



PRACTICE OWNER SUMMIT

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IMPORTANT LINKS

ROOM LINKS *Password for all sessions is: Owner*

Gold Ballroom: <https://www.unchartedvet.com/goldballroom>

Furman Room: <https://www.unchartedvet.com/furmanroom>

Poinsett Ballroom: <https://www.unchartedvet.com/poinsettballroom>

Alexander Room: <https://www.unchartedvet.com/alexanderroom>

Card Room: <https://www.unchartedvet.com/cardroom>

NAVIGATION GUIDE

Eastern Time: www.unchartedvet.com/easternguide

Pacific Time: www.unchartedvet.com/pacificguide

DIRECTORY

Information Submission Link: www.unchartedvet.com/PODirectoryInfo

Directory: www.unchartedvet.com/PODirectory

SCHEDULE OF EVENTS

Thursday, December 3, 2020

6:00pm-7:00pm	Networking Happy Hour	<i>Gold Ballroom</i>
7:00pm-8:00pm	Opening Ceremony	<i>Gold Ballroom</i>
8:00pm-8:45pm	Choose Your Own Adventure	<i>Gold Ballroom & Breakout Rooms</i>
8:45pm-9:45pm	Keynote, <i>Andy Roark</i> True & False Fear: Preparing for 2021	<i>Gold Ballroom</i>
9:45pm-11:30pm	Optional: After Banquet Happy Hour	<i>Gold Ballroom</i>



**Times are in EST*

Friday, December 4, 2020

11:00am	Opening Remarks, <i>Andy Roark</i>	<i>Gold Ballroom</i>
11:10am	Keynote, <i>Phil Richmond</i> Power-Up Your Practice Culture	<i>Gold Ballroom</i>

12:00pm - 12:20pm **Stretch Break** sponsored by **VETSOURCE™** *Gold Ballroom*

12:20pm - 2:10pm **Workshops and Lectures**

Gold Ballroom Strategic Practice Marketing and Growth
- *Bill Schroeder*

Poinsett Ballroom Living the Dream: Can You Have Your Cake and Eat It Too?
- *Stephanie Goss*

Furman Room Smells Like Team Spirit – Creating and Maintaining a Positive Team
- *Jenn Galvin*

Alexander Room Discussion Space

2:10pm - 2:30pm **Mindset Reset** sponsored by  **Boehringer Ingelheim** *Gold Ballroom*

2:30 pm - 3:30pm **Choose Your Own Adventure** *TBA*

3:30pm - 4:00pm **Stretch Break** sponsored by  **ROYAL CANIN™** *Gold Ballroom*

4:00pm - 5:00pm **Choose Your Own Adventure** *TBA*

5:00pm - 5:30pm **Mindset Reset** sponsored by  **inTouch Practice Communications** *Gold Ballroom*

5:30pm - 6:30pm **Choose Your Own Adventure** *TBA*

6:30pm - 8:00pm **Sponsor Night In** *TBA*



**Times are in EST*

SCHEDULE OF EVENTS

Saturday, December 5, 2020

10:30am-11:00am	Pajama Breakfast	<i>Gold Ballroom</i>
11:00am-11:15am	Morning Remarks	<i>Gold Ballroom</i>
11:15am-12:15pm	Discussion Groups	<i>Gold Ballroom</i>
12:15pm-12:30pm	Stretch Break	<i>Gold Ballroom</i>
12:30pm-1:30pm	Group Feedback	<i>Gold Ballroom</i>
1:30pm-2:00pm	Closing Remarks	<i>Gold Ballroom</i>
2:00pm	Tribe Goodbyes!	<i>Gold Ballroom</i>



**Times are in EST*

**THANK YOU TO OUR 2020
PRACTICE OWNER SUMMIT SPONSORS**



ROYAL CANIN®

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**Boehringer
Ingelheim**

Strategic Practice Marketing and Growth

BILL SCHROEDER

I have spent quite a bit of time over the last 25 years speaking with practice owners about how to grow their practice and how to be successful within the world of digital marketing. All too often I find myself speaking with practices that are underwhelmed by the results they receive from their current plan and effort. Unfortunately, the common thread that runs through many of these conversations is the lack of a plan. For that reason I am very excited to speak with you about developing an effective digital marketing strategy.

If you've seen me speak before, you have heard tips and tricks and possibly even have received 'how to lessons' when it comes to tackling a certain aspect of digital marketing. This course will be different in that I understand that as a practice owner most of you will not have the time to hit the keys on the keyboard or execute most of the digital marketing strategy concepts I will discuss. For that reason I will focus on how to manage this process from an owners standpoint. These notes will be designed to guide the conversation and act as a reference point following the session, however the real meat and potatoes will be delivered through a discussion during the session.

I'll start first by asking a question... "How many of you have a digital marketing plan in place that has been validated and included in the processes that run your practice to the point where you literally stop in your tracks and refer to the plan before proceeding with any marketing or strategy change?" If my experience holds true, most don't have a validated plan or they have a plan that has not been revisited in quite some time. Here lies the first opportunity as many of your peers failed to take this step as well. You'll find that the last step in my suggested process is to schedule a time to revisit this every year.

To guide us along this journey, my team and I have assembled 10 easy to follow stops that should be a part of every digital marketing strategy.

Goalsetting

Managing any digital marketing plan without understanding the goals for each component of the plan would be as frustrating as starting a journey without knowing where are you are going. The same frustrations would exist in that it would be difficult to know when you've gotten to your destination and the efficiency of the trip. It is very important to understand the specific aspects of your practice that cause the desired growth. These key performance indicators can be built into a digital marketing plan and tracked so that all efforts are pointed towards future success. During the session we will discuss the industry's most common key performance indicators and reveal some strategies my team and I have utilized to maximize opportunities and increase performance where needed. This focus becomes a very targeted data conversation that should be had within your practice and with your digital marketing people on a very regular basis.

Strategic Practice Marketing and Growth

BILL SCHROEDER

Market Research

Understanding who your audience is and who they need you to be can be a very important factor in the success of a digital marketing plan. When is the last time that you surveyed the market or simply had conversations with people within your practice about who they need you to be? The digital world that we live within allows us to communicate with current and potential clients very easily via the use of survey tools and market research software. This view often allows for adjustment or confirmation of direction so that you understand that you are on the right track. Many successful practices review their market on a regular basis to uncover opportunities for growth. We will discuss some modern techniques and review some very unique software that allows for this to be an easy part of your digital strategy.

Involve the Team

While I have never seen team engagement as high as in practices within the uncharted community, there are still opportunities to improve team communication/involvement and reap the benefits of such. I recently had the pleasure of guiding a practice through a SWOT analysis. It was a situation whereby they hadn't performed one since they created their original business plan, 10 years ago. They reluctantly came to the table (almost rolling their eyes) to participate in such a "basic" process. In the end, this turned out to be a very successful exercise in that we involved the entire team in the process. The original analysis that was done involved only the principles of the practice and was created mainly for their lender. In fact, the practice owners confessed that they couldn't even remember the results of the initial exercise. My suggestion to you is to revisit this process, involve most of your team, and integrate the findings into the day to day operations of your practice. This includes providing a clear understanding of how each team member can contribute to the success of the practice meeting its goals on a day to day basis.

Monitor the Competition

Do you know who your true competition is? Sure, physical location and historical dealings with practices within the market may yield some information along these lines however when is the last time you looked at it from a pet owner or Google's point of view? During our session we will take a look at how you can identify, monitor, and evaluate the current positioning and efforts of competing practices.

Content Marketing

is and always will be a content game. Most practices understand this but do you actually take the step of creating and following a digital marketing content calendar? During the session we will explore which content is most valuable and how to use modern technologies to maintain such. Without a well-developed content calendar success is almost accidental.

Strategic Practice Marketing and Growth

BILL SCHROEDER

Re-Engagement

One of the benefits of working within the digital space is the availability of data. This data can be used by practices like yours to identify when clients leave the conversion funnel process. During this session, we will identify how lucrative the process of re-engaging these prospects can be as well as some examples of good regathering content.

Email and Text Marketing

It has long been said that developing and maintaining a practice email list is of great importance. Building and maintaining a relationship with your current and prospective client base has never been more important than it is today. During our session we will examine technologies that make this simple and will review techniques that allow practices like yours to develop a system that allows for ongoing, nurturing conversations that ultimately yield a loyal, more compliant client base.

PPC and SEO

While these subjects could themselves be the center of many hours of education, it is important that we stop and identify the benefits of each. Many practices struggle with finding a balance between generating organic content and that which should be reserved for paid search. In preparation for this session, my team and I have taken a look at 100 successful practices and have developed a list of the techniques they have in common. Many of them are easy to understand and implement immediately. We will share our findings during the session!

Measurement

If you've seen me speak in the past you have heard me speak about conversion. For me, conversion is the center point of evaluating whether or not your marketing efforts are making a difference. While your practice might have slightly unique needs, we understand that most practices depend heavily upon an increase in telephone calls, requests for appointments, and new clients. While these are just examples, it should be noted that all efforts must have a purpose and this purpose must be tracked by monitoring the number of desired actions. We will share tips and tricks for increasing conversion and monitoring such so that you can truly understand what is working and what is not.

Scheduled Analysis

As I mentioned earlier, a key component to developing any successful digital marketing strategy is to have a planned review of such on a regular basis. The world of digital marketing changes very quickly, sometimes what is working one month will no longer work the next. By approaching this with an open mind and reviewing on a regular basis, you can dramatically reduce the risk of utilizing dated, ineffective techniques while your competitors are capitalizing on new opportunities.

I look forward to speaking with you soon and hope that you remain happy and healthy! Let's do this.

Smells Like Team Spirit - Creating and Maintaining a Positive Team

JENN GALVIN

None of us were prepared for 2020. We witnessed fires, floods, violence, a pandemic, a divided country – oh and don't forget the murder hornets. It's been a challenge to create and maintain positivity in ourselves and our team. In this workshop we'll review the things you need to do to be a happier, positive leader and how to build, manage and reinforce positivity in your team. I can't wait to see you there!

It's been hard to find any good stuff in all this mess, but guess what guys? Good stuff happened! While many of us, and our employees, were focused on the freak year that 2020 has been a 103 year old celebrated beating COVID-19 with a beer, Amazon made new boxes that can be turned into cat forts, and Crayola launched diverse skin colors in their updated crayon set.

You're the leader and in this new reality of COVID 19, triggered clients, and being mega busy you are tasked with finding a balance between being an owner, managing your team and doing your actual job every day.

It all starts with you. You have a lot to do with how the people on your team feel. Emotion is contagious and the vibe you put out during the work day will influence your team. You are in charge of setting the tone. The way you enter the clinic is an indication to your staff about how the day will go. Be conscious of how you act. Monkey see, monkey do.

So how can we be more positive when there's so much stress? Let's take a look outside of work for a moment. How is your health? What's home life like for you and your family? How are your relationships with family and friends? Are there any unfinished projects or deadlines outside of work that need completing? How are you eating? How are you sleeping? Even when shit is hitting the fan you can do things to feel a bit better. Here are some tips:

- Stop hyper-focusing on stressful stuff that you have no control over.
- Meditate (or not).
- Appreciate the small things in life.
- Clean up (or not).
- Take some time off from social media and the screen in general.
- Laugh.
- Don't obsess about being positive. What the hell Jenn, you just said I should be more positive! Well yes, there are ways to work toward being more positive. Being mindful and taking action is different than obsessing. Going back to the first point – don't hyper focus. "I must be happy" is not healthy. Let's pick one thing off this list and slowly add to it.

Smells Like Team Spirit - Creating and Maintaining a Positive Team

JENN GALVIN

If you're not sure where to start, I'd recommend a daily exercise in positive psychology.

Dr. Sandi Mann, a Psychologist and expert in emotions (especially in the workplace), advocates keeping a daily journal. Focusing on small things can improve your mood and help us find more happiness in life. (1)

1. What experiences, however mundane, gave you pleasure?
2. What praise and feedback did you receive?
3. What were the moments of pure good fortune?
4. What were your achievements, however small?
5. What made you feel grateful?
6. How did you express kindness?

Okay, now we've got you in a better headspace, what about your team?

- Get to know the folks you work with.
- You're the role model and your behavior encourages others to act the same way
- Treat your team with respect and empathize with them.
- Vanilla Ice was on to something - stop, collaborate and listen - workplaces do best when everyone contributes and everyone feels heard.
- Team building is essential to a thriving workplace. Remember when I said you need to get to know your team? They will also perform better and be more empathetic to one another if they know each other.

Small things you can do to make each team member feel good:

- Say thank you - maybe it's a high five, thank you note, favorite candy or a mention on the employee thumbs-up board. Try and be as specific as possible.
- Learn about and know your team and their personalities. A gesture that means the world to one person might not mean much to another.
- Dance parties.
- Get your team to make a positivity jar/board together.
- Feed your people and make sure they are sleeping. I can't stress this enough. Minds function better when they are fueled. Without sleep thinking clearly is impossible.
- Leave the practice.
- Be a little bit of a parent.
- Celebrate with your team.
- Be a dork.
- Reach out to your reps for swag.
- Show your pride.

1. <https://www.bbc.com/future/article/20200317-covid-19-how-to-stay-happy-during-the-coronavirus-outbreak>

Smells Like Team Spirit - Creating and Maintaining a Positive Team Worksheet

JENN GALVIN

We're going to review things you can do to be a happier, more positive leader and how to build, manage, and reinforce positivity in your team.

Toolkit

Take Better Care of Yourself

- Choose one or two things to implement
- Use what works for you
- Prioritize yourself



Take Better Care of Your Team

- Take a genuine interest in your employees
- Be a role model
- Respect your team and hear them out
- Say a specific "thank you"
- Talk to them about self care

Team Building

- Make it different each time
- Make it a positive experience
- Be a dork
- Celebrate wins
- Show your pride



Workshop Tasks

Exercise 1: Discuss what you can do to take better care of yourself.

Exercise 2: Discuss what you can do to take better care of your team.

Exercise 3: Come up with the first team building exercise you're going to try.

Power-Up Your Practice Culture

PHIL RICHMOND

We all want a great practice culture, but where do we start? There is fantastic news! You only have to make sure one person is on board first — you. When leaders are fully invested crafting culture in themselves, the practice follows.

LEARNING OBJECTIVES

- Assessing character strengths, discovering our top 5 strengths (signature strengths) and how to implement them in our work life.
- Learning vulnerability, psychological safety, and the importance of high-quality connections (HQCs).
- Discuss job crafting, values assessment and team priorities.

1. KNOW YOUR STRENGTHS. BE AUTHENTIC (TO THINE OWN SELF BE TRUE)

2. BE VULNERABLE IN WORK RELATIONSHIPS

3. WHAT'S YOUR WHY?

Power-Up Your Practice Culture Worksheet

PHIL RICHMOND

Objectives

1. Assessing character strengths, discovering our signature strengths.
2. Learning vulnerability, psychological safety, and the importance of high-quality connections (HQCs).
3. Discuss meaning and purpose.

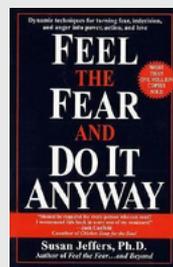
Toolkit

VIA Character Strengths survey/using your signature strengths

- viacharacter.org (take the free survey)
- Gallup: CliftonStrengths assessment for business
- 340 ways to use character strengths:
https://www.actionforhappiness.org/media/52486/340_ways_to_use_character_strengths.pdf

Check your shame triggers/ know your fears

Susan Jeffers:
"Feel the Fear
and Do It
Anyway"

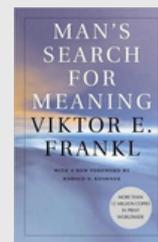


Brene Brown:
"Dare to Lead,"
shame triggers

Amy Edmonson's work
on psychological safety

Job crafting/Purpose work

- Job, Career or Calling?
Differences
- Purpose as a verb
- Viktor Frankel:
"Man's Search
for Meaning"
- David Brooks
TED talk
(resume or eulogy)
- Dan Pink: Autonomy,
Mastery, Purpose



Key Points

1. Strengths-based perspective
2. Psychological safety — key to successful teams
3. Purpose is an action word. It's what you do to show up positively in the world

Power-Up Your Practice Culture Worksheet

PHIL RICHMOND

RANK YOUR STRENGTHS

Go through the list of strengths and definitions.
Put a * star * next to the strengths that most resonate with you.
Then circle the top 5 that you believe describe you best.

	Strength	Strength Description
	Appreciation of beauty and excellence	Appreciation of beauty and excellence [awe, wonder, elevation]: Noticing and appreciating beauty, excellence, and/or skilled performance in all domains of life, from nature to art to mathematics to science to everyday experience.
	Bravery	Bravery [valor]: Not shrinking from threat, challenge, difficulty or pain; speaking up for what is right even if there is opposition; acting on convictions even if unpopular; Includes physical bravery, but is not limited to it.
	Citizenship	Citizenship [social responsibility, loyalty, teamwork]: Working well as a member of a group or team; being loyal to the group; doing one's share.
	Creativity	Creativity [originality, ingenuity]: Thinking of novel and productive ways to do things; Includes artistic achievement, but is not limited to it.
	Curiosity	Curiosity [interest, novelty-seeking, openness to experience]: Taking an interest in all of ongoing experience; finding all subjects and topics fascinating; exploring and discovering.
	Fairness	Fairness: Treating all people the same according to notions of fairness and justice; not letting personal feelings bias decisions about others; giving everyone a fair chance.
	Forgiveness	Forgiveness and mercy: Forgiving those who have done wrong; giving people a second chance; not being vengeful.
	Gratitude	Gratitude: Being aware of and thankful for the good things that happen; taking time to express thanks.
	Hope	Hope [optimism, future-mindedness, future orientation]: Expecting the best in the future and working to achieve it; believing a good future is something that can be brought about.
	Humor	Humor [playfulness]: Liking to laugh and joke; bringing smiles to other people; seeing the light side; making (not necessarily telling) jokes.
	Honesty & Integrity	Integrity [authenticity, honesty]: Speaking the truth but more broadly presenting oneself in a genuine way; being without pretense; taking responsibility for one's feelings and actions.
	Judgment	Judgment [open-mindedness, critical thinking]: Thinking things through and examining them from all sides; not jumping to conclusions; being able to change one's mind in light of evidence; weighing all evidence fairly.
	Kindness	Kindness [generosity, nurturance, care, compassion, altruistic love, "niceness"]: Doing favors and good deeds for others; helping them; taking care of them.

Power-Up Your Practice Culture Worksheet

PHIL RICHMOND

	Strength	Strength Description
	Leadership	Leadership: Encouraging a group of which one is a member to get things done and at the same maintain time good relations within the group; organizing group activities and seeing that they happen.
	Love	Love: Valuing close relations with others, in particular those in which sharing and caring are reciprocated; being close to people.
	Love of learning	Love of learning: Mastering new skills, topics, and bodies of knowledge, whether on one's own or formally. Obviously related to the strength of curiosity but goes beyond it to describe the tendency to add systematically to what one knows.
	Modesty & Humility	Modesty and humility: Letting one's accomplishments speak for themselves; not seeking the spotlight; not regarding oneself as more special than one is.
	Persistence	Persistence [perseverance, industriousness]: Finishing what one starts; persisting in a course of action in spite of obstacles; "getting it out the door"; taking pleasure in completing tasks.
	Perspective	Perspective [wisdom]: Being able to provide wise counsel to others; having ways of looking at the world that make sense to oneself and to other people.
	Prudence	Prudence: Being careful about one's choices; not taking undue risks; not saying or doing things that might later be regretted.
	Self-regulation	Self-regulation [self-control]: Regulating what one feels and does; being disciplined; controlling one's appetites and emotions.
	Social intelligence	Social intelligence [emotional intelligence, personal intelligence]: Being aware of the motives and feelings of other people and oneself; knowing what to do to fit in to different social situations; knowing what makes others tick.
	Spirituality	Spirituality [religiousness, faith, purpose]: Having coherent beliefs about the higher purpose and meaning of the universe; knowing where one fits within the larger scheme; having beliefs about the meaning of life that shape conduct and provide comfort.
	Zest	Zest [vitality, enthusiasm, vigor, energy]: Approaching life with excitement and energy; not doing things halfway or halfheartedly, living life as an adventure, feeling alive and activated.

1. What does each of your signature strengths mean to you?
2. How do these strengths show up for you at work?
3. Reflect on a challenge you are facing at work or in life, how can you use your strengths?
4. Have your team take the VIA Character Strengths assessment or use this handout. Have them answer the same questions. *If taking the VIA, emphasize the top 5 (or top 8-10 if it feels right to them). Everyone wants to look at the lowest ranked strength (mine is humility, btw). This is our negativity bias at work. Focus on individual and team strengths.
5. Strength map the group: have each team member guess the top 3 strengths for the others and share why they think that is.

Power-Up Your Practice Culture Worksheet

PHIL RICHMOND

PSYCHOLOGICAL SAFETY/BELONGING

Creating a foundation for psychological safety can start with how we listen and respond. Somewhat counterintuitively, relationships are most strengthened by how we respond to good news, not bad news. We should try our best to respond in an active, constructive manner. With the examples and descriptions below, how might you respond to a team member telling you exciting news about a new position at their second job?

Active Constructive Responding (ACR)

Active Constructive:

"That is wonderful! I am so happy for you. You will do great! How did you earn it?"

Responding enthusiastically; maintaining eye contact, smiling, displaying positive emotion.

Passive Constructive:

"That's nice that you are being considered."

Happy, but lacking enthusiasm/downplaying; little to no active emotional expression.

Passive Destructive:

"A promotion, huh? Well, hurry up and premed the next patient. I'm starving."

Lacking interest; displaying little to no eye contact, turning away, leaving the room.

Active Destructive:

"If you take this, you are going to have to be busy every night and on Saturday mornings too."

Pointing out the downside; displaying negative nonverbal cues.



Living the Dream: Can You Have Your Cake and Eat It Too?

STEPHANIE GOSS

The reality is most of us are trying to have our cake and eat it too. We are trying to be veterinarians, managers, bosses, husbands, wives, parents, pet parents... all things to all people. We fail, we feel guilty, we work harder to try and make up for it. Rinse and repeat. We are going to talk about how to decide where to put your energy so that you are enjoying what you are doing, leveraging your talents and finding the yin to your yang for the rest of it.

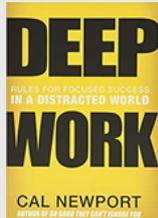
Objectives

- Learn how to figure out what needs to be on your plate.
- Figure out what you need to outsource to professionals.
- Decide what your team can tackle.
- How to budget for outsourcing and where to find the money to pay for it.
- Devise a plan for how to work on your business, not just in your business.

Toolkit: Book List



1. Checklist Manifesto, Atul Gawande



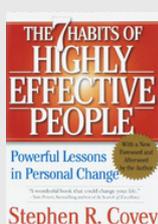
2. 168 Hours: You Have More Time Than You Think, Laura Vanderkam

3. Make Time: How to Focus on What Matters Every Day, Jake Zeratsky and John Knapp



4. Deep Work: Rules for Focused Success in a Distracted World, Cal Newport

5. Getting Things Done: The Art of Stress-Free Productivity, David Allen



6. Organize Tomorrow Today: 8 Ways to Retrain Your Mind to Optimize Performance at Work and in Life, Dr. Jason Selk and Tom Bartow

7. Eat That Frog!: 21 Great Ways to Stop Procrastinating and Get More Done in Less Time, Brian Tracy

8. The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change, Stephen R. Covey

Living the Dream: Can You Have Your Cake and Eat It Too?

STEPHANIE GOSS

**What are the things
only you can do?**

**What are the things you
love doing - they give
you passion and
excitement for your job?**

**What are all the other
things you have on
your to do list?**