

**Ep #219: Lisa Mergens - Practice + Systems +
Processes**



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Dr. David Phelps

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David Phelps: Good day, everyone. This is Dr. David Phelps of the Freedom Founders Mastermind Community and the Dentist Freedom Blueprint podcast, back with what's become one of my favorite interviews. We did one a while back with now a good friend of mine, Lisa Mergens. Lisa, how are you doing today?

Lisa Mergens: I'm great, how are you?

David Phelps: Perfect, perfect. Lisa is the owner at Ascendant Dental Development, and I got to know her a lot better just through a podcast. If you weren't with us on that one, go back and check it out, where really it's more of a spontaneous. I didn't even tell Lisa that I was going to use it as a podcast. I actually had asked permission afterwards, which I would always do, to make sure it's okay. But we were just getting to know each other, I thought, "This is actually such good stuff, why don't we just make it part of the podcast and we can do something different today?" It's what we'll do. What we will do today is we'll go a little deeper, but yeah, if you want to know more about Lisa and really what inspires her, what took her through her journey to when she got into dentistry as a dental assistant chairside back when she was 16, and then her path, which for all of us, it's never a straight shot.

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It comes with ups and downs and challenges, and how she then furthered her engagement in dentistry as a hygienist and then went on and got a marketing degree and a PhD in leadership and then today, to what she's doing with Ascendant.

To me, Lisa, and this is something that you'll never really hit me early on in my career, because like a lot of highly educated people, we get focused on the thing, the thing we do. We put the loops on as dentists and it's a mouth and training. That's all important, it's super important, but what we don't realize, and I guess what I didn't realize when I was in practice, and maybe we didn't have to several decades ago. I won't tell my age exactly, but there's a-

Lisa Mergens: We'll both keep it hidden.

David Phelps: We'll keep that hidden, yeah. We'll keep that hidden. But there was a lot more margin, if you will, for a good dentist to not really have to great as a leader, not really great in developing culture and really a team. I don't like to use these words, because they really are condescending, but there was times when, again, decades ago, not today, where I know some dentists just talked about hiring assistants just to suck spit. It's just like, "Oh my gosh." We're so beyond those days. Thankfully, everything's evolved, things are changing rapidly in our industry and globally in all industries, and so we have to up our game today.

For dentists who are, by nature, entrepreneurs because you own your own business many times, not always, but you own your own business. It really is a business today, more so than it was decades ago. We were never given

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the skills, we were never taught the skills of business or leadership, communication, developing culture. Those are kind of like foreign languages to a lot of dentists. Let's kind of go back again as to what inspired you. You don't have to give your whole backstory, but just again, and then let's get into what you're doing, then I've got some really, I think, hopefully some good questions to ask you that will help with people understanding what you do and why it's important.

Lisa Mergens: You always ask wonderful questions. You always ask wonderful questions. Thank you. I do want to go back and correct one thing though, I don't have my PhD yet. I am still in-

David Phelps: You're still there, okay.

Lisa Mergens: I'm still there. I've got a long way to go. It's a long process.

David Phelps: I'm future pacing for you, okay.

Lisa Mergens: Thank you, thank you, you've got my target there for me. I got it too. I never thought that I'd be doing something like this past 50, so we'll leave it at that, but here I am. Here I am. You know, David, the thing for me was that having this long history in dentistry, so almost 35 years now, I have worked in just wonderful, the best of the best practices, and I've worked in the ones that just get by, and I've worked in some very toxic environments. What really moved me was the fact that there's a better way, and we're just seeing this trend of employee turnover and people starting to really disengage from each other as people in the office, but more importantly, the way that our world has evolved now, we've got this social media

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aspect where people sit behind their computer screens and can say mean, hurtful things to one another, or they're texting things back and forth to each other and they're hiding.

We've lost that connectivity on a human level. Right? What I think is happening is a lot of that is also moving itself into work life. Because dentistry was already such a very special snowflake, if you will, of a field, we have our own mindsets in dentistry and we have our own way of doing things. We think that nobody or anything is anything like us when in fact that is kind of true. We have these dentists who come out there who are entrepreneurs who have this debt, who have to open up a business or take on loans to buy a practice, and they're struggling and they don't have those tools in their tool belt to manage the people. It was already difficult because we're in this small environment where people are working very closely, we're invading each other's personal space, so that was difficult. Then you add in everything else that's going on in this very connected world, and it's kind of like one or the other. People are either not as nice, they're really not as nice, or they have these very enlightened people who get it. There seems to be very little in between.

I've found that when I looked at the models that are being implemented in our big companies in these major corporations, Microsoft, Price Water House, Google, where they're looking at how workplace culture can support and move people to do better and to show up more present and to care about not only each other but the products that they're putting out. Why can't that work for dentistry? Why do we have to be the special snowflake? I've been in toxic environments. Like I said to

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you, I had one that was so bad it caused a bleeding ulcer. For me, that was the catalyst. That was the tipping point for me. I thought, "It's not just me and it's happening everywhere else." We have a lot of people who speak towards leadership and who speak towards communication and who speak towards team culture, but there's a difference between company or workplace culture than there is team culture. Team culture is the people and how they interact with each other. Workplace culture, David, is the actual company and the leadership and the communication and the people all mixed in together.

It's having that shared purpose, shared values, shared vision, and most importantly, and I think this is where a lot of us might lose sight, it's that accountability, not just to the business but to each other. You know? That's what I'm hoping to change. It's small steps. I think that... and what I do is I take these great models that are out there in these large corporations and I'm able to kind of retrofit it back into a dental office. So, whether you've got five employees or you have 25 employees, it works. It's just a matter of learning. We make it easy for the dentists and the teams out there, so they don't have to have the plethora of books and trying to figure out which one works.

David Phelps: Yeah. There has to be a construct, because I understand what you're saying, you take the models that work in the big companies and retrofit them back to dental practices with lesser employees. Here's what I'm kind of thinking from a dentist standpoint, and this is true in my own practice. I had a good practice, but what I know today is it could have been better. I mean better in terms of the

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overall workplace culture, what you're talking about. I know what that means today. Back then I didn't. I didn't really know. Words like culture, vision, mission, purpose, those were words that just were kind of flogged around. This isn't my world 20 years ago, right?

Lisa Mergens: Sure.

David Phelps: What I'm saying is I'm probably saying to a number of dentists, yeah, I kind of get that. "David, I get what you're talking about." I've heard these words too. People talk about leadership and these things, and "Right now I've got a practice and our margins are decreasing and I feel like I'm on this treadmill, and I'm barely breathing as it is right now. I've got to pay bills and you're telling me I need to up the game with my leadership and learn some more, and I'm trying to learn everything I can." That's a real dilemma. But the key thing for you, Lisa, is you got to have a dentist, a leader of a team, an owner who is willing to learn and put away all the previous limiting beliefs about what is, what can happen. As long as you're willing, so if I'm willing but I'm treading water, how do you help me? Because I have no HR. I am HR right now. I'm just doing it all. Right? I got to fill a spot where Susie was working and she left on maternity leave or whatever, and I've just got to fill that spot. It's just like I'm tense, so I know you work with people like that. How do you start breaking that barrier down and giving that owner dentist some peace of mind that it's going to be okay, follow the plan.

Lisa Mergens: Here's the first point that I want to make to what you said. I think this is really a key takeaway. That is this. When you're feeling like you're barely treading water, when

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you're feeling like you're overwhelmed, when you're feeling like things aren't going right, and you are at your wits end and maybe you're dealing with employees who are making mistakes all the time or somebody who's constantly calling in, but you feel like you have no choice but to keep them employed because what else are you going to do?

David Phelps: Right.

Lisa Mergens: That's when you need to step back and say, "Okay, there's got to be a way to get a hold of this. There has to be a better way." That comes with engaging the team. I was just doing some reading just over the weekend, and I've talked recently a lot about employee disengagement, David, and the fact of the matter is you can't take a disengaged employee and reengage them. You just have to be willing to. Like we mentioned before, the cost of replacing an employee, it's just extraordinary. It's tens of thousands of dollars, often. But my point is this. If you just say, "Okay, there's got to be a better way," let's think about this. We're not asking you to be the leader of a tech firm here or a big sales group here, all you have to worry about is leading yourself and then giving your employees the tools they need to be solid employees so that they feel like they've got a reason for being there and that they're respected and they're valued and they are, like I mentioned a moment ago, accountable.

If we can say, "Dr Phelps, I understand that you are in a place where you're fighting the overhead right now, you're dealing with low employee performance, but you don't feel like you have any choice." Let's not worry about what's wrong. Let's find out what's right. You know? Let's look at

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this from a positive. Okay, so we've got issues, okay, and we're not going to pretend like they don't exist, but let's find out where the strengths are in your practice, and let's capitalize on them. While we're doing that, let's start showing the employees that we value them. Let's be honest. Let's be transparent with them. Let's let them know that you're going to be working on something new because you want to make the overall practice and their job satisfaction superior. It's going to take some time and you're going to make some mistakes, but you're all going to be better for it.

That's where we start. We start teaching leadership models and we get the doctor into that leader as coach mentality where they're coaching their employees on an as needed, sometimes in the moment basis. They're engaging with their employees every so often, just having one on ones with them, seeing what they need, maybe seeing areas that could use some improvement, but helping that employee understand why improving that area of deficiency will impact everybody. You know? That's the accountability part of it.

David Phelps: So, Lisa, how often do you start working with a doctor or on the team, and as you said, you don't go ahead and focus on what's wrong, you focus on the future and taking the strengths and assets that one has. But oftentimes, depending on the size of the team, there may be some staff, some people that are not going to be good long term. How quickly are you able to help the doctor decide? As you said, that's a tough thing to do where there's a cost of turnover. We know that's huge. But there's also the cost of keeping a disengaged employee as well. Right? It's a tough decision to make. How quickly can that

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be assessed? You obviously are part of that process, because that's a hard thing for a doctor to do. We're so ingrained in the people we've got, whether they're working well or not. It's just like, "Oh my gosh."

Lisa Mergens: Well, you know, a really neat thing happens, David. Say we've got a group of 20 employees. We'll just go for a big number here. Say we've got a group of 20 employees. That's a lot of employees for a dental office. There might be two who are really just fighting it. You know? I mean, they're giving it a hard time. Well, you've got these other 18 employees who are thrilled to see these changes coming about. They're thrilled that they're feeling like what they do matters, they're thrilled that their coworkers finally understand the importance of what they're doing and respect what they're doing. Then you've got these two outliers. You know what happens, David? They become very uncomfortable, because everybody else is getting in their spot on the bus, that proverbial bus, they've got their spot on the bus. But those two, they can't find their seat and they start feeling uncomfortable. They start really showing their true colors, and that's where I call they're like a little terrorist cell in there. They're looking to recruit other people, and the poor conversations and looking to see what they can do to incite people to get angry or to start gossiping about melodrama that comes up.

Right then and there you've got them. The doctor has to make a decision. "Do I just not invite them to come back to work tomorrow, whatever that day is? Or do I take time to find somebody?" But here's another cool thing that happens. When you've got an engaged team and people are all really working together, they just kind of fill in that gap. When you've got to let them go, they know it. They

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don't want that melodrama there. They don't want that toxicity there. So, if the doctor has to let those two employees go, you don't talk about it with the staff beforehand, because it's not a conversation that should be had beforehand, but the morning after it happens, there's a meeting. "Team, we made some changes. It's going to be a little rough, and I know that you guys are all with me because we've been working on this together and we're going to keep working more, but we had to lose two team members yesterday and we need to pull together until we figure out." Sometimes they can reduce their overhead by figuring out that they didn't actually need both of those employees.

David Phelps: Exactly, yes.

Lisa Mergens: You know?

David Phelps: Yes.

Lisa Mergens: You know what? They've reduced overhead, even if they have to hire one person back, they reduced overhead. Everybody else is happier. There's a skip to your step. Sometimes, here's a really cool thing I've seen. Cool, I don't know cool, but an odd thing. One of the employees that was let go was very good friends with another employee that wasn't, outside of work type friends. The employee who remained back said, "I found out about it last night, she called me. She was moaning, she was groaning, she was complaining about it and bad mouthing everybody and bad mouthing the doctor." She said, "I just kind of kept my mouth shut and said, "I'm really sorry that you're in a bad spot right now, but I'm sure the right place will come for you." You know? This assistant said to me,

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"But in my mind I kept thinking, "Thank God I don't have to deal with her at work anymore."

David Phelps: Yes.

Lisa Mergens: You know? "I love her outside of work, but at work I could not," because she was constantly trying to pull her into that nastiness.

David Phelps: Yeah. That just shows strong leadership. You're absolutely right. The times that I've gone through that, even though as the owner I stressed over it. Right? But the reaction to your core team who understand the vision, is on board, is like you don't necessarily say it out loud, but they internally say, "Thank you, thank you, thank you, thank you doctor for showing leadership. Thank you for looking out for us. You did the right thing." You know, it's about freeing up people's future. If they're not in the right place, whatever it is, then they're stalled out in life, and they need to go on and find their right place, those people who are not a good fit. I think we have to turn it around and think, in the short run, it's always painful to make a change for everybody. But in the long run, and you know that because it's what you do, is the people that go onto something else because they're not a fit for your team, it's better for them too, better for their families.

Lisa Mergens: David, and let me tell you something, one of the things that I do try and teach the people that I work with is that when you terminate somebody, unless there's gross misconduct, embezzlement, things like that, you do it with care. You're not going to have this long protracted conversation and say, "I understand how you feel," or things like that, but you do it with care. You might have

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been in a situation, because we are dealing with people's livelihoods here.

David Phelps: Yes.

Lisa Mergens: You know? They're not good for your practice, but they still have to live. They still have to pay their bills, they still have childcare to take care of. So, if we come at it with empathy and care, in the moment it's not feeling good, but if you do it this way, once they're gone... and just say, "This isn't the perfect home for you and there's a better home for you, and I know this doesn't feel good right now, I know that you're probably angry and maybe caught off guard. We've tried working, it's just not happening, but we want you to find where you belong and you can give and do the best version of you there." Then you let them go. But they'll know that. In their heart of hearts, it might be a week or a month or a year down the road, they'll appreciate you for handling it kindly. You know? I think we do have to keep the humanity side of it in mind. We get very caught up with when we're frustrated with people, David, in just being done. "I'm done, I'm so over that person. I don't want to deal with that person. Just get them out of here. I'm finally doing it. You're fired. Pack your bags. Leave." You know? We have to be kind about it because they do have lives outside of the office.

But we do too. Here's the thing. We go back to the beginning about when we talk about how do we help this doctor who's feeling like they're just treading water? If we can remind them that it feels really cruddy to feel like you're just treading water. It can feel really good to know that you can walk into work in the morning with a smile on your face and know that the people that you're going to be

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spending all those hours with are going to be supporting you and helping you and treating your patients well and not making mistakes that will have you frustrated. If they do make a mistake, they're going to take ownership for it and want to fix it right away and you've given them that safe place to come to you if they do make a mistake and not try and hide it or cry about it or put it off on somebody else, because you're not going to react in a way that's angry or you're going to say, "Okay, what can we do to fix this?" You know? "Is there a better way? Did I forget to give you a tool you needed to get it done right? Or was this all on you? If it is all on you, thanks for sharing the fact that you're taking responsibility."

David Phelps: Yes, absolutely.

Lisa Mergens: And then move on.

David Phelps: Yeah. I thought you were going to say we were going to go from treading on water to walking on water, but we don't quite go that far.

Lisa Mergens: No, you know, let's see.

David Phelps: We might have to test it. We might have to test it at some point.

Lisa Mergens: But I wanted to mention this. These practices, not all the practices that I work with, David, are feeling like they're getting swallowed up. You know? Sometimes it's just doctors who really have new initiatives they're putting into the office, new technology, or maybe they do have a great team already and they just want to make it better. You know? They've got this wonderful growth mindset knowing that if they just open themselves up and allow

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themselves to learn new things and new techniques and new ways to engage and to communicate, the greatness they have can be even more. You know?

David Phelps: Yeah. One thing we talked about when we did our prior interview is we talked about the fact that in business, and I might be oversimplifying this, but I'm going to do my best, is businesses that want to grow and deliver higher value experience and things that we know set us apart, differentiate us from commoditization, right? Against commoditization, is some key things in business, any business, not just dentistry, is you need processes, you need systems, and people always talk about, "Yeah, processing systems." Yeah, definitely important. But the other piece that you bring is you got to have the people, you got to have the culture, because they both have to work in tandem, and you really bring that culture. I want people to understand that there's a holistic approach to having a vibrant business. Some people think, "Well, let's focus on the processes and systems." But if you just do that without dealing with the people and the culture and vision, you're going to have a disharmony. Correct?

Lisa Mergens: Without a doubt, without a doubt, because I think I put this out that you put a little query out there-

David Phelps: I did, yeah.

Lisa Mergens: ... that you tagged me on. Basically an organization is nothing more than an idea. A business is nothing more than an idea. You need the people to make the business work. You know? You need people coming in and sharing their knowledge together and their functionality together and relying upon one another to make this business or this organization work. So, as we measure KPIs and ROIs

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and all these other acronyms, we're not measuring the people, and that's really what I do. You know? I'm looking at where their engagement is, I'm assessing their engagement, I am assessing your leadership and teaching you leadership and teaching the teams how better to interact with one another. Again, back to that accountability.

When I was talking before about team culture versus workplace culture, this isn't go paint and have a glass of wine class after work on Thursday, that's important for some people too, but workplace culture is how, like I said, we move through the day together, and those shared values and those norms. We can theoretically just say that you can put all those systems and processes in place, David, but unless your people really want to be there doing them, they're just checking boxes off the list and they don't care if they make mistakes. If it bothers her, "So, she'll be mad at me for a few minutes. She'll get over it." Well, she didn't get over it. You know?

So, I think that if we take the time and back to why leadership matters in dentistry for the practice on the corner down the street from you, it's because you want to measure all those KPIs and know what your return on investment is. If you want to see those numbers go up, then you better start taking care of your people too.

David Phelps: All right, one more question, and I could probably open a can of worms with this one. I'm debating whether or not to do this here, but I think I should. The difference in generations. I'm a baby boomer and we have gen X, Y, Z and millennials. There's definitely differences in all generations. It is what it is. Right? There's typically a lot of

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talk about... and again, I hate to generalize because in every industry or generation there's the good, bad and the ugly. Right? But it seems like millennials get a lot of flack today for being kind of more disengaged and not really fully vested in what they're doing in their careers, or they don't want to work as hard. The social media stuff you talked about, they're kind of all over this stuff. That's kind of an issue for any industry, because that's the generation that's coming on board and getting hired more and more. So, in your best ability to pick that wide open, what would you say about that?

Lisa Mergens: Okay, I'm going to behave myself and I'm going to keep this as concise as possible.

David Phelps: All right.

Lisa Mergens: Millennials are not the devil. The fact that... okay, so we are intergenerational now, so we've got baby boomers, generation X, generation Y, and now generation Z, which my son, my eldest son... well, all my kids are generation Z's. They're all working together. So, we've got intergenerational working, which is really cool. That's a whole other conversation, but as far as the millennial generation, first of all, most of the dentists practicing right now are millennials.

David Phelps: Most are?

Lisa Mergens: Yes, most answer. There's actually two different sectors of millennials out there right now. There's the sector that is already home owners and have children and they're closer to paying off their debt now, and then there's the younger ones who are still straddled with it. But this worker, this millennial worker right now, they're not

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disengaged. They're engaged in a different way. This worker wants feedback in the moment. They don't want that year in review. They want to know what they're doing in the moment because they want to be better in the moment. They are much more mobile, and they're less likely to stay in a job if they feel like what they're doing doesn't matter or if they're not getting that feedback to know that they can be doing better.

When we talk about job turnover with millennials, it's only because they're searching for that environment where they're going to feel valued and where they're getting those other needs met. Those needs are very simple. They are competitive. There was a... and I'm sorry, I don't have it handy with me, but there was a study done, it was a blind study, and the millennials actually were as much or more competitive in the workplace than your gen Xers, but they just don't show it because they're a little more low key, laid back on the surface. But they're very competitive. They really strive. Why do you think we have all these great tech companies coming out now that are being... they just want to keep doing, doing, doing and be better. But we have to... these employees, they want feedback in the moment. They want to know that they're connected to that shared purpose and that as a leader, that's your job. You want these employees happy. You've really got to tie them into what they're doing.

They're really getting a bad wrap. They truly are. I would say that each generation has got amazing qualities, and so when we start looking and what we can all bring together and when we sit down as a group, you've got a dental office that maybe your receptionist has been there for 25 years and she's a baby boomer and you've got a

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younger dental assistant and a hygienist in the middle somewhere, you know, when you sit down and you're having your staff meetings, hearing everybody's input is really neat. They get that shared purpose from each other as well.

David Phelps: More important than ever then to develop a leadership mantra for the owner and the culture and the vision more important than ever. Is someone's having trouble with turnover, that's probably the first place to look.

Lisa Mergens: Oh, absolutely.

David Phelps: Don't blame, "Well, these people don't want to work." It's like, well, wait a minute. Let's be fair. Let's look inwardly and say, "Well, what do I, as the owner, need to do to step up my game and get some help there?" Because yeah, it's something that a lot of people haven't done and haven't looked that way.

Lisa Mergens: Leading back to when we're talking about leadership, one of the most important things you must do as a leader, one of the most important things you must do is you must remove roadblocks for your employees. If there's something preventing them from doing what they need to be doing, then you have to remove that. Now, you can't remove yourself, but you can do the work on yourself. You can learn new ways. If you're the roadblock, if you're what's happening, if you're micromanaging every step of the way, if you're hovering over people and you're short with people and you're not coming from an authentic place and being transparent about what's going, I think that's one of the biggest problems because often times when you're living in this very autocratic leadership style, you're very alone. You know? You're sitting there in your

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office and you've closed the door and everybody's out in the rest of the area. Like I said, you've got these bills and you've got these responsibilities and it's not just to the practice and the patients, it's knowing that you're responsible for paying these people so that they can continue living their lives. You've got your family life at home.

Leadership can be a very lonely, lonely place. We kind of go down that dark hole. One of the easiest things you can do is to be transparent. I mean, not lay it all out on the line for your team, but let them know what's going on in the moment and what challenges that you're having, because oftentimes they might have an answer for you or can help you solve the issue or put their minds together and take a little bit of the weight off of your shoulder. That's what they're there for too, but they don't know unless you give voice to it and tell them. Don't live in that dark hole of leadership. Be out there with your people. You're going to have that executive presence and that executive voice as a leader, but you do it in a way that they can relate to and that they can be supportive of you just as much as you are of them.

David Phelps: Lisa, really, really good. Lisa Mergens, Ascendant Dental Development. Lisa, best place for people to engage with you, website or other?

Lisa Mergens: Sure. Well, they can always go to ascendantdentaldevelopment.com and they can email me, lisa@lisamorgans.com. Then on the website you can find my phone number and I'm on social media. You know that, David.

David Phelps: I know, yes.

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Lisa Mergens: I'm on social media and we're going to be speaking together at the Dental Win Win Summit at the end of the month.

David Phelps: That's right.

Lisa Mergens: I'm really looking forward to that. Yeah, you can find me on social media as Lisa Mergens or Ascendant Dental Development.

David Phelps: Perfect. Well, really always enjoy the time with you, learn a lot from you. It's always an evolving process. I'm on that track myself. Just we bring a lot to anybody who's got a small business and wants to empower the staff and then really have a fun place to work, because we spend so much time in work, why not make it a great place to be? Lisa, thank you so much.

Lisa Mergens: Thank you, David.

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