

## Ep #216: Lisa Mergens - Dentistry is Not a Solo Act



### **Full Episode Transcript**

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**Dr. David Phelps**

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## **Ep #216: Lisa Mergens - Dentistry is Not a Solo Act**

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David Phelps: Good day, everyone. This is Dr. David Phelps of the Freedom Founders Mastermind Community and Dentist Freedom Blueprint Podcast. Today, I give you an insight to a conversation that was not meant to be recorded and put out for the public, but we decided we could because it was actually that good and that interesting.

My guest today is Lisa Mergens of Ascendant Dental Development. Lisa's out of Chicago. she's got a really interesting and compelling story, I think, you all like to hear from a downturn in her life to what she did to turn adversity into opportunity, and who she is today. She is really doing a lot of great work in the niche of leadership within dentistry. I want you to hear her story. She gave me permission to do that so here you go.

You're based out of Chicago. You went to Northwestern. From Northwestern, did you get into dentistry like soon right away or did you do some other stuff?

Lisa Mergens: Yeah, no. Actually, I started working in a dental office at 16 for my dentist because it paid more money than working at McDonald's. So he told me, one day, "Lisa, you should be a dental assistant because when you go away to college, you'll always have a job, and it will pay you more money than McDonald's." He was Dr. Kushner. So I said, "Okay Dr. Kushner."

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David Phelps: What's his first name?

Lisa Mergens: Allen. Allen Kushner.

David Phelps: Allen Kushner, okay.

Lisa Mergens: Yeah, you're thinking of Steve Kushner.

David Phelps: I'm thinking of Rick Kushner, but that's okay.

Lisa Mergens: I mean Rick, Rick, yeah, yeah.

David Phelps: That's okay.

Lisa Mergens: Yeah. So I ended up ... I went to Northwestern and quite frankly, I had every intention of going to medical school, but I was an inner city kid, no money, and certainly couldn't afford Northwestern, but I did it. So, they have the dental school and I thought, "Well, this just makes sense. I can do the dental hygiene program." Pay off some of my student loans, and then go to medical school. Except you got married, you had a few kids.

David Phelps: Yeah, the course takes a turn, doesn't it? Yes.

Lisa Mergens: Exactly. Yeah, exactly. Now, that my kids are older, and so that's what sent me back to school. Why not take on more debt?

David Phelps: Well, that's the world that we're living today. I was like, "What's a couple hundred grand?" It's a drop on the bucket, right?

Lisa Mergens: Well, exactly. Two of my kids are at Iowa. I've got another one headed there next year. So I'm paying out-of-state tuition times three plus a PhD. You do the math.

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David Phelps: Wow! Yeah, no kidding. All right. So, during the years that your family was growing, you were in hygiene?

Lisa Mergens: So, I did. I practiced hygiene until 2007. Then, I actually ... This is not a story I share all over the place because I don't need a sob story, but I got diagnosed with a very, very debilitating form of rheumatoid arthritis. Literally, was working on a patient and my hand stopped working. Within a month, I was bedridden.

The first couple of years were very hard, but you still have a family, you still have to be mom, you still have to do things. So every once energy once taking care of them. Then once I got to a little bit more of a managed place, I couldn't do hygiene. I couldn't use ... I still couldn't function that way. So, I went back to school and I got a business degree in marketing. I was able to work without having to use my hands. I did a lot of course planning, special event planning, marketing, that kind of stuff.

About three years ago, and a lot of it was around dentistry, but also in the non-profit sector. I was going in and out between different industries. Then three years ago, March 23rd, so five days ago, it was three years ago, I went into full remission.

David Phelps: Five years ago, full remission.

Lisa Mergens: Three years ago.

David Phelps: Three years ago, three years ago.

Lisa Mergens: Yeah. I went to full remission, and I got my life back.

David Phelps: Well. Yeah, so help me a little bit, arthritis, when we talk arthritis, auto-immune disease, yes? Yes.

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Lisa Mergens: Yes, yes.

David Phelps: So, just from my background, I know something but not to the depth that you would know, of course, dealing with it from personal basis. Number one, managing it. That's a big word, manage, because what does that mean? I mean that means different things to different people depending upon what degree you're dealing with it. So, manage. But how do you ... how is one able to go into remission? How was that?

Lisa Mergens: So here's the thing, David. Nothing worked for me. I was taking anywhere between 16, 18 milligrams of Prednisone a day.

David Phelps: Oh man!

Lisa Mergens: Plus, I was getting all the rheumatoid arthritis drugs, none of them worked on me. I ended up having to have the same chemotherapy that they give to patients with lymphoma every month, plus I was getting deep-

David Phelps: Methotrexate and-

Lisa Mergens: Well, that I took weekly, but no, I was taking Rituxan. I was getting the big cocktails every month.

David Phelps: Dang!

Lisa Mergens: That was just so I could walk from here to my door.

David Phelps: You were managing a family and going to school, oh, my gosh.

Lisa Mergens: Well, so here's the thing. It's really truly a mindset thing. There is a rabbit hole that we can all fall down in moments of despair. But climbing out of that rabbit hole is

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really hard. So occasionally, I'd let myself peek down it, but I knew that if I went down the rabbit hole of poor me, and always me, and my life is horrible, whatever, if I went down that rabbit hole, I knew that climbing out was gonna be hard and my kids needed me. I never did. Necessity breeds invention and reinvention. So, it was looking to find things that worked for me. That's it.

But when I got my life back three years ago, I ended up getting into a clinical trial down at Northwestern where they basically identified a bunch of cells that were in the lining of the stomach, and they were doing ... causing the auto-immune reaction. So I got into the study, they basically took out a bunch of lining in my stomach, re-engineered things and gave it back to me. I've been fine.

David Phelps: Wow.

Lisa Mergens: Yeah. I don't know where they're at with the studies. I don't know if it worked for anyone else. All I know is that it was almost instantaneous.

David Phelps: Wow. So, here's the thing that you and I both know in talking about your story and the major turn that coming down with rheumatoid arthritis caused you, which again as you said you completely feel like you're in a hole, like, "Why me? Life's not fair." All that phased up. We know you can't stay there, so you don't. So, you make a shift, a shift that had you not had to go through this debilitating disease, you would have stayed the course, you would have stayed hygiene, most likely now. Not saying when your kids grow up, you might have still done something different, got that, but you would've stayed that course.

Now, it forced you to make a big change, a big shift, got you way when you're already uncomfortable, physically,

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very uncomfortable. You're right. So, now you had to become even more uncomfortable, but do something you felt like you had to do because you're not gonna just sit around but pity yourself, you can't do hygiene. Financially, I gotta ask you, so you're going from making a pretty good income as a hygienist to paying out dollars for school. What kind of stress did that put on the family unit?

Lisa Mergens: Oh, Jesus, it was horrible, it was horrible because not only was I making good money as a hygienist, I was making ridiculous money as a hygienist because you've gotta realize that up until 2007, so from 2001 to 2007, those were really good years definitely. Mark in the PPO mind like we are now.

I went and took a job at a practice, who it was a day and a half a week was all he could afford to have me come in. I just saw a lot in this young guy. I knew I could do a lot for him. Clinically, I have no problem saying I was an amazing clinician. I really was. I had a great rapport with patients. I had that office, and it was a startup. I had that office in full-time hygiene within six months.

David Phelps: Well, we have at least two podcasts here, so my mind's going, my mind's working here. So that's why I like to do this ahead of time to really get to know you better because all of this-

Lisa Mergens: Yeah, I know. Yeah.

David Phelps: Yeah. So I'm thinking right now the first podcast is gonna be on this. I think the second podcast will be on what you're doing amazingly in dentistry. I think there's two ... which I do it in 30 minutes. That's not gonna be good. We got to really flesh this out. So here's one of the things that really comes to my mind. Again, you're making good

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money. Between you and your husband, you're making darn good money. So I get that. Not at all different from any of our dental colleagues who ... again, there's a wide range. But still, let's say, relatively on average, you're making good money. Right?

They'll keep doing the same thing in their practice. They won't invest anymore in themselves or the practice, bring someone like you in, but whine and complain, right, whine and complain. You didn't have that luxury to whine and complain. You said, okay, no I got to make a change.

Now, I'm not saying that dentists that are whining and complaining, they are going through anything like you are because the physical pain and torment that you're dealing with is huge. There's some that may be dealing with stuff like that, but I'm just talking about the PPO stuff, "I can't deal with my staff," and whine, whine, whine, whine, whine, but they won't do anything about it. Here's you and your dentists. You're both putting your heads together going, "We combine forces here and the pie is not zero on some game. If I'm paying Lisa, her assistant, it's like, no, the pie gets bigger and the patients are treated better." It's like they don't think that way, right? Too many who don't.

Lisa Mergens: Well, yeah. They have that scarcity mindset.

David Phelps: Yes, yes. It drives me crazy. I know I'm sure it drives you crazy when the people reach out to you and is like, "Well, how much is it gonna cost?" And they're just like, "Oh, my gosh!"

Lisa Mergens: The funny thing is, David, I'm not expensive. I get yelled at, believe me. I get yelled at all the time because I probably way undervalue myself.

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David Phelps: Yeah, I'm sure you do.

Lisa Mergens: I really truly do. I've got to get past that. My thing was just I just needed to reach as many people to effect as much change. I'll back up a little bit, and I'll let you go back. When I got better three years ago, I knew I wanted to go full force back into dentistry, I just didn't know how because dentistry is my love. I stayed in it all these years.

So, I ended up working in two different places that the culture, not doing hygiene, but I was doing new business development for a large implant company like an all-on-board type place. Anyway, the Texas city was so bad. The terror was so bad. It caused me to have a bleeding ulcer. It had to be surgically repaired by my doctor, seriously. That's how bad it was. Anyhow, but what I saw was that the cultures ... I had been in good practices and I had been in cruddy practices. What I found was that the cultures hadn't changed and the leadership hadn't changed from 1984, and the communication.

The first thing I did was I went and I found a communication training style that I loved and then I discovered positive psychology. I just started searching more and more and more. It just led me over the course of the last three years down this path to where I went, and I went through the process of becoming certified as a communication trainer and as an executive coach and a leadership coach. Then I thought, "Well, okay, being a coach is great, but I want more because I want the psychology of it, which is why I wanted to get the PhD.

That's how I ended up here. It was because of ... so everything has been a turning point in my life, has been because I saw a situation that was cruddy and thought, "There's got to be a better way." So whether it was my

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rheumatoid arthritis, whether it was paying the bills, whether it was coming back and seeing that things were not changed, and that there was room to make a difference, maybe it was the way I was brought up, maybe it was because I was an inner city kid whose parents were not college educated but who valued education, and worked hard and never told me that I would have limits.

It's funny I talked to my mom last night late. We were talking about me being back in school. She said, "Lisa, do you remember what I told you when I was little?" I said, "Mama," I said, "I absolutely do." She told me, "They can take your clothes, they can take your house, they can take your car, but they can never take what's in your mind."

David Phelps: That's right.

Lisa Mergens: So, education is everything. Whether we self-teach or we go to school, just that absorption of knowledge is so important. When I got sick ... Here's, the really cool thing. He is just a very humble man and we'd never needed things. We've never been that kind of a family. We didn't need to have flashy cars or things like that. That was never us. It was never how we lived. It was not a problem to ring back in and say, "So what if I've got a grocery budget this week of \$100 to feed a family of five." You know what, David? They ate really well because I cooked from scratch, and I baked and I ... you know what I mean? I'm not saying it got that bad, but whatever it was, you just did. We didn't miss a mortgage payment. We didn't miss a phone payment. There was never any of that.

David Phelps: Yeah, that's tremendous. You mentioned 1984. Was that when you've graduated Northwestern or?

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Lisa Mergens: No, no, no. I graduated Northwestern in '89. '84 was when I started in dentistry.

David Phelps: Okay. You know what? That's almost the year I started. I started in '83. I was pegging the date just to-

Lisa Mergens: Where did you go to school?

David Phelps: Baylor.

Lisa Mergens: Did you?

David Phelps: Yeah. I got out and started in '83, so yeah. Thanks, it takes me back. All right. So, talk to me a little bit about what's your ideal client situation today? How do you work with them? What's the format? How do you onboard somebody? How do you initially see if there's a fit? Give me some of that.

Lisa Mergens: Usually, people reach out to me. I've done very little marketing, and probably only in the last year have I even bothered to raise my awareness. That was more because I just have this need to make a change for people. So the awareness raising, bringing myself to a level where more people could see me to beat the visibility was not because of something I needed personally. It was because I felt the need to help others. The best way for me to do that was to increase my visibility.

I've been flying low under the radar. I've been very connected through dentistry with my entire career. So most of the clients that I get, really, they just reached out to me. There are people I won't work with. I do a very, very diligent onboarding process with them. I have these kinds of conversations with them. I wanna see where they're coming from. I wanna see what their pain points

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are. I always, given the opportunity, start with a communication training. I do it with their whole team.

The reason why I do that is because if people don't know how to communicate with each other, then they're not open to being coached and developed. They're not comfortable leading because they don't know that they have the right words to do it. A lot of times, they stop their momentum because they get hooked up in the thought of perfection. They think they have to be perfect. So if they can't be perfect, then they're not gonna do it.

So, they've got to learn that it's a process. I like to start with the communication because if I can get people all talking in a kind way. We've said before, I have no problem with people having a discussion where there's disagreement. It's as long as it's done respectfully.

David Phelps: Sure.

Lisa Mergens: When we understand how to talk to each other in the language that we each need, then we're meeting each other's style.

Once I get them doing that, then I go back and I actually sit and teach. So, I'm teaching the dentist leadership. I'm actually conveying the different models and how to move through the different models of leadership, and what happens if we go into this space with leadership or what happens if we go with this. Then I teach them how to keep their employees accountable, how to create that accountability factor without being the micromanager. We go into that developmental phase, where I'm teaching. Then I stand shoulder to shoulder with them as they're coaching their employees. I want them to get into that leader's coach mentality. It's really taking what's working

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in the Googles of the world, and making it appropriate and manageable for a dentist in his practice, whether he's got five employees or 15 employees.

David Phelps: Yeah, that's good. Do you do this on site, virtually, some of both? How does that work?

Lisa Mergens: The communication training, I can not do like this because I'm a very, obviously, interactive person. You'll see when we speak together, I hate PowerPoints because I wanna be out there talking. One PowerPoints, I'll put them up there, I hardly ever look at them. Usually, there's pictures of dogs on there. So, I need to do the communication training in person because it's very interactive, it's very workshop-like.

Once I do that, then I'm sitting down while I'm there. I'm there for a day or two, and just working with the doc and then I go home. We have these kinds of conversations. We do weekly coaching meetings together. I've got tons of material that they get homework assignments from me and exercises they have to go through. We talk about that and work on where I see challenges, some other areas that they need to develop.

Then once we get into the coaching mode, I will go back on site with them as they start learning how to do one-on-ones. I'll model some one-on-ones with them and their employees, and then let them take over. Then I might sit on a Zoom conference in the background as they're doing one-on-ones on their own for a while, and then we'll do a recap of it or I might have them just record it, if I can't be there, and then we'll screen-share the recording, and then I'll critique what they're doing and move from there.

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Going back into the office also allows me then the opportunity to assess cultural gaps. I just had this conversation with a gal the other day. She reached out to me. She wanted to be on my podcast. She's like, "I love team culture, I love team culture. It's what I wanna do. It's what I wanna teach." I said, "That's great." I said, "But you understand that team culture and workplace culture are two different things." Creating events for people or going out and connecting as a team, that's different than workplace culture. I have the ability to assess workplace culture while I'm there, and then identify those gaps and help them shift to make changes.

So, the idea is really three pillars. It's having the leadership, the communication, and the culture because if we can get all three of those aligned, then all the systems and processes make sense. All of that spills over into their personal lives. If they're communicating, if they've got great communication tools to be using it at work, they're gonna see how it's working there, and they're gonna take it home with them.

David Phelps: You mean, you actually let them do that? I have to sign a non-circumvent. No, you can only use this here.

Lisa Mergens: No, no. No, I want them to because you-

David Phelps: I'm kidding. I'm kidding, of course. I need to say this.

Lisa Mergens: No, no. Of course, but the cool thing about it, and I get a lot of these uhh-uh moments after I've done them, I'll have a hygienist keep coming back to me, I don't know how many times, and say, "My husband and I have been just for months, da, da, da." She's like, "After we did the communication workshop," she said, "I really looked at how we were talking to each other differently," she said,

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"And I couldn't really teach him, but I knew my part of it." She said, "So I approach him differently." She's like, "We are so much happier now." So, when she's happy at home-

David Phelps: Yeah. Can we pause? Let me get my wife in here. No, I'm just kidding. No, I'm just kidding. Yeah, that's so good because you're right. We can only change ourselves. It's not our job to try to change it. I'm not trying to get in your field here. There's things we can do to influence behavior of others right, but it's our job to be cognizant of how we are interacting with people and how we change that. If we start with ourselves first, then at least, we open the door perhaps to somebody who maybe has been a little more dissonant, right, if we're having a hard time with spouse or a co-worker, whatever.

Lisa Mergens: Yes. Then you think about it ... I get into the whole neuroscience of it when I talk with people. So I get into the whole brain chemistry of how our conversations and things are happening and what it's doing to us, physically. But when you think about it, she's at home now, and she's happier. When she gets up in the morning, she's happier because she and her husband didn't have a blowout again last night over who didn't scrape the spaghetti off the plate. She's walking into her workplace in the morning, and she's got a little bit of a lighter step, and she's got a better attitude when she approaches her co-workers. It all matters.

David Phelps: Yes, it does. Yes, it does. No, I love that. I love that. With age sometimes comes maturity and a little bit more wisdom. I've definitely picked up some of these clues over the years. So I totally, totally get what you're saying.

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Again had I known ... I guess we call it being unconsciously incompetent.

Lisa Mergens: That's it. I talk about that all the time.

David Phelps: So that's-

Lisa Mergens: We wanna got for it unconsciously to-

David Phelps: Consciously or unconsciously incompetent, at least, you can start doing something about it, right?

Lisa Mergens: Thank you. Exactly, yeah.

David Phelps: But we will start a life being unconsciously incompetent about so much in life. It is, right?

Lisa Mergens: Yeah.

David Phelps: Once someone can make us aware of, "Hey, here's some tools or some things you can do." It's like, "Oh wow!" We see some things work now, you can start working on it right. I don't know, in life I'll ever become consciously or unconsciously competent.

Lisa Mergens: Yeah, everybody goes unconsciously competent.

David Phelps: Yeah, that's where we wanna be. I guess, when you do something that just becomes so repetitive that you don't have to think about it. There's some things everybody gets that, but that's always the goal. This is really fun.

Lisa Mergens: It is.

David Phelps: So, I got one more thing I wanna ask you, and that is, again going back to you determining if you want to work with this doctor and team, everything has got ... Your ability to reach the team and make change, that doctor's

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got to be onboard. So can you do that? You don't have to have that conversation here. Could you do that with me if I had a team? I was like, "Could you do that in one 15, 30-minute call with me and figure out whether or not I was coachable? Or was I gonna be like the roadblock, I was gonna be the guy who's gonna whine and complain and say, 'This won't work as I sabotage the whole effort,'" Can you tell that pretty quickly?

Lisa Mergens: Absolutely, absolutely because I can ... sure, because you can hear it immediately. First of all, you can see it in how they're holding themselves, right? So that's why I like to do conferences like this. Even if I'm doing it on the phone, you're just, "We tried that, it didn't work. We tried this, it didn't work. We tried this." What I usually find myself saying to them is, "Do you guys stop and listen to one another when you're speaking? Or do you find that people are talking over each other or negating other people's suggestions?" When you bring something to your team that's new, how excited are they to start trying it? A new tool, a new technique, whatever. What's your buy-in?

If I can get them to tell me what their buy-in with their team is like on something like that, then I can find out if they're able to help their team buy in. If they tell me that they're always running in the roadblocks, "Yeah, I bought this new thing, and it's sitting. I tell her, and she never wants to do it." When I hear those kinds of responses, it tells me that they're not leading their team.

At that point, I will say to them, "Doctor, it sounds to me like you're allowing the hands to rule the roost here. Have you considered trying different ways to engage your employee so that they're accountable to not only

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themselves and you, but to each other because where they're dropping the ball?" If you added up the minute, and I talk about that all the time, you added up the minutes that you spend bitching about an employee to yourself, your wife, your friends, on Facebook, you add all those minutes up, that can be up to 100 hours a year for a really bad employee that you're allowing to stay in your practice.

Now, if you spent 10 hours a year working one on one with that employee and got that employee working well, not only are you not giving up all that negative energy, but now you've got somebody who's working harder and smarter for you. Would that help you?

My biggest challenge, David, is the spears and the pain keys and the implant courses and the sleep apnea courses because those things translate mentally for them into immediate dollars. They can't see the capital gains on investing in the human element of their practice.

David Phelps: I totally get that. Yeah. I really want to hear immediate, direct return on investment. At least, they want to think of this there, and you're so right. There are so many intangibles that build in what you're talking about that the return, the gain is huge. It's immense. Also, it's lifetime. As you said, these skillsets that you're teaching, they can evolve and be enhanced and improved, but it's not like you got to go buy the new software to plug into the iTerra or whatever every two years. You are constantly working on this because we all do. We never get to the peak of like, "Well, I got all this." The improvement is self-improvement. It's something you take, as you said, not only in the workplace, but at home, everywhere you go.

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When you have that going on, let's just talk about life has changed across the board.

Lisa Mergens: Yeah. It really has. It really does. That's my biggest challenge. Right now, I'm in a position right now, so I've got my clients going. I don't sign of the long-term contracts because I don't go in there with the consultant's mind. Not that there's anything wrong with consultancy, but my thing is more about the education and the training and the coaching. I don't ever want ... I want them to get a lot of value. So I've got that one program. That's a three-month program. I call it the Launch. It's launching your leadership and launching your team.

It covers all three of those. I think that I've done a poor ... I needed to create a program because everything else before had been very ala carte. I think this was the best way that I can move people into longer-term coaching in terms of leadership and whatnot. That's definitely something I've got it out there. I've got to get it out there a little broader to reach people.

David Phelps: I'm totally with you. I have the same challenges that you do is just how do you reach people, how do you onboard and how do you give them some relatively quick, easy wins because they might need some of those before they wanna take the bigger steps. But those are fun challenges. What a fun talking when we see each other next month because it's almost next month. We're almost there.

Lisa Mergens: Yeah, it is.

David Phelps: In a month. We'll have fun doing that.

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