

**Enhancing Your Referral Relationships**

**Presented by David Schwab, Ph.D.**

**AAP Meeting, Seattle, Washington**

**Sunday, September 7, 2008**

**2:00 pm to 4:30 pm**

**Presented by David Schwab, Ph.D.**

**(888) 324-1933**

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## David Schwab Biographical Information

David Schwab, Ph.D., presents practical, user-friendly seminars for dentists and team members, with a special emphasis on periodontal practices. Fast-paced, filled with humor, and overflowing with “pearls,” Dr. Schwab’s seminars are as popular as they are useful.

An internationally known seminar speaker and practice management consultant who works exclusively with dental professionals, Dr. Schwab has previously served as Director of Marketing for the American Dental Association and as Executive Director of the American College of Prosthodontists.

At the present time he runs his own marketing consulting firm, David Schwab & Associates, Inc. The company provides in-office seminars and other practice management services for fee-for-service dentists in the U.S. and Canada. Dr. Schwab works extensively with Directors and Members of Seattle Study Clubs.

Dr. Schwab’s practice management and marketing articles have appeared in numerous publications, including the Journal of the American Dental Association, Dental Economics, and the Journal of the Canadian Dental Association.

He also publishes The Personal Report, a practice management and digital technology newsletter for periodontists and oral and maxillofacial surgeons.

Dr. Schwab holds a Ph.D. in English from Northwestern University.

He lives in the Orlando, Florida area with his wife and two children.

## CORE MESSAGES

1. Personal Touch. We believe in treating each patient as a friend as well as a patient. We take the time to get to know you, listen to your concerns, and provide you with treatment options. By relating to each patient in a kind and compassionate manner, we establish a relationship built on mutual trust.
2. Commitment to Excellence. We use state-of-the-art materials and techniques to ensure the best possible results. We attend many continuing dental education courses to keep abreast of the latest advances in periodontics.
3. Thorough. The atmosphere in our office is calm and professional. We conduct a thorough examination on each patient when they come to our office for care. We always take the time to explain procedures and answer your questions.
4. Patient-Centered Practice. The most important person in our practice is you, the patient. We use a diagnostic-based strategy to improve and maintain the long-term dental health of each patient. We also strive to provide not only excellent clinical dentistry, but excellent customer service, as well.
5. Collaboration with Your Dentist. We work closely with your dentist and other health-care professionals to give you the best treatment possible in terms of your overall health.
6. Meet and Exceed Expectations. In our office, we offer a wide range of services, including, but not limited to, treatment of periodontal disease, dental implant therapy, and periodontal plastic surgery, , as well as preventive services such as periodontal cleanings. Many patients are surprised by the range and quality of services we offer. Our goal is to meet and exceed your expectations.

Date

Mrs. John Smith  
123 Main Street  
Anytown, USA 12345

Dear Mrs. Smith:

I want to extend to you my personal greetings and a very warm welcome to our periodontal and dental implant practice. My staff and I are committed to doing everything possible to provide you with excellent periodontal or implant care and also to make your visit to our office as pleasant and as comfortable as possible.

The following information will be very useful to you:

- At the time of your first appointment, I will listen closely to your concerns and conduct a thorough examination. I will subsequently review my findings and discuss my recommendations with your dentist.
- Periodontal disease is a progressive condition caused by bacteria. If left untreated, periodontal disease leads to the loss of teeth and supporting bone. With professional care, however, the disease can be managed. After surgical treatment, patients are scheduled with our registered hygienist for regular supportive periodontal therapy visits to help keep their mouths healthy. We also provide our patients with detailed home care instructions to help them maintain their oral health between visits.
- In addition to treatment for periodontal disease, we also provide the surgical placement of dental implants. Following this procedure, the patient's dentist creates and places the replacement teeth to complete the restoration. Dental implants are extremely stable, predictable, and very natural looking.
- To help keep our patients as comfortable as possible, we use various forms of anesthesia that we will discuss with you prior to treatment. Prescription medicine may be recommended to keep patients comfortable the first few days after surgery, and of course follow-up visits are scheduled so that we can monitor our patients after treatment.

- In implant cases and in many other situations, it is necessary for us to work closely with your dentist to provide our patients with the benefits of our combined expertise.

Once again, welcome to our periodontal and dental implant practice. We pledge to do our best to give you thorough, excellent care in a supportive and caring environment.

Sincerely,

Signed by periodontist

P.S. If you have any questions, please feel free to call us at [phone number].

P.P.S. Our patients tell us that it is very useful for them to access our web site prior to their first visit. Please visit us on the web at [web address].

## Tracking Patients Who Do Not Accept Treatment

- Consultation Appointment
- Follow-up phone call (One week later).
- Post-consultation letter (Two weeks later).
- Second phone call (Two months later).

### Steps Listed in Detail

#### Consultation Appointment Sets the Stage for Follow Up.

At the time of the consultation appointment, if the patient does not accept treatment:

- When you have questions, not if you have questions.
- Ask this question, “How do you think this treatment will benefit you?”
- Ask for permission to follow up: “Would it be o.k. if our treatment coordinator calls you to follow up”?

#### Follow-Up Phone Call Scripts.

If you call the patient and get an answering machine, leave a message with your number. If there is no response within one week, call again. If you get the machine a second time, leave another message. If there is no response after two messages, do not call again.

If staff is successful in speaking to the patient by phone, the script should be as follows:

*Hello, Mrs. Smith. This is \_\_\_\_ from Dr. Smile’s office. I am calling like we promised. I know that Dr. Smile reviewed some treatment options with you when you were here. I am calling to follow up. What questions do you have that I may be able to answer for you?*

Even if the staff has answered all questions, it is a good idea in some cases for the doctor to call the patient. (Note, this does not apply to questions about financial arrangements. Staff should answer these questions and the doctor should not need to call the patient to discuss finances.)

*Mrs. Smith, I’m also going to ask Dr. Smile to speak to you personally to answer that question. He’s with a patient right now, but he could call you back at about \_\_\_\_ o’clock. Would that time be convenient for you?*

When the doctor calls the patient, he or she will give the patient the same answer/information as the staff in order to reinforce the message. Then, the doctor finishes the phone call as follows:

[This is the doctor speaking.] *Do you have any other questions, Mrs. Smith?* (If there are no other questions, then the doctor continues as follows.) *When you were speaking to Marsha earlier today, did she schedule your treatment?* (The answer will be no.) *Would you like me to put her on the line now so you can schedule?*

Note that if the patient is definitely not interested, then there is no need for the doctor to call and there is no more follow up. If the patient is still interested but not ready to schedule, then ask for permission to call again.

*It was a pleasure speaking with you, Mrs. Smith. Would it be o.k. if we followed up with you again at some point in the future?*

If the patient says yes, then call again in two months.

SAMPLE POST CONSULTATION LETTER FOR IMPLANTS  
Information in square brackets [like this] is customized.

Dear Mrs. Smith:

It was a pleasure to see you in my office recently regarding your dental implant treatment. [It was also a pleasure to meet your husband, Harvey.] Dental implants offer many benefits, such as:

- Natural appearance.
- Natural chewing function.
- Never develop decay.
- Never require root canals.
- Preserve bone to prevent the appearance of premature aging.
- Scientifically proven track record.

Dental implants are a scientific marvel that function much like natural teeth and enable patients to laugh, eat, chew, and smile with great confidence.

[You mentioned that your parents lost their teeth at an early age. I know from our conversation that you do not want to wear conventional dentures. Fortunately, there is now a much better alternative to tooth loss than old-fashioned dentures.]

Please call our office with any questions or to schedule the first phase of your treatment.

Sincerely,

John Smile, DDS

### Visiting general dentists as part of an outreach program.

Phase One: Meet, Greet, and Treat. In this phase, the treatment coordinator will spend one-half day per week visiting offices. While she will of course include those dentists who are already good referral sources, she will also visit dentists who refer only occasionally as well as those who rarely or never refer. Depending on the locations of the offices, the treatment coordinator can visit up to 6 offices per week during her one-half day working outside the office. If one subtracts holidays, vacation time, and other times when visits would be impractical, there are approximately 40 weeks per year that could be devoted to this activity. The goal, therefore, is to conduct a meet, greet, and treat with 240 offices per year (6 per week x 40 weeks = 240 offices). It should be noted that at least 80% of the visits should be first visits, but up to 20% may be repeat visits to offices that have already been visited within a twelve-month period.

### Meet, Greet, and Treat Protocol

The treatment coordinator calls a general dentist's office and says to the person who answers the phone: "I'm going to be in the neighborhood tomorrow at about (time) and I would like to drop by the office for a few minutes. Are you working tomorrow?"

If the staff says that the office will be closed or that the doctor is booked very heavily, another time should be chosen. On the other hand, if treatment coordinator feels that she will be well received, then the impromptu visit is on. The treatment coordinator should drop off 10 copies of the periodontist's referral cards and treats for the staff. Also, the treatment coordinator should ask two key questions. My comments appear in italics.

### Tell me about the mix of services you offer in your practice.

*The first few items they mention are significant, because they are what marketers call "top of mind." If, for example, they mention fillings first, then they may be doing more single-tooth dentistry than anything else. You want to find out if they are likely to refer and whether their philosophy of treatment includes comprehensive treatment planning.*

### How do you like specialists to communicate with you?

*You can tell right away whether they are accustomed to referring cases to specialists and you get insights into how they judge a referral relationship.*

If possible, of course, the treatment coordinator should try to meet the doctor personally to say hello.

Following the contact, the treatment coordinator should complete the Professional Contact Tracking Form and also send the office a brief hand-written thank-you letter stating that it was a pleasure to meet them and that you are looking forward to working with them.

Professional Contact Tracking Form

Name of Doctor(s): \_\_\_\_\_

Name(s) of Key Office Staff: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Type of Practice : \_\_\_\_\_

Date of Office Visit: \_\_\_\_\_

Date Thank-You Note Sent: \_\_\_\_\_

Recommendation to the doctor regarding follow-up at this time: \_\_\_\_\_YES      \_\_\_\_\_NO

Rationale for Recommendation:

Other Comments/Impressions:

\_\_\_\_\_  
Signature of Treatment Coordinator

Phase Two: Lunch and Learn. For this phase, the periodontist has a lunch arranged for the dentist and his or her staff at the dentist's office, and the periodontist uses the opportunity to make a 30-minute presentation. The stated purpose is to educate the staff, because it is less threatening to the dentist if the periodontist is there to educate staff members who may not be totally aware of the latest clinical information in periodontics. Reaching out to the staff is important, because staff are often instrumental in the referral process. At the same time that the general dentist's staff is being educated, of course, the dentist is also learning the benefits of referring to the periodontist.

Only about 15% of the offices that the treatment coordinator visits will be judged to have sufficient potential to merit Phase Two. This means that the periodontist should plan on conducting one Lunch and Learn per week (using the 40 weeks that are available) for a total of 40 Lunch and Learns annually.

### Lunch and Learn Protocol

The purpose of the lunch and learn is to educate the doctor and staff regarding periodontics. To satisfy the “lunch” part of the lunch and learn, you will need to have lunch brought in for the entire team.

The lunch and learn should be directed as much to the staff as to the doctor, because most staff in general dentist’s offices do not fully appreciate what periodontists do, and they frequently cannot adequately explain to patients the reason for the referral.

The presentation should have a beginning, middle, and end and it should be organized around a theme—such as implant treatment or restoring teeth after a root canal.

It is always a good idea to use audiovisuals. These can be in the form of a PowerPoint presentation or hard copies of photos or radiographs.

At the end, ask for questions and also ask whether the presentation has been helpful. Ask if they have a sufficient supply of brochures and referral cards, and tell the dentist that you would like to [start or continue] working with him/her. After the presentation, send a brief, hand-written thank you note to the practice for taking the time for the presentation and state that you would like to starting working/continuing working with them.

Phase Three: Follow-up Visit. For those practices that respond to Phases One and Two by referring patients (or increasing their referrals), Phase Three should be implemented. For Phase Three, the treatment coordinator stops by the referring office to conduct a raffle. Each staff member in the referring offices places their name in a hat, and the winner receives a \$100 gift certificate. (A very good gift certificate is one that allows the recipient to use it at any store in a particular shopping mall.) Phase Three should also be used to reward top referring offices who have historically supported the practice.

#### Phase Three Protocol

This protocol should be reserved for those offices that are already top referring practices or those that become good referral sources. Since each office will receive a total of \$200 in gift certificates, the total number of offices that should be included must be limited for budget reasons. It is recommended that the budget be set at \$2,000 to \$4,000—a total of 10 to 20 offices per year. The appeal of Phase Three is not only does it provide a way to thank offices for referrals, but it also uses the principle of “random interval reinforcement.” This is the same psychological principle that causes people to drop coins into slot machines—they never know when the machine will pay off. Offices that receive an unexpected gift often continue to refer or increase their referrals in hopes of getting another Phase Three visit from the treatment coordinator in the future.

## Leadership and Strategic Planning

Hold On. The essence of the practice, the strengths, the fibers of our collective being that hold us together and make us who we are. This is not about personalities but about the characteristics, ethos, traits, and unique features that we must cherish as our core values and most distinctive attributes.

Take On. This either means to do projects (e.g., have new carpet installed in the reception room), or it means to confront an interpersonal problem in the office in a positive and constructive manner.

Let Go. What do we need to get rid of (systems, protocols, equipment, attitudes, forms) that no longer works? This is not about people but about ways of doing things that have outlived their original rationales.

Move On To. What is our goal, our vision, our objective for a future date? What will our ideal schedule look like a year from now? Do we want more production, higher case acceptance, more referrals, less stress, the same income with fewer days worked? In other words, when we talk about “taking the practice to the next level,” what specifically do we mean?

What Do You Say When the Patient Says . . . .

1. If this is not covered by my insurance, then I don't want it.
  
  
  
  
  
  
  
  
  
  
2. So, am I going to be paying for the doctor's new car?
  
  
  
  
  
  
  
  
  
  
3. Why don't you accept my insurance plan?
  
  
  
  
  
  
  
  
  
  
4. Can I wait and do this later?
  
  
  
  
  
  
  
  
  
  
5. I'll think about it.

6. You charge a lot more than some other dentists.
  
  
  
  
  
  
  
  
  
  
7. Can you find out what my insurance company will pay before I decide to have this procedure?
  
  
  
  
  
  
  
  
  
  
8. Why didn't anyone tell me about this problem before?
  
  
  
  
  
  
  
  
  
  
9. I had no idea implants were so expensive.
  
  
  
  
  
  
  
  
  
  
10. I can't afford it.

11. Why don't you have evening or Saturday appointments? Your schedule is not convenient for working people.

12. I know I should do something, but I just can't make up my mind.

13. Can I have all my cleanings in your office?

14. I think I should get a second opinion.

15. How much is doctor restorative going to charge me for the crowns?

## FACT SHEET ON DENTAL IMPLANTS

### DENTAL IMPLANTS:

- are the most advanced tooth replacement system ever devised.
- help preserve the jawbone to prevent the appearance of premature aging.
- look and function like natural teeth.
- are placed/restored in the doctor's office with minimal discomfort.
- improve comfort, appearance, speech.
- have a 95% success rate.
- allow you to eat the foods you love and talk, smile and laugh with confidence
- represent a conservative treatment option—adjacent teeth are left untouched.
- never develop decay.
- never require root canals.
- can provide great stability for a lower denture.
- can completely eliminate the need for a denture.
- can help people of any age
- give patients a third set of teeth that are natural looking and very long-lasting.

Ask yourself the following questions:

Are you missing one or more of your natural teeth?

Do you have a complete or partial denture that is no longer completely comfortable?

Have you ever been embarrassed by a denture or a bridge?

If you answered "yes" to one or more of these questions, call us today at (phone number) to schedule an evaluation appointment. We would be pleased to evaluate your oral health and discuss treatment options with you.

## Teach Them How to Refer

### Implant Referral Checklist:

When there is collaboration between the restorative dentist and the periodontist, the patient will need to see the periodontist for an evaluation before any implant treatment can begin. Restorative dentists refer patients to periodontists for implant evaluations and assume that the patient will follow up. *However, only 40-50% of patients referred to periodontists for implant consultations actually call the periodontist's office and make an appointment.*

To increase case acceptance, the referral process needs to be strengthened.

Here is an implant referral checklist:

- \_\_\_ Introduce the concept of implants to the patient (use attached talking points).
- \_\_\_ Mention the periodontist by name and express confidence in him.
- \_\_\_ Ask the patient to commit to making an appointment with the periodontist.
- \_\_\_ Give patient written information about the periodontist.
- \_\_\_ Fill out and send referral card, fax referral form, or on-line referral form.
- \_\_\_ Offer to call the periodontist's office for the patient while *they are still in your office.*
- \_\_\_ Explain that dental implant treatment requires the expertise of both doctors. You are not "sending the patient away" for care. Instead, you are asking the periodontist to evaluate the patient so he can perform his part of the treatment, but you will complete the treatment by fitting the patient with replacement teeth in your office.
- \_\_\_ If the subject comes up, explain that you cannot quote a fee until both you and The periodontist have made an evaluation and had the opportunity to confer on a specific treatment plan. But also reassure that patient that there will be a full discussion of fees and payment options prior to any treatment.

### Talking Points to Educate Patients About Dental Implants

*(Note: These talking points should be used in addition to any visual aids or computer patient education systems in your office. They are designed as a quick, one-page reference sheet to communicate essential information concisely to patients.)*

**Introduction.** You could benefit from dental implants. Dental implants are the most natural tooth-replacement system ever devised. In simple terms, dental implants are artificial tooth roots that are very stable. We put replacement teeth over the implants and the result is a tooth replacement system that is stable and natural-looking.

**List of benefits.** Dental implants are extremely stable and look and function like natural teeth. You can chew, smile, eat, laugh very naturally and with total confidence. They eliminate virtually all the drawbacks of old-fashioned dentures. And, dental implants help preserve bone, which prevents the appearance of premature aging.

**Getting More Information.** You owe it to yourself to get more information. We work very closely with the periodontist, a specialist who is an expert in the placement of dental implants. I have complete confidence in him/her. The periodontist places the implants in his/her office and we fit you with natural looking teeth over the implants in our office. The periodontist will give you all the information so you can make an informed decision. We'll be happy to call his office now to help you set up an appointment.

**Questions About the Cost of Dental Implants.** Dental implants are replacement body parts that improve quality of life. They are designed to last a lifetime. After you have your examination and consultation with the periodontist, we will discuss the specifics of your case and determine a treatment plan. You will know the exact fees ahead of time and of course we will answer all your questions. Both offices offer extended payment plans through an outside company so you can stretch out payments over time. Our financial coordinator can give you all the details.

Questions About Potential Discomfort. Dental implants are placed in the periodontist's office. Most patients report that they have little discomfort. This is an issue that you should discuss at length with the periodontist.

Dental Makeover. If you have ever seen t.v. shows such as *Extreme Makeover* you know that when people receive treatment, they are very happy with the result. It is amazing how dental implants can improve the quality of people's lives and give them renewed confidence.

### V.I.P. Satisfaction Survey

You are a V.I.P. (Very Important Patient) in our office. Please take just a minute to complete this brief survey. Your comments are important—and very much appreciated!

Rate the office on a 1-10 scale, with 1 indicating poor and 10 indicating outstanding. Please circle your response:

- Courtesy and professionalism of the office staff you spoke to on the telephone.

1   2   3   4   5   6   7   8   9   10

- Courtesy and professionalism of the office staff you dealt with in person in the office.

1   2   3   4   5   6   7   8   9   10

- Courtesy and professionalism of the doctor.

1   2   3   4   5   6   7   8   9   10

- Cleanliness and appearance of the office.

1   2   3   4   5   6   7   8   9   10

- Thoroughness in answering your questions and concerns.

1   2   3   4   5   6   7   8   9   10

- Promptness in seeing you after you arrived at the office.

1   2   3   4   5   6   7   8   9   10

- Your overall impression of us.

1   2   3   4   5   6   7   8   9   10

Please use the back of this form to write any additional comments. Please drop the completed survey in the box marked “V.I.P. Surveys.” Thank you for your help! It is a pleasure to serve you.

### V.I.P. PATIENT SURVEY

Our goal is to provide you with the best possible care, and patient satisfaction is extremely important to us. You are a V.I.P.—a Very Important Patient. Please take just a moment to give us your feedback on these brief questions and return the survey in the stamped, self-addressed envelope. Your comments will be confidential unless you want to provide your name.

How will the treatment you received benefit you?

What advice would you give to others who are considering similar treatment?

Please comment on your perceptions of the financial investment versus the benefits you received.

Dr. Smile is accepting new patients. What would you say if someone asked you to give your opinion of Dr. Smile?

Name (optional): \_\_\_\_\_

***27 Reasons Patients Accept Treatment***

1. Emotional connection with practice.
2. Perceived need for treatment.
3. Clear explanation of treatment options.
4. Comfortable environment.
5. Treatment offers specific benefits.
6. Value proposition is positive.
7. Visualization (patient image post-tx).

***27 Reasons Patients Accept Treatment***

8. Excellent follow up.
9. Collaboration with other doctors.
10. Patient buy-in/participation.
11. Credibility of doctor and practice.
12. Compelling visuals (show and tell).
13. Patient testimonials.
14. Success stories.

***27 Reasons Patients Accept Treatment***

15. Relevant statistics.
16. Guarantee of quality.
17. High tech office.
18. Definitive treatment--do it once.
19. Patient happy someone listened.
20. Personalized care.
21. Consistency of practice experience.

***27 Reasons Patients Accept Treatment***

22. Excellent treatment coordinator.

- 23. First-class customer service.
- 24. Extended payment plan.
- 25. Service does not end with the sale.
- 26. Improved self-esteem.
- 27. Improved function/health/esthetics.

***A.A.F.T.O.: Always Ask for the Order***

When you do not present treatment, you have a 0% success rate.

***Three-Question Close***

- How do you think this treatment will benefit you?
- Are you interested in \_\_\_\_\_?
- If you were going to schedule treatment, when would you like to start?

***Probability Close***

- On a scale of 1 to 10, with 10 meaning you are ready to start treatment, where are you right now?

***Last Barrier Removed***

- If your concern about \_\_\_\_\_ could be resolved to your satisfaction, would you be ready to start treatment?

***Measure to Get Results***

- “If you can measure it, you can improve it.”

--Tom Peters

***'LET ME THINK IT OVER'***

- What additional questions do you have?
- If you have definitely decided not to go forward with treatment, then it is o.k. to tell me now.
- What concerns do you have that are causing you to hesitate?
- How do you think this treatment will benefit you?

***Common Characteristics of Underachievers***

- Frankenstein problem
- Procrastination
- Suffer in silence
- Romance ideas/drop the details
- Filibuster

***Common Characteristics of Underachievers***

- Let inmates run the prison
- Set practice on autopilot
- Perfect is the enemy of the good
- Resistant to change »» paralysis
- Deny rather than confront

***Common Characteristics of Overachievers***

- Head, Heart, Hands
- Focus
- Run practice like a business
- Contagious enthusiasm
- Translate vision into action

***Common Characteristics of Overachievers***

- Compartmentalize
- Promote
- Decide, act, move on
- Invest
- Powerful partnerships

Find out how you can sponsor David Schwab's seminar "101 Ways to Improve Your Practice." This seminar is for your referring doctors and their staff.

Increase Referrals by Building Relationships with Key Referring Dentists. Ask about the Comprehensive Communication Program.

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website: [www.davidschwab.com](http://www.davidschwab.com)

## Recommended Reading from David Schwab's Bookshelf

Ariely, Dan. Predictably Irrational. Harper Collins, New York, 2008

Buckingham Marcus and Donald O. Clifton. Now Discover Your Strengths. The Free Press, New York, 2001.

Gerber, Michael E. The E Myth Revisited. Harper Business, New York, 1996.

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Lencioni, Patrick. Five Dysfunctions of a Team. Jossey-Bass, San Francisco, 2002.

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Michelli, Joseph A. The Starbuck's Experience: 5 Principles for Turning Ordinary into Extraordinary. McGraw-Hill, New York, 2007

Moore, John. Tribal Knowledge: Business Wisdom Brewed from the Grounds of Starbucks Corporate Culture. Kaplan Publishing, Chicago, 2006.

Tracy, Brian. Focal Point. AMACOM, New York, 2002.

Tracy, Brian. Goals! BK, San Francisco, 2003.

Welsh, Jack. Winning. Harper Collins, New York, 2005