

**Ep #265: Robert Nickell - The Advantages of
Leveraging an Outsourced Team**



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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. Here today with a special friend and special guest of mine who really adds a lot of empowerment and leverage, really to multiple business sectors. This is something that I love to talk about to my audience. So let's just dig right into it. Mr. Robert Nickell. Robert, how are you doing sir?

Robert Nickell: Great, Dr. Phelps, thank you so much for having me on. I've obviously been an avid listener for a long time and following your newsletter and been friends with you for a few years now. So excited to be here and really appreciate you having me on.

David Phelps: Well, it's great to have you here. You and I met through Mutual Mastermind Group, Collective Genius some years ago. And then I found quickly that you come from somewhat the dental world because your father, being a dentist and we actually ... you grew up ... we live in the same general area in the Dallas metroplex, so a lot in common. And you are the founder, CEO, chief guru guy of the company called Rocket Station. I could call you rocket man. But I think Elton John stole

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that already. But you got the shoes, I like the shoes you wear, definitely show that you are a guy that's on the go. Speedy. I don't know if you have those shoes on today or not. I won't ask you to put them up.

David Phelps: But anyway, I love your passion and what you do. So let's dig into it. Because I know our audience is going, what's Rocket Station? What are we talking about here today? So give me some background, give me a little bit of a context here, Rob.

Robert Nickell: Yeah. And so what Rocket Station is, it is a tool for small to mid size operators and businesses to be able to leverage some of the tools that are available today for efficiency and productivity. So we are technically a business process outsourcing company in the industry. And all that means is we work with our client partners to do two things. One is process and systems building. So that's everything from scripting all your calls and day to day task management workflows so that you can really have a strong foundation for task management, accountability, and employment productivity. That's the first step. And we think that creates the roadmap for what everybody calls, right person, right seat. So before hiring people, we think if you have a strong foundation as far as systems and processes in place. That's very good, difficult for most businesses is to really document their processes. It's a very tedious, difficult process, but we feel like once that's done, then hiring people becomes a whole lot simpler.

Robert Nickell: So the second step of that is we placed dedicated staff with our client partners based on skill set and job description. So accounting and bookkeeping or admin or inside sales or product support or whatever it may be. So dedicated staffing based on systems and processes is what Rocket Station specializes in.

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David Phelps: And is the dedicated staffing, just for clarity, now, is this onsite or is this remote staffing, Rob?

Robert Nickell: Yeah, it's remote. It's virtual. So we're a Dallas based company. That's where we're headquartered. We're in the Campbell Centre right off 75. So anybody see the show Dallas, those intro videos of the gold building, that's where we are.

David Phelps: Yes. That's you. That's you. You are the new JR.

Robert Nickell: First time I've heard that. But I've heard worse, right? Yeah, we're a Dallas company, but our teams that execute the projects are primarily based in the Philippines. So we have a Philippines headquarters as well that services our US based company and our US based client partners.

David Phelps: So this is a really big topic Rob, because the big conundrum today across the board in small business America, well probably business period. But you and I, we deal with smaller businesses. Me, with a professional practice owners, you with a wide variety. If small business is ... today with the unemployment rate being very, very low right now it seems to be very difficult for small business owners to attract and retain a lot of good quality staff, employees, good help. It seems like there's a lot of churn rate and I think you already said it well. I think we get this backward or we try to bring in people into our company when there's probably not a good workflow. There's not a good culture, there's not systems and processes, so even good people coming in may find that they come into chaos and then chaos leads to churn and turnover.

David Phelps: The second part is, I think again, typically in small business, brick and mortars, we think that we have to have everybody who helps us be there on site. We need to have people in seats there. Well, yes you do to some extent because

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we're in the dental industry and chiropractic and veterinary medicine, we have patients and clients coming in to serve them, so you have to have people onsite there. But there's a lot of workflow, a lot of systemization processes that can be built and handled outside of the brick and mortar. Correct?

Robert Nickell: Oh absolutely. There are definitely roles that you're talking about that need ... but I think in a dental practice, one of the most ... I grew up in a dental practice and when we moved from Brownwood, Texas to Van Alstyne, Texas. I actually slept for six or nine months or however was in my dad's dental practice while we were transitioning. So I've actually lived in a dental practice.

David Phelps: Yeah. That's why you have such great teeth. You had the fluoride in the air all the time. That's what it is. Now I know. Now I know.

Robert Nickell: Right. So the dental practice is something that I feel like that I understand pretty well. And to me that one of the most important roles in that practice is the person sitting up front because they control so much of the culture of your office, the in and out and the relationship management piece. It goes so much further than just the doctor sitting in the chair. So there are absolutely positions that need to be filled within the office.

Robert Nickell: But you can think about so many of the day to day things that are happening that are absolutely not necessary internally. So one of the practices that we work with, and in Forney, but literally right between where you and I live in the middle, is they're doing different marketing projects. They have different campaigns based on different seasons. They have, whether it's teeth whitening campaigns. They have all kinds of different marketing campaigns and lead generation and Facebook ads

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and just community projects and newspapers and it generates a lot of activity for the practice.

Robert Nickell: Somebody has to answer the phone and treat every single call with care and with a smiling face. But does that person have to sit in the practice? No. So it freed up the doctor there in Forney to be able to spend a whole lot more money on marketing, generate a lot more opportunity. We can not only help qualify those people, which is appointment setting and getting people booked appropriately. But also provide a friendly face for the people that are just interested in ... we call them phone bugs. People who just call and ask questions, but don't ever actually walk into the doors. It's still nice to have a friendly face representing your practice with every single person that's interested in whatever you're doing. So that's just one example.

Robert Nickell: But back office admin and bookkeeping. So much of the day to day is done on a computer, which is really what's changed in professional practice today in my opinion, is instead of having files that we put behind the desk. Which I have filed, I'd spent more hours than most people could ever dream of filing, be able to grow, be able to do more efficient. You and I talk all the time, Dr. Phelps, business is easy. You know how to run a practice, right? You get that. But execution, managing people, office culture, that's what's so difficult, right?

David Phelps: Yes.

Robert Nickell: So if you can strategically look at your business and say, hey, is how we'd like to run and manage to practice in a ... we're going to drop marketing and campaigns consistently, we're going to keep the phone ringing and we're going to have the trunk lines blowing up. We're going to have these ... you can operationally, from a strategy standpoint, build the business that you really want to build because you can bolt on and

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outsource and leverage companies. Not just us, but companies like us that can handle so much of the day to day. Then as the core practitioner, you can focus on your core competencies and really build the practice from both a strategy and a focus standpoint. And the day to day growth and task management doesn't have to be so burdened.

David Phelps: Yeah, well said, Rob. It's a different mindset, no question about it. And it's hard for people who have been out in the business world, out in the practice mode for five, 10 or more years to really grasp how the world has changed. Yeah, I get it. Change is hard and when you've been doing things a certain way, when your mind's set a certain way about how you run your business or your practice, it's hard to think about how it could be done a different way. Younger people, a little more adept at that today because they're growing up in technology and systems and they're a little bit, find it easier to think of this way about having remote, as you said, bolt on business partners or vendors to help.

David Phelps: I think that the core message here is that when you have a brick and mortar business or a service is that the people that are there in that brick and mortar, their focus should be entirely, or 90% plus on the people that are coming in and being served that day. Focus there. What happens is there's all kinds of extraneous issues that come up, as you said. Bookkeeping and insurance and billing and the scheduling people who need help with the ancillary activities, but they're not in that practice today. So what happens at the front who is very amiable and is generally good at it and putting that customer service, that experience that is so important to have and she gets dragged over into handling a call on insurance and gets stuck on a phone for three to four minutes and now she's trying to

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multitask and you know what happens there when you multitask you don't do anything well.

David Phelps: So we lose that opportunity to serve there. Also in any business today you've got to have the capability to serve patients' needs while they're there. The words we talk about, same day dentistry. Patient comes in, they have a cleaning done. Is everybody focused on being able to serve that patient? Could they move to another chair and do dentistry? Well they can't if Suzy is on the phone to Henry Schein and trying to figure out where the lab kit is. Again, it's a misapplication of resources and what you're really good at doing, what you have figured out and helped so many businesses do, including dentistry is outsource this and do it in a way ... you simplify it, you lead the way. And I think that's the biggest problem is that, if you can't visualize it, then you feel like there's a roadblock there.

David Phelps: What I know you're really good at doing Rob because you're very amiable, you're very conversational, you're very easy to work with is that you help people just take the first steps. Let's just take one thing at a time. What, today, is one of your biggest challenges in your practice? Is it insurance? Is it billing? Is it bookkeeping? Is it some kind of admin?

David Phelps: Another one you mentioned, big, big one, that so many doctors have trouble with is marketing. We could do a deep dive on that. You know a lot about marketing because you're so good at lead generation and how you can outsource that, but still have a person that's dedicated to your office full-time that can help do that. So talk a little bit about, how do you onboard somebody when someone's asked you, Rob, this is great, I'd like to do some of this. Where do I start? How do you help people with that process?

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Robert Nickell: Yeah, patient experience, in my opinion, is everything. You worked so hard to get somebody inside your doors. You're talking about same day dentistry. When they walk out of that office, they're either your biggest asset or your biggest liability, in my opinion. Because they're either going to be a raving fan or they're going to be saying nasty things about you.

Robert Nickell: All it takes for someone to be upset, is after they leave the chair and they go to checkout and they're trying to do the follow up or get their kids scheduled or whatever it is. And while they're trying to pay you, the person on the phone said, "Hold on one sec, let me ..." and then you've got that person checking you out doing three things. What an awful experience. I mean what a terrible experience for me as I'm paying you is this professional. And then the experience you create for me in your office is not a good one. For me, it's this big gap as I go into ... it's not just dentists. Professional practices all face that issue because you mentioned that resources are limited.

Robert Nickell: So if we can think about it a little bit differently, it's like, okay, how could we create the best patient experience? Or how could we generate more leads and activity for what we're doing? Because if you're a great dentist, people need to know about it. And that's the point of marketing is to get your message out there. Not to trick people, not to create something cheesy or stupid. We've all seen practices that have some questionable marketing techniques. That's not the point, right? The point is to strategically be able to say, hey, we can craft our practice, our business, the way we wanted to and then executing is a non issue today because of technology and resources like that.

Robert Nickell: So the first step is for us, we always think alignment and strategy is the best way to start. So we start with the discovery

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call with all of our potential client partners and any doctor, I think, can look at it. It's pretty simple. You think about the people that are in your office. What did you hire them to do? What are they actually doing in the day to day right now? And then if you tried to ask them, if you go to almost any employee and you say, hey, how was your day? It's like, good, good. It was so busy. It was so busy. Okay, tell me what you did today. What did you actually do today? They're going to look at you like a deer in the headlights and be offended. They're like, what are you talking about? I had meetings and people were in and out and we just, the day was great. It's because we were all just scrambling to get through the day.

Robert Nickell: So I think the first place to start is just to kind of think about who you hired, why they're there, what are they actually doing all day, and is there any awareness in the day to day task management of what everybody's actually doing and where their time is being spent and how they're managing their days. Or is it just kind of chaos getting through the day? With a little bit of friction because you've got a couple of stars and a couple average players and it blends together to be okay. If that's where you are, I think the first step is really just look at it strategically and say are we creating the best patient experience or are we running the practice the best way possible? And if not, you need to take a step back and look at your systems and processes.

Robert Nickell: And for me, service for us and other companies that are business process outsourcing companies, I think it's some of the most value that we can actually offer is helping you just slow down, take a thousand foot view of your practice and what you're trying to accomplish. And then see what steps are possible, what's available to actually be able to get you where you're trying to go. So whether that's patient experience,

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whether that's practice growth, whether that's what we like to call practice management. So that's patient experience, follow up, appointment setting, all the back office stuff that it takes to make the practice actually move. The first step is just looking at it, are we doing a good job? Are we capable of putting systems and processes in place? If not, let's reach out to someone like Rocket Station or whoever that can help us systematically have a foundation for our employees to be successful. Then in my opinion, the management, the day to day accountability, the structure becomes a whole lot easier.

David Phelps: Because you've figured out how to scale and you're really good at task management and systems and processes. Does Rocket Station, do you act as like a coach consultant for your client businesses or would you say is that ... is that a proper way to put it?

Robert Nickell: So we like to think of ourselves more of a guide. So the doctors, the physicians, the veterinarians are the experts. We are not the experts in your practice and everybody wants to run your office a little bit differently and we think that's great. That's one of the best parts of being able to run a practice is you get to carry the stick and the buck stops with you, right? And that we think that's a great thing.

Robert Nickell: So the first thing that we like to do is get aligned with our client partners and we just call that a discovery phase. So we spend time understanding the practice, how you work, the town you're located in. My dad, he always had practices in small towns. The way he operated was very different because it's a very intimate experience when you're in a town of 3,500 people. It's very different than our doctors in the middle of Dallas that are in the middle of the 7 million person metro, and that is just huge. That's a different practice experience.

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Robert Nickell: So the first thing that we do is just get aligned with the practice to really make sure we understand. And then identifying opportunities will be a little bit different for everybody. But technology has made it so amazing where most of the practice, when you really think about it, besides what's happening in the chair, is done on a phone or computer. So the things that you don't have to have a high level internal person, which is most of the day to day of a practice is done on a phone or computer. If you get structured with a company like us, if you spend a little bit of time, we can identify within your practice all of the day to day stuff that you could potentially outsource that you could potentially have somebody help you with. Then from there you just make decisions what's best for you and add on.

Robert Nickell: So for example, the Forney partner I talked about, she started in marketing and she now has team members across every department in her business. But that's because her confidence grew with our competence as we implemented and executed those projects. So like with anything else, you start small, you identify one or two things within the practice that's a bottleneck. You solve those problems and then scaling from there becomes very simple. It's almost like turning a knob once you've solved some of the baseline issues, some of the first or second issues that you solve, then growing and scaling like you mentioned, that becomes a whole lot easier. For me, you can't solve all problems at once.

David Phelps: So I think some of the objections that someone might be listening to this would have would be you're working with outsource remote processes from somebody in the Philippines. So let's talk about that. What's your relationship? I know what it is, but I want for the benefit of our audience set to understand what your relationship with building these teams out of Philippines. How do you do that, Rob?

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Robert Nickell: Yeah, so there's a few things that we all want within our business. We want anybody who is outward facing. So answering the phone, representing our business. It doesn't matter whether you're in private practice or you're a B2B service provider, whoever is representing your company, whoever is in the face, we all know how important that is. So from the first phone call and customer service, general trunk lines. I mean the most common objections are, what about English proficiencies and competence and skill sets? Are these people qualified? Are they competent to actually be able to execute the jobs? And the answer to that is absolutely. And we wouldn't be able to fulfill and execute these projects if it wasn't a direct replacement where our client partners' sphere ... so our private practice partners, their patients have no idea that our team members are in the Philippines. They don't have any idea.

Robert Nickell: It's dedicated staff that you are actually picking who joins your team. So you have interviews on Zoom just like this. So nobody would actually join your team that you weren't really excited about. But on our end, they're our employees. So they're not even a 1099 contractor for you. It's just a service agreement. So for us, that is the primary foundation of our infrastructure is talent acquisition training and then onboarding and implementation. So we're screening over 4,000 applications a month. We're hiring less than 2% of those. They come into a training program that we have for six to eight weeks, so they're actually on our platform for about eight weeks before they're available for interviews. And we're matching skill sets and job description. So building out the systems and processes on the front end creates the roadmap for us.

Robert Nickell: So if it's going to be somebody that's inside sales or marketing or client facing or being on the phone, that's a different skill set than then admin or bookkeeping or some of

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the back office support like insurance and payment processing and follow up. So the objections, the questions that people have, more than valid and reasonable because we all want the right representation for our business. It wouldn't work for us if the fulfillment wasn't what our client partners were expecting.

Robert Nickell: So, just one more point on that. Not that long ago it was hard for smaller businesses to outsource because you really didn't have any options. If you're Dell Computers or you're Compaq, or you're NetJets, you could sign a massive contract with one of the few outsourcing companies that exist. And then you get questionable service and questionable quality control, but you're at a scale that it doesn't really matter. So if your Target and you get 12,000 calls a week into your credit trunk line, you just want 90 ish percent of those handled well. So there's thousands and thousands of calls that you're great with being terrible. But if you're a small practice owner, you can't have one call be bad, much less 10%.

Robert Nickell: So what's really changed today is small practices have options for outsourcing providers that can provide the quality and controls that actually equate to the service level that people want and deserve. So instead of getting low level talent with marginal English and uneducated and don't have college degrees and you have no idea what you're getting, today your options are just so much better with the staffing that you can place. Technology's really bridged a lot of those gaps. It's just a more mature industry. So the idea is that anybody who works within your practice, your entire sphere thinks and assumes they're sitting right there in your office here in the States.

David Phelps: Rob, what about creating, building, maintaining the culture within your brick and mortar and incorporating outsourced great virtual assistant people? Using technology of

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course, how do we kind of bridge that and to the extent we want to or feel like we need to, or feel compelled to have that person who is helping us as an outsource remote person be a part of our team? How do you guys help us do that?

Robert Nickell: Yeah. I think that most dentists and private practice professionals, when they're sitting down in the evening, we're having dinner and they're actually being honest. The things that that bother private practice professionals the most is usually the emotional capacity it takes to maintain culture. It takes a lot of energy and a lot of focus and a lot of work to drive culture within the office. And not everybody's as good at it as you are or as focused as you are at making that happen. So for a lot of professionals, culture is very difficult. I mean I think it's hard for all of us. It's one of the things I admire the most about you is your consistent and constant focus on culture and having the right people to execute because that is your business, right?

Robert Nickell: So culture, man. That is such a huge part of the practice and what we do. I think it becomes easier when you have remote team members because the people who are sitting in your office, you can have best butts for those seats. So you can hire the best people possible internally, which makes showing up to the office a whole lot more fun because you really enjoy being around the people that are there because the people that are there are actually earning that seat and really deserve to be there so you feel good about them. And then they're supported by outsource teams. Integrating those outsource teams and into your culture. Zoom calls and some team meetings, all you have to do is include them on the team meetings, the reporting, they'll send you start of day, end of day reports. So they'll very much feel and function like they're members. We'll just help you set up that structure.

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Robert Nickell: But it's very simple to integrate team members and I think it becomes a whole lot easier to build culture when everybody's not sitting right there in your office because you have a lot more control on the way you can implement the day to day. And I think that's one of the most fun things about outsourcing is that freedom, that release of emotional energy, of just the overwhelming what it takes to build great culture in the day to day.

David Phelps: Yeah. And I think just as an outside inside here, is that my whole team, Freedom Founders, we're all virtual. Now we do meet in person a different times during the year. So we do have that camaraderie. But 95% of the time we're virtual and we have a pulse and we meet. One more thing I'll add is Robert, you were a very integral, a number of years ago, you helped my team, and particularly my executive assistant, Lindsay, have her own VA. So it's a multiplier effect. And Randy, who you helped us is still an amazing part of our team. So we're all virtual, but my virtual team has other virtual people that help them.

David Phelps: So it's an extrapolation of what you're talking about here. It just comes down to mindset and understanding this is all so possible today. The the opportunities, the options that a brick and mortar can use today to leverage the scale, and I should also say the redundancy. What I mean by that is that is that, again, if you lose a good team member because a life change happens or just whatever, there's a big barrier to replacing that person. Right? If they're good, they're solid, it's hard to do. Well, with the team outsourcing that even help people do. Again, not that we want to have churn and lose good people, but you've got systems and processes already built. You've got the training in the modules already there. For the small business owner that's just what likely beats us in the face every time we lose

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somebody. Because we got to retrain, right? It's like no, you have helped us build these workflows in these processes in these areas that are outsourced and now it's almost plug and play. Is that fair?

Robert Nickell: Yeah. I mean that is really the idea. Not to be crude about it, but as much as I can factory my business, make it knobs and levers that turn to get to the outcomes, that's what I'm trying to do. All of us hire people for outcomes, not because we just want to grow the number of people in the business. Right? So yeah. It's really just about, you talked about a mindset. It's just there's so much of the day to day that it's no longer necessary to have to have somebody sitting in your office. You're a perfect testament to that. But what's really cool about what you guys do is it's a constant thing, right? So you guys have a strong rhythm and I don't know if that's attraction implementation, but it seems like that's what your office follows because you have your meeting schedules and your rhythms that you guys go through. And then you've got strong systems and processes.

Robert Nickell: So plug and play is now possible, but it's because, Dr. Phelps, your team spent some time with us and we're investing back in us. So the resources that we could create were a direct result of your team's willingness to work with us. We went through that process that I call brain damage. My team hates when I say that because it's just the process. But it's not fun. It's painful. It's painful to go through.

Robert Nickell: But that's why our team does it for you so that you don't have to do it. Your internal team members don't have to do it. And then yes, it's plug and play. So if you're willing to invest on the front end, the back end is so much easier and then you have turnover. What used to just be my ultimate nightmare, which is turnover. I would keep B and C level players on the

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team forever and ever and ever because I'd rather have an average person there then go through the process of turnover. Not anymore. When you've got systems and processes in place, you know what it looks like to have an efficient, productive team member. Turnover just sometimes is actually a productive part of the operation instead of this painful nightmare.

David Phelps: So well said. It's a game changer for sure. So so Rocket Station, rocketstation.com and if somebody's interested in doing a discovery call to see what the possibilities would be for them to leverage the outsourcing capabilities in their business or practice, they can do that. And you gave me ... but I'll make sure this is correct, you gave me that. It's Greg Brooks is his name, part of your business development team and the email would be brooks@rocketstation.com. Is that correct?

Robert Nickell: That's correct, yeah. Greg Brooks is director of business development. He runs a team of workforce management experts and I don't care if you're going to hire our canes or not. Anybody who's honest and sincere about these ideas and these concepts we've talked about, happy to answer questions and just go through that discovery phase with anybody who's honestly and sincerely interested in that process. Yeah.

Robert Nickell: Email Greg. The team will set up 30, 45 minutes and in that first call I think you'll be surprised at how much you can get answered, how much insight you can have into the process, and from there the roadmap of what to do next becomes pretty easy and pretty simplified.

David Phelps: Outstanding. Brooks@rocketstation.com. Robert Nickell it's always a pleasure. Thank you for your time today and great insights. So many good leverage points, inflection points that

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people can use here if they will just dive in and open their mind to the possibilities. Thank you, sir.

Robert Nickell: Thanks again for having me. This was fun.

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