

The Integrator Superpower - Systematizing the Execution of Your Vision – Zach Hoskins: Ep #419



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Welcome to the Dentist Freedom Blueprint, a podcast about freedom—freedom from expectations of society and the traditional path to success that has been ingrained in us from our early years, I'm joined by mavericks, renegades, and non-conformers to discuss an anti-traditional path to financial freedom, freedom of time, relationships, health, and ultimately freedom of purpose. My name is Dr. David Phelps. Let's get started.

David Phelps: Good day, everyone. This is Dr. David Phelps of the Freedom Founders Mastermind community and the Dentist Freedom Blueprint Podcast. Today, I'm looking forward to a conversation with a gentleman that I've had really the honor and privilege to get to know much better and really in the last year and a half.

He comes through really a referral from other people that I've become good friends with who I know like I can trust. I think that's sometimes the best people that we get to associate with, whether that's on a personal basis or a business relationship, or sometimes it's both. But I'm pleased to have Mr. Zach Hoskins with us today. Zach, how are you?

Zach Hoskins: I couldn't be better. Thanks for having me. It's an honor to be on the podcast.

David Phelps: Zach, you bring a lot of experience and capabilities to what you do, and we're going to dig into what you do. I know I'm keeping that a little bit on the side for a moment, but we're going to build into what you do, and how you help a lot of the people that I love helping.

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In my community and Freedom Founders, we are mostly health professionals and a great number of those are dentists. And you do help a lot of our clients. But really, what you do is relevant, I would say, for any small business owner, and we can define what that looks like.

But let's kind of go back in time a little bit with kind of where you came from and how your experience in your earlier years have really led to the capabilities that I think you bring to the forefront.

And I know that you have achieved the rank of technical sergeant in the 131st bomb wing with the Missouri Air National Guard, and you were awarded the Air Force Achievement Medal — breathtaking achievement.

So, let's go back there and talk a little bit about your halfway forward to where you've landed today, and what you're doing there. So, let's go back in time. And what experience that you had with the Air Force National Guard have brought you to where you are today?

Zach Hoskins: For sure. That's a great question. So, going back, I always say my background is kind of two-fold, and I'm sure we'll get into the other fold here in a bit. But the one-fold that you mentioned is the military background.

So, my dad is a Marine, and I grew up in a military household, very disciplined just in a way of things needing to be in a specific way. And that played really well to my personality and plays really well to the things that I do day-in and day-out today.

And so, going back to my time in the military, I was able to have the privilege of joining the Air Force in the Air National Guards.

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So, I worked up at Whiteman Air Force Base on the B-2 Stealth Bomber.

And through my time in basic training and tech school, I was able to learn different ways of presenting information, gathering information, and presenting information, specifically flows of information.

And so, that's probably one of the key relevant pieces of what I do today, is gathering information across multiple different avenues, disseminating them down, and then presenting them in a simple, clear, concise, and consistent way.

And so, whenever you look at the military, you kind of have some of those key pieces: discipline, comradery, leadership, a lot of those different facets have helped me get to where I am today.

And so, that kind of drove into me, also, the ability to continue to have core values at the forefront of my mind. And so, I've always had core values at the forefront of my mind for a long time, especially through the military. They were kind of not forced into us, but they were instilled in us.

And so, when you look across those pieces of discipline and leadership and flows of information and keeping things simple, it's been really awesome to utilize those individual pieces in my experience to get to where I am today and to help the clients that I work with on a day-to-day basis today as well.

David Phelps: So, how did you morph from your military experience and actually helping business owner clients with what you do? What was the catalyst for that?

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Zach Hoskins: So, it's interesting. So, the way that my mind works is I tend to self-identify myself as both a visionary and an integrator. And so, during my time in the military, I feel like I was very on the integrator, boots on the ground, disciplined type scenario.

And so, whenever I was in college and after I graduated college, I had always had this drive and desire to be a part of things that were innovative and that I could create with and build and collaborate with others to provide value if we saw a need in the marketplace.

And so, what I did there was I started to network in between my time in the military and even during school. But then, after school, I was able to network with entrepreneurs here locally, in Springfield and across the nation.

And so, what I found with that is whenever I collaborated with those entrepreneurs, I was able to kind of flex that creative muscle and have that innovation and that drive.

And so, there was a two, that's kind of the other part of my background in a nutshell. I have this integrator side, which is the military side. And the visionary side, which is the entrepreneurial startup, kind of how do we get things off the ground? How do we help other businesses? How do we help startups get off the ground, basically?

And so, over the past 10 to 12 years or so, I've been deeply ingrained in both of those sides. And I'm no longer a member of the military at this point, but those experiences and those strengths, and those different experiences and challenges continue with me day-in and day-out.

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However, I am also still involved in the entrepreneurial startup side, just kind of in a different way now. And so, that's to say that the catalyst and the transition, it almost was a two-fold parallel scenario of the visionary side and the integrator side coming together all at the same time and just being able to learn and grow and build things and create.

David Phelps: Most of us don't have that variability or adaptability to be both visionary and integrator. I mean, I know there are some like you that have that uniqueness and that gives you the ability to practice and appreciate both sides as you alluded to.

So, with entrepreneurs and the visionary and the startup, and that's probably a lot of business owners. I mean, that's kind of typically where they sit in that seat.

You know as well as I do, and I can speak from being one of those very visionary and while I appreciate the detail and the necessity for someone to be that in that integrator to find those a little bit better for people — I'm sure we'll get to in a minute.

But I appreciate that is where I think the collision occurs, or the friction, I guess, for those who have these great ... we have these great ideas. We have this energy, and we want to go take on the world and expand and solve these problems. And we're always on fire to do it. And yet the missing pieces are just what you talked about.

We're not very good with gathering data, the flow, presenting it because well, we keep it all in our head most of the time and expect other people just to kind of understand who we are. And like most people don't understand who we are because we're kind of different.

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So, talk about maybe a little bit more about that visionary and then the integrator and maybe describe it more of that integrator role and then we can dig into more of then how you are actually making this work in helping clients that you take on today.

Zach Hoskins: Yeah, for sure. So, if you haven't read *Traction*, I would highly advise you go out and grab that book. I mean, that's going to kind of give you an idea and a background of what all we're talking about here.

And kind of my internal ethos of how I see almost every business being able to operate at a super highly efficient, easy, lucrative and fun way to take Joe Polish's word.

So, a visionary is just like you said, Dr. Phelps, it's that person who has 20 ideas. They always have those ideas coming out of the shower, they're on fire for ideas. They've got that fire in their belly to go create and build, and they're typically better with large relationships. They're typically more on emotion and less on logic. They are better with culture and being a guardian of culture.

And the integrator, on the other hand, is typically more on logic and is able to have those tough conversations. Almost tough conversations can come more natural to that integrator because they have the systems and processes in place to make those conversations more objective rather than subjective.

And if you think about it, the visionary and the integrator leading a business can be like rocket fuel. And there's a book out there called *Rocket Fuel* as well, which I would highly recommend.

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It's how you can maximize the relationship, if you're an integrator, and you have a visionary, or if you are a visionary and you're looking for an integrator — if you have the right combination there, it can create that rocket fuel.

So, what ultimately ends up happening, this is a look behind the scenes, but let's say the visionary comes into the office or to the practice and the visionary's like, "Okay, I got these 20 ideas out of the shower this morning. Here's what we're doing."

Well, they could go to the integrator, they could go to the office manager, the operations person, however you define that integrator in your practice. And they can say, "Hey, here's all the ideas I had."

Well, the integrator's job is to look at all 20 of those ideas and say, "Okay, these 19, I think we need to wait on. I'm going to reign you in. However, this one, I 100% believe that that is the one that we need to operate on today based on our core values, based on why we exist, based on where we're going and how we're going to get there, and our structure chart and all of that."

And so, that's a day-in and day-out basis of how that visionary and integrator relationship can work. You end up landing on that one idea, taking it and running with it.

And then the visionary can sit on those 19 other ideas. If it comes up again, it comes up again. But typically, the integrator's the one that reigns it in, but then also follows through and makes it happen across the different departments, maybe it's marketing operations or finance.

David Phelps: So, for that small business owner ,dentists, dental practice, which is a lot of what we deal with in our community, is

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for that visionary, that entrepreneur business owner to tap, find a recruit. If necessary, that person who's going to be the integrator, director of operations, whatever name you want — office manager.

That's obviously got to be — maybe not the number one thing, but I know you have a process.

So, let's just use real life. Let's say I'm a dentist, I don't practice anymore, but I certainly did for many years. And sometimes I had an office manager, sometimes it was more different names like you said, but EOS traction wasn't ... even a system was out there/other systems.

So, I didn't even really understand that at all. I just ran like the typical entrepreneur, and it was what it was. I'm not saying it was terrible, but we could have certainly done a lot better.

So, I'm like calling you Zach and saying, “Well, I feel like I'm hitting brick walls in my business, in my practice. And I feel like I'm spinning plates all the time, and I'm just challenged to try to reduce stress. Maybe I need a little bit more profitability. I'm working really hard right now, and I'm frustrated.”

How do you start to triage a guy like David Phelps, who probably sits in that seat that many of the people you work with?

Zach Hoskins: Yeah, I love that. So, the first thing that we do is we have a strategic treatment plan scorecard. And so, we call this ... obviously, you all know listening to the podcast what treatment plans are.

So, what I've created to kind of keep it a similar vocab is a strategic treatment plan. So, it's a strategic treatment plan for

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your practice. And so, what I've created is a strategic treatment plan scorecard that you can take. It basically is on a scale of 0 to 12.

And you rate yourself in these key areas of the business where you are now and where you want to be in a year. And so, that's the first step of saying like, "Okay, if we're not aware of where we're at now, then how do we know where to go? And is it even a good fit to continue to go?"

Or what if you take those scorecards and you're at twelves all across the board or if you're at zero — I just think always having some sort of scorecard, some sort of self-awareness or awareness of how you're doing that in your practice is a good thing.

So, that would be the first thing I would say. I would say, "Hey, let's sit down. Let's take this scorecard, let's see where you're at, and then devise a plan to move forward."

And the scorecard is basically broken down into key questions. And I believe that there's truly only five to six key questions, that when you have these answers to the questions, your life will ultimately get a lot better.

It's pretty simple. However, there's a difference between simple and easy. So, I say it's simple because there's a proven process that we can go through, a simple proven process that we answer the questions.

The tough part is whenever you have to actually go in and do it. And so, some things that I found (and I'll get into the questions here soon) — but just one aside here is if you are a visionary and you were to sit down with me and if we were to go through

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and answer all these questions, you could probably answer them off the top of your head.

Why do you exist? What do you stand for? Where are you going? All of those visionary-type questions. However, when the rubber meets the road is where you need that integrator, that office manager.

That person that whenever you put those answers on paper, they can take it, drive it into your practice, make it real on a day-in and day-out basis, and drive the consistency, the accountability, and ultimately, relieve stress for you.

So, getting into those questions, if you look at, we obviously need to know why do we exist? So, why do you walk into your practice day-in and day-out, flip the lights on, open everything up, get ready for patients, what is that why?

And so, you kind of have the Simon Sinek start with why, you've got all these why questions. I'm sure you've all heard of those; answer your why, or find your why.

So, you start with finding your why or answering the question, why do we exist? So, that makes up the first part of what I call your North Star.

And so, the second part of the North Star is: what do we stand for? And so, when you answer, "What do we stand for?" These are ultimately your core values. These are going to be what you're trying to impart on every member of the human race that walks through your doors, whether that be a team member, a client, anybody like that.

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And so, whenever you have your, “Why do I exist and what do I stand for?” You have this North Star that you can always look towards.

And so, when you have that North Star that you can always look toward — well, as you're looking towards that North Star, we're always going to be climbing mountains on our journey to getting to wherever we want to be.

As an entrepreneur, obviously, you know that things are challenging along the way, things are exciting along the way. We have peaks, we have valleys, but one thing we can always be assure of is that we're always going to be climbing to another peak.

And so, the next question is where are we going? So, we have our North Star; “Why do we exist? What do we stand for?” And so, then, we look towards that North Star, and we see the peak.

And whether that's a 5-year, a 10-year, a 25-year, whatever, that looks like some sort of vision, a big hairy, audacious goal to use Jim Collins, what does that look like? What's that peak look like that you can start to stare at that matches up with your North Star? To then reverse engineer down to the next question, which is, how do we get there?

And so, how do we get there breaks down that longer-term peak or longer-term vision into little base camps along the way of going up the mountain. Those could be 5-year, 3-year, 1-year, 90-day, weekly, daily.

You can see how if you start with your North Star, you hit “Why do we exist? Where are we going? How are we going to get there?” All of those different pieces can be reverse engineered down to, “Okay, what do I need to do tomorrow to consistently

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deliver on the path forward to ensure I get to where I want to go?”

And of course, we all know we've all been through crazy times, challenging times that maybe that peak doesn't even exist by the time you get three years down the road. Like sometimes those peaks can disappear.

Whether that's uncertain economic pressures, whether that's people, whether that's complete changes in the market, whether that's consolidation, whatever that looks like for you. But the goal is to at least have something on paper to start to drive towards.

So, we have why do we exist? What do we stand for? That's our North Star. Where are we going? Our peak. How are we going to get there? Our reverse engineered smaller pieces to get there. And then we have who's going to help? And I think that this is one of the biggest pieces.

If you don't have a structure chart lined out for your practice, this is the single most important piece in my opinion. Having a structure chart lining out exactly the roles and responsibilities that you need in your practice to deliver on what you need to be delivering on, it can provide so much clarity, so much accountability, so much transparency across the entire practice.

Once you get those thoughts on paper and shared with the team, that's literally been the number one game changer for us day-in and day-out.

David Phelps: So, Zach, with setting the North Star and then going to, where are we going? How are we going to get there down to the who's the structure chart? — Is this something that's created, worked on as a team in the culture?

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Or is this something that the visionary, the entrepreneur, basically should develop him or herself and then that's presented to the existing who's, how's this done?

Zach Hoskins: Yeah, great question. So, what I typically will find has gone best in my experience is working with the owner dentist and figuring out, typically, they have some leadership bent team members that would be great to have in the process of creating this together.

So, yes, I think we all know that we can go as visionaries, as the owner — we can go when we can create all of this and we can send it down to the team and hope that they get it and hope that they buy in.

But what a cool process to create more buy-in is to craft a small leadership team, whether you have them apply for it, whether you pick them, typically three to five individuals, depending on the size of your practice.

If you have multiple practices, we can talk through that. But typically, what I've found is yeah, it's a great collaborative process to figure out not just why you exist as a practice owner, but why the entire practice to kind of raise above just your kind of ideas or ideals, or vision for the practice, raise above.

And ultimately, what that's going to do is it's going to give you more buy-in, which is going to give you less stress in the long-term because to the degree that you can get buy-in and collaborate, and empower your team to help answer the question, “Why does this practice exist? What do we stand for? Where are we going?”

Well, then you're not going to have to be the one lone driver driving the stake, driving everything at the top basically saying,

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“This is where we're going, you're coming with me or you're leaving.”

Everybody's going to be like, “No, this is where we're going, and we get to go there together, and we built this together.” And so, it's been really cool to see before practices have worked on implementing an operating system similar to this.

And then after, you typically see this, “Wow, I was actually able to go on vacation because I finally was able to trust my team because they were all on the same page, or everybody was aligned and the accountability started happening and I didn't have to continuously be getting on to other people. It started to peer-to-peer accountability.”

There's examples like that across the board of how it relieves stress and increases, honestly, just the fun, even though the challenges are there day-in and day-out.

David Phelps: Leadership is a word that is bandied about all the time today. There's great books and there's seminars and trainings on leadership, and it's certainly a skill that I think very few or maybe it's only born with, but it's something you can acquire the skills.

And I think that's a big part of what we're talking about here is leadership from the visionary standpoint, but also having, as you said, that core group relative to the size of the organization.

But that core leadership — call it leadership executive team that has bought in — you've created together, you know you're all on the same page or working on the same goals.

And not just to the aspirations of the visionary outside of what's our purpose? Why are we here? People need to stand on that

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North Star. But people that work within an organization, they also have to have a personal why.

I mean, they need to feel empowered that they are important, that they are delivering value. That's part of the culture. And that's something that I know you helped ascertain. And sometimes in going through this process, no question about it, one may find team members that currently exist on the team that probably aren't going to be long-term members of that team. And that's part of the process.

Because as you said earlier, as visionaries, we're not usually the best equipped to have those difficult conversations. Because we're, again, moving fast, and we're not patient enough. And so, therefore, we oftentimes we'll tolerate certain things hoping that just magically something, some system or some person will just change.

And we realize after much frustration that that's not the way it's going to work. So, what you do is you help break the inertia that we tolerate many times way too long. Because we don't know how to go about it.

And I think, as you said, you can read Traction, it's a great book. Rocket Fuel again, I highly recommend. And people that ask me say, "Well, I'm pretty much ... I'm self-motivated." Got it. Yes, you are. No question you are. "I can read well. Yes, I can study these principles and probably understand." Yep, probably you can.

But the facilitation from somebody with the experience that you have in my life, when I want to go faster and get from a place where I am today to another level and whatever that is, might be a sports activity or something, or like some hobby, or in this case the business.

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Well, if I want to get there faster, yeah, I could certainly kind of be self-taught and that maybe can work to a point, but it's clumsier. I think having somebody that's been there and done it can speed that process up and take a lot of that frustration out of getting to where you want to go, would you say?

Zach Hoskins: Yeah, for sure. And another interesting kind of point to that: on a day-to-day basis, so I'm the integrator at Duckett Ladd, the dental CPA firm.

So, on a day-to-day basis, I see all of the different challenges, ins and outs of what it means to have a team, what it means to be an integrator, what it means to work with a visionary who has a ton of ideas, and is a wonderful leader.

And then a way to reverse engineer down what ideas we need to go implement and then see the follow through and make sure that things are working across the entire firm and business.

And so, the cool thing that I found too is, is to the degree that I'm on the boots on the ground kind of actually operating as an integrator, then I get to pull myself out, and I get to go and help others, which is my ultimate passion, is to go and help others achieve the life that they desire.

And so, I am an integrator, and I help implement the system. And so, I'm also using the system day-in and day-out. And so, that helps. Whenever I'm implementing, I can see the challenges that you've been a part of.

I've got a lot of these different tools, tips, tricks in my book of like, "Yeah, I have tough conversations all the time too." And so, to the degree that I can share those tools with you to help those conversations become simpler for you and to help you

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achieve results way quicker than you might have normally done it.

That's just stuff that I've seen on my experience from working in the business as an integrator. And so, it's awesome to be able to share that as well.

David Phelps: So, I wanted to get to where we got to meet. So, you brought that to the forefront. So, I'm going to give a two-for-one shout out here. Bill Ladd and Jared Duckett of Duckett Ladd CPA firm is who you work with, as you stated.

You are the integrator for them. And I know through many of our members in our community who utilize their accounting and CPA tax services, how they get five-star ratings all the time.

And that's not without having a system in place that manages, again, the client flow, client communications, client expectations. Those two gentlemen are very astute and very experienced in what they do. There's two of them.

I don't know, and I'm not asking how many clients that Duckett Ladd serves, but I know that there's great systems in place because over and over and over again, people say, "Wow, the experience has been great."

That's not easy to do in any, particularly in a service organization. That's not easy to do. So, that gives great credibility to what you do because of the ratings they get. So, I just want to bring that out, and you've worked with a number of our members in Freedom Founders, and they give you the same five-star ratings.

So, people know I'm reticent to hardly endorse a lot of people. I have some great interviews on these podcasts, and I love to

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bring great people, great thinkers, resources. But unless I've utilized them or have proximity like I do, I'm always going to be careful about like highly endorsing.

But today I am, because I do know the track record that you have, Zach, with your clients, and I know the track record that Duckett Ladd have with their clients, and many are obviously, mutual.

That's why you help the CPAs. They get into the business aspects with some of their clients, and they hear the frustrations, and they go, "Well, we can help you with the tax and the counting and the numbers," but you know what? You've got some other issues that I think could be helped as well.

And it helps the whole business organization to have under the expertise that you all bring. So, I just want to bring that out here today.

Zach Hoskins: Awesome. No, I appreciate that.

One thing I wanted to touch on — you kind of touched on it as far as like team members and something that we're seeing boots on the ground and everybody seeing it, is retention of team members, key team members. Turnover is high. It's hard to find new team members.

Something that I found with working with dental leadership teams, and this was one of these things that started to pull on my heartstrings. And so, I created a service for this.

However, what I've noticed is that office managers, operations managers, and integrators are alone. And if you don't know that they're alone, then ... yeah, I don't know if you've had a conversation with them.

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What I've noticed is that all of these integrators, office managers, and operations managers feel alone. And so, something I created was the Monthly Momentum Mastermind.

And so, typically, if you're listening to this, you've probably been a part of a mastermind or some sort of community where you could go and ask any question and be able to get feedback from others who might be in the same situation. When is your office manager able to do that?

So, something that I've created are small cohorts of office managers who are across the nation, and we are launching our next one very soon.

Our most previous one, it's so incredible to see, and I wish I could share all of the wonderful wins and successes that we've gotten in there. It's becoming a family of seven or eight office managers across the nation who in dire need.

“Hey, we just lost three hygienists. This is happening. What's going on?” They'll post it in this WhatsApp group, and the rest of these office managers will dive in and they'll just lob, “Hey, have you tried this? Hey, have you tried this? Hey, I understand you're going through that tough time.”

So, the reason I say that is if you are ever worried about losing your office manager, losing your integrator, losing your operations manager. If you want to give them another benefit, if you want to empower them to be thinking through how to minimize dangers, maximize opportunities, leverage strengths, especially during this economic uncertainty, plug them into a group period, whether it's mine or not.

But I'm noticing through conversations that they feel alone, and getting around others who are speaking their same language is

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absolutely a game changer for them, for your practice, ultimately, for you to relieve your stress if they're asking questions to these other office managers, maybe not looking to you all the time for the answer,

David Phelps: Well, and we're not capable of giving them what they need. They need to have, as you said, cohorts that sit in the same position and dealing with the same stressors. And you're so right. Providing the kind of support that your key team leaders need, in this case, the integrator is so important.

Because they want to serve well. It's in their heart, but if they feel like they have to ask too many questions or if they're getting stressed out, which there's a lot of stress in that position, you said they feel alone, then that could be a reason why they might leave.

Not that they don't like you or like your mission or you North Star, but they may leave because the stress is too much. And if you don't have a place to get that out, and like you said, have a tribe of people that understand what you're dealing with and give suggestions, that is a mastermind.

And we know as visionaries, most of us have been part of masterminds, we realize how important that's for us. But what about our key people? Where do they get the support?

I think it's brilliant, and I'm glad you brought that up because I think it's a key piece that's probably missing in most — I'll call it coaching practice management. That's an aspect that's missing.

And you bring the pillars of the key elements that are the drivers to create that culture and that momentum that we as

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entrepreneurs aspire to have and yet, seems like it's so far out of reach.

I appreciate you being here, Zach. It was a great conversation. We're going to put in our show notes; we'll list, I've got the different websites and connection points. Is there one that you'd like to give me that would be the best one to go to website? Would that be duckettladd.com?

Zach Hoskins: That's right. Yeah, duckettladd.com. You can find us on there. You can follow us on YouTube, Instagram, Facebook; we're out there. And it's our goal to strive every day to make the lives of our team members and clients better.

So, anything we can do, we're always in your corner, always cheering you on, encouraging, supporting, striving to get you to the life and the practice that you desire and deserve, so-

David Phelps: Well, I know where your heart is. We've spent enough time together. I know that's how you serve, with high integrity and authenticity all the way.

So, I would encourage anybody who's listening today, if this has stirred some of those emotions and these frustrations that I know that we all feel too often, too regular basis, it'd be worth a connection with Zach just to talk it through.

I know you'd be happy to have that conversation with somebody without obligation, but just to see whether it could be the opportunities that they could have that life that they desire to have.

Zach Hoskins: Absolutely. Thanks, David.

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