



# Vision/Traction Organizer (V/TO)

## Introduction

The Vision/Traction Organizer (V/TO) is a foundational tool used in the Entrepreneurial Operating System (EOS) to help businesses define and achieve their vision. For dentists, this tool is particularly valuable as it not only helps in setting clear goals for the practice but also in aligning those goals with personal life aspirations. In this course, we will explore how the V/TO can be applied to both your dental practice and personal life to create a harmonious balance and a clear path to success.

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## Week 1: Vision – Defining Your Future

### Session Objectives

- Understand the importance of a clear vision.
- Develop a comprehensive vision for your dental practice and personal life using the V/TO.

### TOPICS COVERED

#### Understanding the V/TO

What is the V/TO? The V/TO is a strategic planning tool that captures the vision for your organization and outlines the key steps needed to achieve it. It includes components like core values, core focus, 10-year target, marketing strategy, 3-year picture, 1-year plan, quarterly rocks, and issues list.

#### Why Use the V/TO?

- Provides clarity and direction for your practice.
- Ensures alignment between your professional goals and personal life aspirations.
- Facilitates better decision-making and prioritization.

#### Components of the V/TO

**1. Core Values:**

- Define the fundamental principles that guide your practice and personal behavior.
- Exercise: Identify and list your core values.

**2. Core Focus:**

- Determine your practice's purpose and niche.
- Exercise: Write down your core focus and how it aligns with your personal goals.

**3. 10-Year Target:**

- Set a long-term goal for your practice.
- Exercise: Establish a 10-year target that reflects both professional aspirations and personal dreams.

**4. Marketing Strategy:**

- Outline your unique selling proposition and target market.
- Exercise: Develop a marketing strategy that resonates with your core values and focus.

**5. 3-Year Picture:**

- Visualize where you want your practice to be in three years.
- Exercise: Create a detailed picture of your practice's future, including personal milestones.

**6. 1-Year Plan:**

- Define specific goals for the next year.
- Exercise: Break down the 3-year picture into achievable one-year goals.

**7. Quarterly Rocks:**

- Identify key priorities for the next quarter.
- Exercise: Select quarterly rocks that will move you closer to your 1-year plan.

**8. Issues List:**

- Maintain a list of obstacles and challenges to address.
- Exercise: Start an issues list to tackle potential roadblocks.

**APPLYING THE V/TO TO DENTISTRY AND PERSONAL LIFE**

**Professional Application**

- Use the V/TO to streamline practice operations, improve patient care, and achieve financial goals.
  - Example: A 10-year target might be to become the most trusted family dental practice in your city.

**Personal Application**

- Align your professional vision with personal life goals to ensure a fulfilling and balanced life.

- Example: If a personal goal is to spend more time with family, your 1-year plan might include delegating more tasks to your team to free up your time.

## **Interactive Elements**

- Group discussion on core values and how they influence both professional and personal decisions.
  - Breakout sessions to draft initial versions of the V/TO components.
  - Case studies of successful dental practices that have used the V/TO to align their business and personal goals.
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## **CONCLUSION**

### **Recap**

- The V/TO is a powerful tool for setting and achieving goals in both your dental practice and personal life.
- By clearly defining your vision and the steps needed to achieve it, you create a roadmap that guides your decisions and actions.

### **Call to Action**

- Continue refining your V/TO and use it as a living document to guide your journey.
- Apply the principles learned in this session to both your professional and personal life for a harmonious and successful future.

*By integrating the V/TO into both your dental practice and personal life, you ensure that your efforts are aligned, your goals are clear, and your path to success is well-defined.*

**Title:** Vision /Tracker Organizer (V/TO) Template

**Content:**



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**How to Use This Template** *(Proceed to following page)*

**1. Core Values:**

- Identify the guiding principles for both your professional and personal life. These values will influence your decisions and actions.

**2. Core Focus:**

- Define the purpose and niche of your practice to stay focused on what matters most.

**3. 10-Year Target:**

- Set a long-term goal that reflects your ultimate vision for your practice.

**4. Marketing Strategy:**

- Determine what makes your practice unique and who your ideal patients are.

**5. 3-Year Picture:**

- Create a detailed picture of where you want your practice to be in three years, including key metrics.

**6. 1-Year Plan:**

- Break down your 3-year picture into specific goals and initiatives for the next year.

**7. Quarterly Rocks:**

- Identify the top priorities for each quarter to stay on track toward your annual goals.

**8. Issues List:**

- Keep track of obstacles and challenges to address them proactively.

# Vision/Traction Organizer (V/TO)

## Core Values

*Define the fundamental principles that guide your practice and personal behavior.*

- **Core Value 1:** \_\_\_\_\_
- **Core Value 2:** \_\_\_\_\_
- **Core Value 3:** \_\_\_\_\_
- **Core Value 4:** \_\_\_\_\_
- **Core Value 5:** \_\_\_\_\_

## Core Focus

*Determine your practice's purpose and niche.*

- **Purpose:** Why does your practice exist?  
\_\_\_\_\_
- **Niche:** What is your specific area of expertise?  
\_\_\_\_\_

## 10-Year Target

*Set a long-term goal for your practice.*

- **10-Year Target:** Where do you want your practice to be in 10 years?  
\_\_\_\_\_

## Marketing Strategy

*Outline your unique selling proposition and target market.*

- **Unique Selling Proposition:** What makes your practice unique?  
\_\_\_\_\_
- **Target Market:** Who are your ideal patients?  
\_\_\_\_\_

## 3-Year Picture

*Visualize where you want your practice to be in three years.*

- **Future Vision:** Describe your practice's future in three years.  
\_\_\_\_\_

- **Key Metrics:** List key metrics (e.g., revenue, number of patients).
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## 1-Year Plan

*Define specific goals for the next year.*

- **Annual Goals:** What do you want to achieve in the next year?
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- **Key Initiatives:** What key initiatives will help you reach these goals?
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## Quarterly Rocks

*Identify key priorities for the next quarter.*

- **Q1 Rocks:** \_\_\_\_\_
- **Q2 Rocks:** \_\_\_\_\_
- **Q3 Rocks:** \_\_\_\_\_
- **Q4 Rocks:** \_\_\_\_\_

## Issues List

*Maintain a list of obstacles and challenges to address.*

- **Issue 1:** \_\_\_\_\_
- **Issue 2:** \_\_\_\_\_
- **Issue 3:** \_\_\_\_\_
- **Issue 4:** \_\_\_\_\_
- **Issue 5:** \_\_\_\_\_

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## CONCLUSION

By regularly reviewing and updating your V/TO, you can ensure that your practice stays aligned with your vision and goals, both professionally and personally.

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## Download Link

 <https://www.worksmart.com/wp-content/uploads/2023/02/EOS-VTO.pdf>

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**Title:** Vision Statement Worksheet

**Content:**



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## Vision Statement Worksheet

### Professional Goals:

- What do you want to achieve in your practice?
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### Personal Goals:

- What personal milestones do you want to reach?
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### Financial Goals:

- What financial targets do you aim for?
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### Your Vision Statement:

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