieving my stress (exercise, therapy, talking meditation). |
| 13. | <input type="checkbox"/> My physical environment contains minimal toxic substances, (asbestos, lead, pollutants, noise, etc.) that can harm my body or reduce my energy. |
| 14. | <input type="checkbox"/> I experience adequate light, fresh air and comfortable temperatures. |
| 15. | <input type="checkbox"/> I surround myself with a neat, clean, and pleasant environment. |
| 16. | <input type="checkbox"/> My life is well organized. |
| 17. | <input type="checkbox"/> I regularly indulge my body in ways that make it feel and look great (massages, haircuts, manicures, saunas, etc.). |
| 18. | <input type="checkbox"/> I wear clothes that are comfortable, enjoyable, and make me look great. |
| 19. | <input type="checkbox"/> I participate in physical activities regularly that are enjoyable, stimulating and energizing. |
| 20. | <input type="checkbox"/> I am satisfied with the quantity and quality of my sexual life. |

Total Score: _____

Personal Emotional Health Assessment

The first step in controlling stress is to assess our emotional makeup and ability to react to stress. It's only then we can take steps to create emotional stability and tranquility.

Personal Emotional Health Assessment	
Rate the following statements from 1 (Virtually not at all) to 5 (Absolutely true):	
1.	<input type="checkbox"/> I get along well with the people in my life (family, friends, coworkers, and bosses).
2.	<input type="checkbox"/> I surround myself with people who want to be with me, because of the type of person I am, and not for what I can do for them.
3.	<input type="checkbox"/> I can control my rage although I feel justified for feeling it.
4.	<input type="checkbox"/> I have the ability to let go of people who make me feel uncomfortable or take advantage of me.
5.	<input type="checkbox"/> I'm comfortable seeking the help and advice of others, in times of need, rather than go it alone.
6.	<input type="checkbox"/> I readily say, "I'm sorry" when I know I am at fault.
7.	<input type="checkbox"/> I can accept the fact I am not perfect.
8.	<input type="checkbox"/> I believe that out of every negative situation, there is something to be learned or gained.
9.	<input type="checkbox"/> I recognize my emotional needs and know how to take care of them.
10.	<input type="checkbox"/> I live my life on my terms and not others.
11.	<input type="checkbox"/> I have the ability to say "no" without guilt.
12.	<input type="checkbox"/> I have the ability to forgive others and not hold a grudge.
13.	<input type="checkbox"/> I maintain a positive attitude and always see the glass as "half full".
14.	<input type="checkbox"/> I don't let the small things bother me obsessively.
15.	<input type="checkbox"/> I confront and deal with uncomfortable situations rather than hide from them.
16.	<input type="checkbox"/> I have the ability to distinguish between inconveniences and problems.
17.	<input type="checkbox"/> I don't obsess over events and situations that have occurred and I can no longer change the outcome.
18.	<input type="checkbox"/> I spend ten minutes a day doing absolutely nothing.
19.	<input type="checkbox"/> I feel there are enough hours in the day to accomplish everything that I need to do.
20.	<input type="checkbox"/> I have a best friend or soul mate in which I can confide truthfully.
Total Score: _____	

The first step in controlling stress is to assess our emotional makeup and ability to react to stress. It's only then we can take steps to create emotional stability and tranquility.

Professional Life Assessment

Completing the Professional Life Assessments enables you to evaluate where you are in your professional life, and what you need to do to improve it. After completing these assessments, you will have an indication of where you are in your professional life now and in which areas you need to work on to achieve more professional satisfaction, health and happiness.

There are no right or wrong answers. Your goal is to rate yourself or your practice with complete

honesty. The assessments will delve into many areas of your professional life but are not all-inclusive. As you complete the assessments, you may become aware of areas that are not listed. Feel free to make adjustments to the assessments to fit your needs.

Practice Financial Assessment

Money, money, money... most dentists feel they don't have enough of it after all the expenses are paid. They may feel "net income" is a measurement of success. They may feel insecure or a sense of failure by the lack of it. By completing the Practice Financial Assessment you will get an idea of how successful your practice is meeting your financial needs and those area that need improvement.

Practice Financial Assessment

Money, money, money... most dentists feel they don't have enough of it after all the expenses are paid. They may feel "net income" is a measurement of success. They may feel insecure or a sense of failure by the lack of it. By completing the Practice Financial Assessment you will get an idea of how successful your practice is meeting your financial needs and those area that need improvement.

Practice Financial Assessment	
Rate the following statements from 1 (Virtually not at all) to 5 (Absolutely true):	
1.	<input type="checkbox"/> I have an accurate idea of what my personal financial needs are.
2.	<input type="checkbox"/> The practice generates enough net income to meet my personal financial needs.
3.	<input type="checkbox"/> I am aware of the monthly practice gross production and the areas that contribute to it (dentist and hygiene production).
4.	<input type="checkbox"/> I am aware of the precise amount of monthly practice collections.
5.	<input type="checkbox"/> I am aware of the monthly collection/production ratio.
6.	<input type="checkbox"/> I am aware the amount of monthly practice overhead and the factors that contribute to it (salaries, supplies, utilities, etc.).
7.	<input type="checkbox"/> I am satisfied with the amount of practice production.
8.	<input type="checkbox"/> I am satisfied with amount of office collection.
9.	<input type="checkbox"/> I have a written one-year financial plan in place (number of new patients, number of returning patients, production, collection, net profit).
10.	<input type="checkbox"/> I have easily accessible savings or a credit line to cover expenses for an emergency or economic slowdown.
11.	<input type="checkbox"/> I have adequate cash flow to pay myself before I pay office expenses.
12.	<input type="checkbox"/> Practice fees are evaluated and adjusted annually.
13.	<input type="checkbox"/> I set aside monies to invest in service facilities (new equipment, decoration).
14.	<input type="checkbox"/> My finances are such that I can take four weeks time off for vacation and continuing education.
15.	<input type="checkbox"/> I pay bills with high interest rates (credit cards) within thirty days.
16.	<input type="checkbox"/> I pay my utility and rent/mortgage bills on time.
17.	<input type="checkbox"/> I consult with financial planners on a regular basis (accountants, investment advisors, estate planners).
18.	<input type="checkbox"/> I have a retirement plan in place (IRA, 401K, pension).
19.	<input type="checkbox"/> I have adequate health, disability, life, malpractice, overhead, office and property insurance.
20.	<input type="checkbox"/> I control practice finances rather than have practice finances control me.
Total Score: _____	

Professional Physical Health Assessment

The Professional Physical Health Assessment measures more than just the physical layout of your office. It also measures the effect the practice’s physical characteristics have on staff productivity and attitude. It indicates to you how the physical layout of the office contributes to patient satisfaction with your practice. By designing and creating a facility with an optimum physical layout, you and your staff have the means to create an enjoyable working environment to provide great customer service to your patients.

Professional Physical Health Assessment	
Rate the following statements from 1 (Virtually not at all) to 5 (Absolutely true):	
1.	<input type="checkbox"/> The dentist or staff conducts a visual inspection of the entire office (inside and outside areas) twice daily.
2.	<input type="checkbox"/> Outside areas are attractive and appealing to patients and passersby (landscaping, signs, etc.).
3.	<input type="checkbox"/> Outside areas provide for adequate parking, lighting and easy access to office.
4.	<input type="checkbox"/> The physical plant provides adequate light, fresh air and comfortable temperatures.
5.	<input type="checkbox"/> The physical size (square footage) of the office adequately accommodates patient volume.
6.	<input type="checkbox"/> The design layout contributes to efficient patient flow.
7.	<input type="checkbox"/> The design layout allows for total patient confidentiality.
8.	<input type="checkbox"/> The staff has adequate space to work without interfering with co-workers.
9.	<input type="checkbox"/> Daily attention is given to office cleanliness, especially areas accessible to patients (reception area, treatment areas, and bathrooms).
10.	<input type="checkbox"/> A protocol and delegation of responsibility for emergency cleanups are in place.
11.	<input type="checkbox"/> Seating, floor and wall coverings, and fixtures are replaced or repaired in a timely manner when necessary.
12.	<input type="checkbox"/> The physical plant has undergone a major face lifting and redecoration in the last 5 years.
13.	<input type="checkbox"/> Clinical and clerical equipment is maintained according to manufacturer’s recommendations.
14.	<input type="checkbox"/> Proper repairs to malfunctioning equipment are made in a timely manner.
15.	<input type="checkbox"/> Protocols for storing, handling and disposing of hazardous and non-hazardous waste are followed in accordance with governmental regulations.
16.	<input type="checkbox"/> Provisions for the safety and health for the dentist and staff are provided through the use of personal protection equipment and ergonomically safe equipment.
17.	<input type="checkbox"/> Supplies are organized and labeled so they are readily available and easily located when needed.
18.	<input type="checkbox"/> Hazardous materials and gases are stored, handled and removed from the environment in compliance with government regulations.
19.	<input type="checkbox"/> Storage of patient records is well organized and easily accessible.
20.	<input type="checkbox"/> Records of inactive patients are reviewed and purged on an annual basis.
Total Score: _____	

Professional Physical Health Assessment

The Professional Physical Health Assessment measures more than just the physical layout of your office. It also measures the effect the practice’s physical characteristics have on staff productivity and attitude. It indicates to you how the physical layout of the office

contributes to patient satisfaction with your practice. By designing and creating a facility with an optimum physical layout, you and your staff have the means to create an enjoyable working environment to provide great customer service to your patients.

Professional Emotional Health Assessment

There are many situations we encounter in the dental practice that cause us stress: difficult relationships with co-workers and patients, financial situations and unexpected daily events and mishaps. Stress can't be eliminated completely, nor do we want to eliminate it completely. Some stress is healthy and propels us toward greater productivity. It's when stress becomes too excessive in our practice for us to manage, that it causes emotional instability and personal problems. The first step in controlling stress in the office is to assess the emotional makeup of the practice and our ability to react to stress provoking situations. It's only then we can take steps to create emotional stability and tranquility in the office setting.

Professional Emotional Health Assessment	
Rate the following statements from 1 (Virtually not at all) to 5 (Absolutely true):	
1.	<input type="checkbox"/> Team members (dentist and staff) enjoy rather than dread going to the office.
2.	<input type="checkbox"/> Team members get along well with each other.
3.	<input type="checkbox"/> Team members describe the practice as a "fun place to work".
4.	<input type="checkbox"/> As the team leader I create a positive spirit for the practice.
5.	<input type="checkbox"/> Team members are satisfied with their total compensation package (salary, benefits, and vacation).
6.	<input type="checkbox"/> Team members understand their responsibilities and are provided with detailed job descriptions.
7.	<input type="checkbox"/> Team members are empowered to make decisions regarding how to perform their job without fear of consequences for mistakes.
8.	<input type="checkbox"/> Team members can express themselves without repercussions.
9.	<input type="checkbox"/> Team members are constantly provided with constructive feedback (praise and criticism) on their job performance.
10.	<input type="checkbox"/> Team members are encouraged to confront and deal with uncomfortable situations rather than hide from them.
11.	<input type="checkbox"/> Team members are aware of the philosophy and goals of the practice and how it relates to customer (patient) service.
12.	<input type="checkbox"/> The slogan "service with a smile" is a practice philosophy.
13.	<input type="checkbox"/> Team members are sensitive to patient fears as related to dental treatment (pain, financial, and time commitment).
14.	<input type="checkbox"/> Patients are invited to critique and provide suggestions to the practice via surveys.
15.	<input type="checkbox"/> A service recovery strategy is in place to correct a situation when things go wrong with patient relationships.
16.	<input type="checkbox"/> I feel that my schedule is arranged so that I can accomplish everything I need to do and not feel stressed.
17.	<input type="checkbox"/> I don't obsess over events and situations that have occurred in the office and the outcome can no longer be changed.
18.	<input type="checkbox"/> I am satisfied with the extent of every team member's contribution to the success of the practice.

Professional Emotional Health Assessment

There are many situations we encounter in the dental practice that cause us stress: difficult relationships with co-workers and patients, financial situations and unexpected daily events and mishaps. Stress can't be eliminated completely, nor do we want to eliminate it completely. Some stress is healthy and propels us toward greater productivity. It's when stress becomes too excessive in our practice for us to

manage, that it causes emotional instability and personal problems.

The first step in controlling stress in the office is to assess the emotional makeup of the practice and our ability to react to stress provoking situations. It's only then we can take steps to create emotional stability and tranquility in the office setting.

Assessment Evaluations

There are various ways to evaluate your assessment scores. One is to look at the individual statements and notice where you gave yourself scores of 1 or 2. These are specific areas that need improvement and steps should be taken immediately to correct these deficits.

The second is to take the total scores in each section and compare how balanced they are in relation to each other. Are your scores in the Financial Health Assessments much higher than in the Emotional Health Assessments? Such a discrepancy would indicate while you are earning gobs of money, you are dissatisfied with how you're doing it. If your Emotional Health Assessment scores in both the Personal and Professional assessments are low, then assistance should be sought to investigate whether your personal life is affecting your professional life and vice versa. Your goal for Total Success is to create balance in the three areas financial, physical and health areas and between personal and professional lives.

For a graphic representation of how the scores in the various categories contribute to the overall balance and satisfaction in your life, plot the total scores attained in each area on the Total Success Wheel (Figure 6). With the center of the wheel as zero and the outermost circumference 100, draw an arc that corresponds to your score in each category. The variance or imbalance of the category scores will determine how regular or irregular the wheel appears. If one imagines the wheel to be a tire on a bike, then the more irregular the tire wheel, the bumpier the ride (Figure 7).

Balancing and aligning the wheel by improving those areas in an individual's life that are deficient, creates a smoother ride to a successful and fulfilling life. The Success Assessments are intended to give you answers as to how balanced or bumpy your life is now. It doesn't answer the question on how to achieve Total Success, but it gives us an idea of where to start. The good news is that we all have the answers within ourselves; it's just a matter of finding the success strategies that are in alignment with our values.



Figure 6. Total Success Wheel

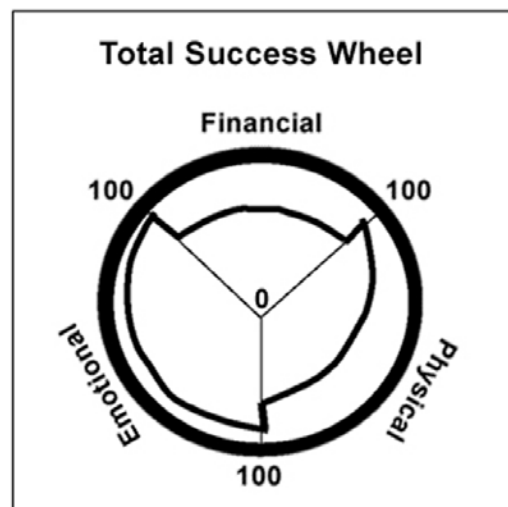


Figure 7. Plotted values on Total Success Wheel

Next to the *present state* in the *major goal* section of the blueprint, list the areas most in need of improvement to achieve Total Success.¹¹⁻¹³

Defining and Visualizing Goals

Once Success Values, Emotional Needs and Current States are identified, the goal setting process is ready to be initiated. The goal setting process entails defining and visualizing long-term (major goals) and then breaking them down into more manageable short-term (minor goals) and strategies (see Figures 2 and 3).

Defining Goals

When stating your goal, you are answering the question “What exactly do I want?”

The goal is stated in positive terms and in the present or future tense. Avoid using words like wish or want. Be specific and detailed. Indicate a defined date of completion.

Example 1:

“I lose 30 pounds in six months.”

NOT:

“I wish to lose 30 pounds in six months” or “I won’t be 30 pounds overweight in six months.”

Example 2:

“I break (or will break) a golf score of 80 by the end of the summer.”

NOT:

“I want to break a golf score of 80 by the end of the summer” or “I hope to improve my score in the future.”

Example 3:

“I retire from my profession with an accumulated wealth of \$4,000,000 dollars at age 60.”

NOT:

“Someday I’ll be able to retire in comfort” or “I want to save enough money so I won’t have to rely solely on my social security in retirement.”

Example 4:

“My practice will increase profits 25% by December 30.”

NOT:

“My practice won’t show a loss this year.”

Stating a goal as a positive statement gives more focused direction to achieving it. There is a greater likelihood of completing a journey when the destination is well-defined than when the goal is to not to be in the current location. If an individual has a desire to live in a warm climate during the winter, stating the desire as “I want to live in Florida from the beginning of January to the end of March” has more focus than “I don’t want to live in New York during the winter”. The negative statement is too diffuse without focus.

Visualizing Goals

Once a goal is defined the next step is to visualize it.

CEOs of major corporations and star athletes attribute their success to visualization. Walt Disney died before he ever had a chance to step inside Disneyworld, but by using visualization he knew exactly how the complex would look when completed. At age 12, golf pro Tiger Woods visualized himself winning the Master’s Tournament and embarked on the necessary training to achieve that goal.

Begin the visualization process by finding a comfortable and quiet place to sit (don’t lie down, you’ll fall asleep). When comfortable, take a few deep breaths to relax yourself. Close your eyes and raise them toward your forehead. Imagine you are in a theater, standing in the middle of the stage. The goal setting process begins by visualizing yourself in your desired state or situation by answering the following questions:

What will I see, hear, feel, smell and taste?

If you don’t know what you will feel when you reach your goal, you won’t know when you’ve reached it. Visualizations should be as specific and vivid as your imagination will allow. Tiger Woods visualized himself winning the Masters Tournament by picturing sinking that last putt. In his mind he saw the ball rolling toward the cup. He heard the crowd roar as the ball fell into the cup. He felt his father hug him. He pictured himself receiving the trophy while wearing the green victory jacket.

Do the same for each of your goals. Record your specific feelings and visions. If your goal is to have a large multi-doctor practice, visualize yourself standing in the middle of the business area observing six receptionists answer the phones. Picture the office decor and hearing the music playing in the background. Experience the office environment in your mind.

As you visualize each goal, open your eyes and record the details of your goals in the “visual image” section on the blueprint, devoting a different page to each goal (see Figure 1).

If you are unable to perform or are uncomfortable with the visualization process (maybe, as a child you were constantly whacked in the head by your teachers for daydreaming), you can import an image from an outside source. Suppose you have a goal of spending your retirement fishing. Find a picture of a fisherman on a boat in a lake and paste your face in the picture. Paste the composite picture in the visual image box on the blueprint. If you have a goal of a busy, cutting age practice, peruse dental trade magazines for pictures of offices that fit your vision. The visual image will act as a constant reminder of your goal(s) and help you remain focused on their realization.

Validating Goals

Why are these goals important to me?

Goals must be validated. Validation gives credibility to your goals. Unless you can come up with a good reason for your goals, it will be difficult to stay focused on achieving them. For example, if your goal to be fit and maintain a specific weight is to enable you to live a long, healthy, active life, you will constantly work toward reaching and maintaining that goal. If your reason for losing weight is to get into a special suit or dress to wear to your 20-year high school reunion to impress an old flame, you'll work hard to reach your goal initially. Once the reunion passed and you totally demoralized your old flame with how great you look, your motivation to continue working toward that goal will be diminished, resulting in regaining the lost weight.

If your goal is to retire at a relatively young age, validate the reason. Is it to enjoy your family and hobbies while you're still healthy? Is it because you hate your job? Is it just to impress others? The greater your validation, the greater likelihood of fulfilling your goals. Record your validation on your blueprint (see Figure 1).

Compare the Desired State to the Current State

What is wanted? What is happening now? What is the difference?

Before strategies can be formulated to achieve goals one needs to identify the starting point and the destination. By comparing a desired goal to the present state the amount of effort,

time and resources required to complete the goal can be calculated. The previously completed exercises should provide answers as to where you currently are and your visualization of your goal as to where you want to be. Calculate the difference. You can now evaluate the resources and skills you possess to help you achieve the goal. The information will assist you in determining your strategies and timetable.

Continuing with the example of planning a trip. If the starting point and destination are identified, the distance, time, and mode of transportation necessary to complete the trip can be determined.

A trip from New York to California involves a goal of traveling a distance of approximately 3,000 miles. If an individual wants to complete the trip in one day, flying is the required mode of transportation. If the individual has an aversion to flying and prefers to drive, then a strategy of completing the trip over a time span of three to four days must be considered. Smaller, more manageable, daily travel goals of 750 miles are planned including actual driving, eating and rest stops, i.e.:

- New York City, NY to Indianapolis, IN (701 miles)
- Indianapolis, IN to Grand Island, NE (731 miles)
- Grand Island, NE to Salt Lake City, UT (798 miles)
- Salt Lake City, UT to Los Angeles, CA (688 miles)

Similarly, if a dentist's goal to retire at age 60 with \$4,000,000 of accumulated wealth and currently has loans of \$400,000, a goal of accumulating \$4,400,000 in savings and loan payoff over 30 years is established. The dentist's blueprint (see Figure 2) breaks down the 30 year major goal into more manageable 5 year minor goals. The first five year goal is to accumulate \$500,000 of which \$400,000 will be used to satisfy the loan and to establish savings of \$100,000. Subsequent five year goals are formulated to accumulate the remaining \$3,900,000 through increased earnings from an increasingly profitable practice, savings, investments and compounded interest.

Establish a Timetable

What is my timetable for achieving my goal?

Business visionary Dale Carnegie wrote "A goal

is a dream with a timetable.” A date by which a goal is to be achieved must be pinpointed. The date is recorded in the space labeled **“I.D.O.C.”** (Intended **D**ate **O**f **C**ompletion) in the major goal section. Until an intended completion date for the goal is indicated, a timetable and strategies to succeed cannot be developed. The intended date of completion provides a sense of urgency towards achieving a goal. Having it in front of you on a daily basis helps maintain focus. Not having it, leads to dawdling and delaying techniques. As the I.D.O.C. for a particular goal is approached, the likelihood of successful completion of the goal can be evaluated and the strategies used for achievement can be reaffirmed or changed.

For example: As the I.D.O.C. for the goal, “I will have an accumulated wealth of \$100,000” in five years (see Figure 2), draws near, the likelihood of achieving that goal can be evaluated by checking the actual accumulation of wealth. If \$100,000 or more is accumulated, the strategies used to achieve the goal are affirmed and continued. If significantly less than \$100,000 is accumulated, than either the strategies used are ineffective and are to be reconsidered or the goal is unrealistic and needs to be reevaluated.

Discover Strategies

What are my strategies for achieving my goal?

Now is the time to create a step-by-step plan on how to achieve your goals. This is accomplished by breaking down the major goal into less overwhelming minor goals and supporting tasks (see Figures 2 and 3).

Continuing with the example of “Retiring from work at age 60 in 30 years with an accumulated wealth of \$4,000,000 dollars and in good physical and emotional health”, the major goal is broken down into 3 minor goals, each with supportive tasks (see Figure 2):

- Minor goal #1: I accumulate wealth of \$100,000 by January 1, 2019.
- Minor goal #2: I adopt a healthy lifestyle by October 1, 2014.
- Minor goal #3: I learn to be happy and enjoy life by October 1, 2014.

Take note the minor goals, just as major goals, are written as positive statements with intended dates of completion.

Under each minor goal are the tasks/strategies necessary to achieve the minor goal?

The tasks necessary to achieve minor goal #1 “I accumulate wealth of \$100,000” are:

- Task #1: I join an established dental practice earning \$150,000/year, I.D.O.C. 9/1/14.
- Task #2: I establish a savings plan (10% of net income), I.D.O.C. 10/1/14.

The tasks necessary to achieve minor goal #2 “I adopt a healthy lifestyle” are:

- Task #1: I establish and follow a daily exercise plan, I.D.O.C. 10/1/14.
- Task #2: I follow a healthy diet and reduce calorie intake, I.D.O.C. 10/1/14.

The tasks necessary to achieve minor goal #3 “I learn how to be happy and enjoy life” are:

- Task #1: I maintain a positive attitude, I.D.O.C. 10/1/14.
- Task #2: I associate with people that make me comfortable, I.D.O.C. 10/1/14.

While the illustration indicates only two tasks per minor goal, in reality it may be necessary to identify many more tasks to achieve your goal. The blueprint is not a static document. As you progress through life, your goals and ambitions become more complex resulting in a more complex blueprint. As the number and complexity of tasks increase, it may be necessary to upgrade tasks to minor goals and minor goals to major goals (see Figure 4). In our example, we elevate minor goal #1 “I have an accumulated wealth of \$100,000” to a major goal. Task #1 “I establish a profitable practice” is elevated to a minor goal, and add supporting tasks of “Develop and provide a business plan to lending institutions” and “Find a location for my business that will fit my lifestyle”.

Note that each minor goal and task has its own intended date of completion. The I.D.O.C. for a task must be attained before the I.D.O.C. for a minor goal and the I.D.O.C. for a minor goal must be attained before the I.D.O.C. for a major goal.

These steps are completed for each personal and professional success cornerstone: Financial Health, Physical Success, and Emotional Success. The process may seem overwhelming. However, if you work on your blueprint in increments you'll find the process manageable. Don't expect to complete your Blueprint for Total Success in one sitting. It may take weeks or even months. Work on one section at a time and allot enough time. Reserve 15 to 30 minutes each day to work on a particular item. Don't become frustrated if you encounter an obstacle and can't concentrate on that particular day. The blueprint is an ongoing process, and you have many years ahead of you to complete it.

Monitor Progress

As mayor of New York City, Ed Koch would greet his constituents by asking "How am I doing?" to monitor his popularity. Similarly, as you undertake attainment of goals, it is necessary to monitor progress toward achieving goals.

The method used to monitor progress varies with the goal. If one embarks on a weight loss program, progress is monitored by periodically weighing oneself on a scale. Wealth accumulation is monitored by analyzing monthly financial statements. Practice success is monitored by collecting and analyzing statistical data such as the number of new patients, collections and overhead on a regular basis. Surveys are utilized to monitor patient and staff satisfaction.

To illustrate the importance of monitoring progress, the goal to look fit for the 20 year high school reunion is envisioned. Strategies and tasks are developed to lose 12 pounds over a period of 6 months through calorie reduction and increased exercise. There are numerous ways to monitor progress; weighing oneself on a scale, evaluating tightness of clothes, mirror observation and compliments from others. If at the one month weigh-in the scale shows a two pound weight loss, the current program is continued as planned. However, if there is no weight loss it is necessary to evaluate the effectiveness of current strategies. Does caloric intake need to be reduced with a more aggressive diet? Does

the intensity of the exercise program need to be increased? Without the periodic monitoring the need to change strategies to meet the goal cannot be determined.

Referring back to the minor goal of accumulating \$100,000 in wealth within five years, progress is monitored by reviewing financial statements periodically. If, as the end of the five year period draws near, an examination of financial statements indicates a deficiency in savings as a result of depressed economic conditions, the deficit can be overcome by saving additional increments of income during succeeding periods. New or modified economic strategies (reduced spending, increased savings, change of investment strategies) may need to be introduced into the blueprint.

Monitoring progress, or lack of it, is a never ending process. It is applied to major goals, minor goals and tasks. It needs to be continued during good times and bad. Routine monitoring of an individual's personal and professional financial, physical and emotional success allows for minor adjustments that are easier to accomplish than waiting until a disaster occurs requiring a major life adjustment. Tweaking financial strategies noticed after observing a minor reduction in savings is more manageable than realizing after 30 years of working and personal overspending one cannot afford to retire. Losing a few pounds after a winter of inactivity is more manageable than managing a heart attack brought on by years of physical and dietary neglect. Dealing with minor personal conflicts is easier to manage than a major emotional breakdown. Monitoring progress minimizes veering off the road to success.^{14,15}

Conclusion

As previously stated, life is a journey. If you're willing to let life take you anywhere it wants, every road you take will get you nowhere. Visualizing your goals and creating a blueprint to achieve them will lead you to the shortest road to success.

Hopefully, this course inspires you to incorporate these strategies and your blueprint will shortly be in place. You'll be on your way to developing successful personal and

professional lives. A personal life filled with financial security and good physical and emotional health. Having a practice that is financially successful and provides the dentist, staff and patients with an enjoyable professional environment. An environment where the dentist and staff look forward to work. Where patients look forward to coming

to the practice. Where the dentist has time to take off and do the things he/she really want to do. A practice that allows the dentist and staff to satisfy their emotional and financial needs.

The course began with a collection of success definitions. It concludes with a definition which is especially applicable to dentistry:

SUCCESS

To laugh often and much;

To win the respect of intelligent people and the affection of children;

To earn the appreciation of critics and endure the betrayal of false friends;

To appreciate beauty, to find the best in others, to leave the world a bit better, whether by a healthy child, a garden patch or a redeemed social condition;

To know even one life has breathed easier because you have lived.

This is to have succeeded.

-attributed to
Ralph Waldo Emerson

Course Test Preview

- 1. The achievement of *Total Success* is dependent on an individual's _____.**
 - a. financial success
 - b. physical success
 - c. emotional success
 - d. All of the above.
- 2. Pareto's Principle is best illustrated by the statement:**
 - a. Individuals fail to take action unless a life changing event occurs.
 - b. 80% of a person's results are generated by 20% of a person's effort.
 - c. Unmet needs motivate people to act.
 - d. Individuals with well-defined goals are twice as likely to achieve success.
- 3. A trait not necessary to achieve success is _____.**
 - a. higher education
 - b. passion
 - c. persistence
 - d. communication skills
- 4. There are ____ steps involved in creating a *Blueprint for Success*.**
 - a. 5
 - b. 6
 - c. 7
 - d. 8
- 5. The first step in creating a *Blueprint for Success* is to _____.**
 - a. visualize your goal
 - b. identify obstacles
 - c. discover who you are
 - d. establish your timetable
- 6. Success values are best defined by _____.**
 - a. the amount of accumulated wealth an individual needs to retire
 - b. an individual's principles and beliefs
 - c. an individual's emotional needs
 - d. All of the above.
- 7. When defining success values, _____.**
 - a. choose values you think others would want you to pick
 - b. look to outside sources and adopt those values
 - c. choose values that feel comfortable
 - d. B and C
- 8. Another term (or analogy) for an emotional need that is used in the course is _____.**
 - a. hunger
 - b. value
 - c. praise
 - d. recognition

9. **Emotional needs can be characterized by the need to _____.**
- a. receive
 - b. feel
 - c. be
 - d. All of the above.
10. **A question an individual asks when embarking on a *Journey to Success* is?**
- a. What do I want?
 - b. What will it cost?
 - c. How long will it take?
 - d. All of the above.
11. **To determine the starting point of a *Journey to Success*, an individual should _____.**
- a. visualize goals
 - b. validate goals
 - c. complete a personal life and professional life assessment
 - d. A and B
12. **The *Total Success Wheel* _____.**
- a. illustrates an individual's strategies for success
 - b. is a graphic representation of how assessment scores relate to each other
 - c. determines the time it takes to achieve a goal
 - d. varies with the goals individuals choose
13. **When defining a goal, _____.**
- a. it is stated as a positive statement
 - b. it is stated in the present or future tense
 - c. it has a defined date of completion
 - d. All of the above.
14. **If you are unable to visualize a goal, _____.**
- a. it is permissible to ignore the process
 - b. import an image from an outside source
 - c. seek assistance from family and friends
 - d. consult with professional advisors
15. **Validating goals _____.**
- a. allows an individual to stay focused on achieving goals
 - b. gives credibility to a goal
 - c. allows for quicker achievement of the goal
 - d. A and B
16. **By comparing a desired goal to the present state, _____.**
- a. the amount of effort, time and resources required to complete the goal can be calculated
 - b. the resources an individual possesses can be evaluated
 - c. an individual has a clearer picture of the outcome
 - d. A and B

- 17. Establishing a time table _____.**
- a. provides a sense of urgency to achieving a goal
 - b. is the same for all goals
 - c. is not necessary for long term goals (greater than 25 years in the future)
 - d. is not necessary for short term goals (less than 1 week)
- 18. The order of the steps for creating a plan to achieve goals are:**
- a. Define major goals, then minor goals, then tasks.
 - b. Define tasks, then minor goals, then major goals.
 - c. Define minor goals, then major goals, then tasks.
 - d. Define major goals, then tasks, then minor goals.
- 19. The intended date of completion for a major goal must be attained before the intended date of completion of a minor goal.**
- a. True
 - b. False
- 20. The monitoring of progress is _____.**
- a. not necessary during rapid progress toward achieving a goal
 - b. only necessary for major goals
 - c. necessary for major goals, minor goals and tasks
 - d. A and B

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About the Author

Steven Schwartz, DDS



The P&G team wishes to express its sadness over the loss of our colleague and friend, Dr. Steven Schwartz, who passed away on October 25, 2018. He was a tremendous help in impacting thousands of dental professionals through CE, making dentalcare.com one of the best CE providers in the world. He was a wonderful person! We will miss him.

Dr. Steven Schwartz was the former director of the Pediatric Dental Residency Program at Staten Island University Hospital and was a Diplomate of the American Board of Pediatric Dentistry.