Module Five:

GROWING A THRIVING PRACTICE

Systems for Success

How to Run and Expand Your Clinic

Outstanding Client Care for Superb Clinical & Business Results

July 2015 Edition

With Michael C Gaeta, DAc, MS, CDN, LMT

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MODULE FIVE: GROWING A THRIVING PRACTICE
SYSTEMS FOR SUCCESS

With Michael Gaeta, DAc, MS, CDN

Seminar Description
Health professionals need emotional maturity, expertise in treating people, and business skills. In this seminar, you will learn practical, effective and ethical business systems, based in self-cultivation, integrity and a spiritual perspective. This is the systems module, on how to run and expand the daily operation of a successful practice and provide superb patient care for outstanding clinical and business results. Topics include telephone skills, cancellation policy, how to do the crucial first well, charting, patient communication, report of findings, time management, walking the charts, sliding scale, best practices, and handling your mistakes.

Seminar Goals & Objectives
By completing this program, the participant will be able to:
1. Understand the flow of treatment from hello to maintenance care
2. Discover the importance of the patient’s first visit; do an excellent initial evaluation
3. Learn how to communicate well with clients
4. Manage time well and create a good cancellation policy
5. How to grow and expand your practice

Participant Comments on this Seminar
“Provided a very comprehensive view of how to manage a practice. It was nice to learn from someone who has a lot of experience in the field.” – Anonymous, LAc

“Module Five seemed very practical and informative. I will definitely attempt to implement several of the suggestions outlined in these modules.” – Jonathan G., LMT
“Real-life vignettes about your patients and your practice – I liked that best and found it most helpful. I liked the way you tailored this presentation to our group.” – Melissa M., LAc

“Nice handouts, great content, good discussion. Positive and healing presentation style.”
– Andrew B., LAc
“I liked being able to be knowledgeable of my self-worth and learning how to ask for payment. It was a great knowledge.” – Shawn N., ABT

“Common sense practice building & motivation to succeed. Change nothing – it was great! Thank you, Mike.” – Anonymous

“There are a lot of very good ideas which should help practitioners handling business very much.” - Jianhaa Jin, ABT

About the Presenter
Dr Michael Gaeta is a visionary educator, clinician and writer in the field of natural healthcare. His purpose is to create a world of vital, resilient people who find fulfillment through positive contribution, and stay out of the medical system. Michael works with natural health professionals who want to improve their patient care and practice success—through his one-year clinicians’ mentoring program, live seminars and webinars, and distance learning programs. He holds licenses in acupuncture, dietetics-nutrition and massage therapy, and is a doctor of acupuncture in Rhode Island. Michael earned his master’s degree in acupuncture from the New York College of Health Professions, where he was a faculty member for ten years. Michael’s teaching is informed by 25 years of successful clinical practice, in his New York and Colorado clinics, helping thousands of patients improve their well-being, prevent illness, and choose a lifestyle of “nature first, drugs last”. He co-founded Acupuncture for Veterans, which provided free treatments in New York City. Michael is past president of the Acupuncture Society of New York, earning awards for State Association President and State Association of the Year. He appeared on the CBS Early Show and NBC News, and has trained thousands of clinicians in his Success with Natural Medicine clinical seminars since January 2001, and his Love, Serve & Succeed business and ethics seminars since 1996. In four years, his wellness radio show on Contact Talk Radio attracted over 100,000 subscribers. He loves to debunk popular myths regarding food quality (critical), vaccines (bad), cholesterol (good), antioxidant vitamins (bad), and chronic illness (preventable). Michael is also a pianist and composer. With his partner, Richard Schmitt, DC, he launched the first online video education service for Standard Process clinicians and their patients, expertnutritionadvisor.com, in September 2014. Useful ideas and resources at michaelgaeta.com and nutritionforacupuncturists.com.
Why I Am Here With You Today
My Purpose & Passion

- To create a world of resilient, vital people who are fulfilled because they make a difference through positive contribution, and stay out of the medical system
- To improve the patient care & practice success of natural health professionals
This is the true joy in life—
that being used for a purpose recognized by yourself as a mighty one. That being a force of nature, instead of a feverish, selfish clod of ailments and grievances complaining that the world will not devote itself to making you happy. I am of the opinion that my life belongs to the whole community and as long as I live it is my privilege to do for it whatever I can. I want to be thoroughly used up when I die. For the harder I work the more I live. I rejoice in life for its own sake. Life is no brief candle for me. It’s sort of a splendid torch which I’ve got to hold up for the moment and I want to make it burn as brightly as possible before handing it off to future generations.

- George Bernard Shaw
**LSS Module Five Seminar Flow**

1. On Success; Vision & Goals  
2. The Four Forces / Creative Process  
3. Phone Skills; Two Phases of Care / First Visit  
4. Cancellation Policy; Report of Findings  
5. Time Management  
6. Practice Statistics; Fees  
7. Walking the Charts; Marketing  
8. Concluding Ideas  
9. Resources & Next Steps

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**Your Action List**

**Goal:** Apply what you learn  

**How:** On a separate sheet of paper, write down specific things you will do on your next office day  

**Best practice:** Write down specific family and patient names, with tests or protocols you will use to help them
Let's Create The Bin

Gaeta Seminars for Health Professionals

On Success
### What Really Matters in Life
From Stephen Covey, PhD, MBA
stephencovey.com

1. The quality of your relationships with people
2. The quality of your character
3. The quality of the contribution you make

### Stephen Covey’s Seven Habits of Highly Effective People

**Self-Mastery:** From Dependence to Independence
1. Be proactive
2. Begin with the end in mind
3. Put first things first

**Relationship Mastery:** From Independence to Interdependence
4. Think win-win
5. Seek first to understand
6. Synergize

**The Upward Spiral:** Self-rejuvenation, continuous improvement
7. Sharpen the saw

*The Eighth Habit: Helping Others Find Their Voice*
Success Factors

The top five factors that American millionaires rate as being very important in explaining their economic success:

1. **Integrity** – being honest with all people
2. **Discipline** – applying self-control
3. **Social Skills** – getting along with people
4. **A Supportive Spouse**
5. **Hard Work** – more than most people

Source: *The Millionaire Mind*
Thomas Stanley, PhD

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Key Business Points

1. **Business is not about money. It's about people.**

2. **Success in business entirely depends on cultivating healthy, positive, loving long-term relationships with people.**

3. **Love is what you are, and the source of all true success.** If you love what you do and those you interact with, you will succeed.

4. **You receive what you give. To give and receive are one in truth.** If you embody the spirit of giving (and do not resist receiving), then all that is right and useful will come to you without strain or struggle.
## The Yin and Yang of Success

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<th>Yin: Inner success</th>
<th>Yang: Outer success</th>
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<tr>
<td>Who you are</td>
<td>What you accomplish</td>
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<td>Private victories</td>
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<td>Your character</td>
<td>Your achievements</td>
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<td>Success in overcoming the small/weak self</td>
<td>Success in the world</td>
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*Covered in more detail in LSS Module One*

## Good to Great

*Wisdom from the classic book by Jim Collins*

1. **Passion:** What you are passionate about that serves the whole; useful service

2. **Excellence:** What you can be the best at

3. **Profit-producing:** What drives your financial engine; what key thing brings in income e.g. PV (patient volume)
### Individual & Collective Transformation

1. The world around only reflects the state of human consciousness.

2. The way to heal the world is for human consciousness to be restored to wholeness, and therefore become a means for creative action.

3. The way to restore human consciousness is to allow one's own consciousness to be transformed, or cleared of self-centeredness and the illusion of separation.

### Ask the Right Questions

*Your Vision & Goals*
Practice Clarity Questions

Envision your ideal practice

1. What kind of practice do I want to have? e.g. in one year

Variants on this question:
- What is my unique way to contribute?
- What is mine to create?

  e.g.
  - What is your ideal office day like?
  - Who are you working with? (patients, colleagues, staff)
  - Ideal location, practice model, solo or group, etc

SMART Goals

Specific: What exactly are you going for?

Measurable: How will you gauge progress, and know if you got there?

Attainable: Aim high, and within your capacity

Responsible: It serves a creative purpose

Timing: A specific “by when” date
### Practice Clarity Questions – 2

#### Write Down Your Patient Flow

2. What is the best way for me to walk with a patient through a long-term process of healing and care?

From the first phone call to first visit to follow-up visits, what do I do and say, and what forms and handouts, are important and useful?

### Practice Clarity Questions – 3

#### How Will I Grow My Practice?

Write down how you plan to:

- Educate existing patients & encourage referrals
- Reach out to and share your ideas with potential patients and those who don’t yet know who you are
The Creative Process

How to Create the Right Things
In a Way That is Consistent
With Your Highest Values

1. Water – Lover – Heart
Surrender, quiet, openness upward, prayer, asking, how would Life/Source/Infinite Spirit have me use this creative power?, listening, be still and know, feel/exp. it already completed/done

2. Air – Magician – Mind
Planning, connection with others, establishing agreement, commitment, what will this look like, get clear, fill out the vision, create definite plans
The Creative Process – 2
How to Create the Right Things in a Congruent Way

3. Earth – Warrior – Body
Tenacity, persistence, perseverance, follow-through, get it done, no matter what, whatever it takes, fueled by burning desire, precision

4. Fire – Sovereign – Heart
Completing, manifesting, celebrate, blessing, declare that it is done and it is good, joy

The Carrot Seed, 1945

The Carrot Seed
Story by Ruth Krauss
Pictures by Crockett Johnson
A little boy planted a carrot seed.

His mother said, “I’m afraid it won’t come up.”
His father said,  
“T’m afraid it won’t come up.”

And his big brother said,  
“It won’t come up.”
Every day the little boy pulled up the weeds around the seed and sprinkled the ground with water.

But nothing came up.
And nothing came up.

Everyone kept saying it wouldn't come up.
But he still pulled up the weeds around it every day and sprinkled the ground with water.

And then, one day,
a carrot came up

just as the little boy had known it would.
Effective Telephone Skills

1. The phone rings.
2. Answer it. "Good (morning), name of office, your name, how can I help you."
3. Ask for caller’s name. Use it frequently.
4. Ask for source of referral to track marketing.
5. "How did you hear about us?" Put on an intake sheet.
6. Offer your help. "How can we help?"
7. Answer all questions clearly. Take your time. Use a phone script. Seek first to understand.
8. Ask for the appointment. "Would you like to make an appointment?"
9. If yes, make appointment & repeat time to them. Take down their phone number. Confirm. Mail or direct to website.
10. If no, ask if they would like information on your office. Take down address & phone. Follow up.
11. "Do you have any other questions?"
12. "Thank you for calling, and have a good day."
### Effective Telephone Flow

**Intake Sheet**

- Space for name, phone, email
- Source of referral
- Reason for calling
- Space for tracking follow-up

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### Common Questions People Ask

Write Down Your Answers On a Phone Script

1. Can you help me with _____?
2. How many times would I need to come in?
3. What are your hours?
4. Do you accept insurance?
5. Directions — how do I get there?
6. How's the parking?
7. What does it cost?
8. How long is each visit?
9. Have you helped others with this concern?
10. How long have you been in practice?
Reminder Calls

- A call made 1-3 days before each appt to confirm time and give them your phone number in case they need to change the appt
- Ask for at least 24 hours notice to change appt (optional)
- Done for every appointment
- Best way to reduce missed appointments

Business Resources for Practitioners
Online Appointment Scheduling

www.fullslate.com

-Patients make and manage (and can pay for) appointments online
- Eliminates up to 80% of phone calls
- Sends automatic reminder emails & recalls
- Patients love it; a must for the modern practice
- Only $30/month
- Mention Gaeta Seminars for a free trial & 10% off

Details for clinicians on other office systems for success in Love, Serve & Succeed Module Five – see order form
## Voice Mail
**Be On Top of It! – Be Precise**

- Have a good OGM — often their first impression of you
- May/not have office hours on OGM
- Keep it short
- Or have a long one and say press * to leave a message
- OK to leave web address on OGM
- Check and return all messages daily (except Sundays), Saturday optional

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### The Two Phases of Your Care
### The Two Phases of Treatment

#### 1. Consultation Phase
- Gives practitioner & patient a chance to decide whether or not to work together
- Practitioner takes the time needed to gather enough information to decide if a therapeutic contract can be successfully entered into and maintained
- Usually takes one visit; can be less or more
- Little obligation on practitioner’s part
- Usually happens on phone
- Ideally happens in the office

#### 2. Treatment Phase
- Practitioner/patient relationship begins
- Therapeutic contract is entered
- Practitioner has obligation not to frivolously discontinue treatment
Your First Visit

With the Client

The First Visit

For a Clinical/Therapeutic Style Office

Often the most important visit you will have with a patient
How any cycle or relationship begins sets the tone for the whole thing

Essential Tasks:

1. Establish rapport
   - Connect with them as a human being, not a disease
   - Make sure they feel accepted, understood and respected
2. Express your confidence that you can help them without promising a particular outcome
3. Explain that your treatments/modalities are safe
4. Agree to work together for an initial series of (weekly) visits
5. Let them know that this illness/situation can be used as a creative opportunity to grow/change/heal/transform
The First Visit - 2

Questions to ask:

1. The Opening:
   • “What brings you here? and/or “How can I help?”

Later: “What do you expect of me?”

2. Questioning / The Intake / Gathering Clinical Data
   • “Is there anything else you wanted to mention or talk about?”

See Nourishing Destiny by Lonny Jarrett for a complete intake.

The Healing Process

1. Healing starts in one place and radiates/spreads from there to other areas in need of healing.
2. Life decides where the healing begins
   • Not you or the patient.
3. If you and the pt can acknowledge positive change happening anywhere/somewhere, you know it will in time spread to other areas.
4. Pin the tail on the treatment
   • “I’m (so) glad the treatment is helping.”
General Guidelines for the Initial Interview
Adapted from Lonny Jarrett, *Nourishing Destiny*

1. Avoid undue or constant focus on chief complaint
   - Most patients have a deeper reason for seeking treatment.
   - Your goal is to promote conscious awareness in people who only seek relief of symptoms.
   - Patients often know what they want, not what they need.
   - Not emphasizing complaints widens the patient’s perspective on the healing process.

2. Deliberately create a peaceful atmosphere of ease and relaxation in the office and treatment room
   - Maintain an attitude of unhurried calm, open-mindedness and alertness to subtle cues.

Basics of Patient Communication

- Explain that you address the cause/root of problem, not just manage symptoms with chemicals or surgery; you do that with natural therapies and natural medicine.
- The healing process is not just about being free of symptoms, but improving well-being & quality of life.
- A condition is considered healed if it no longer hinders your self-expression or quality of life.
- These problems may never completely go away, but they should decrease in frequency and severity, so that you do not focus on it as much.
### Basics of Patient Communication – 2

- Look for improvements in many areas (energy, sleep, relationships, etc.) not just main complaint
- Estimate frequency of visits & overall plan to maintenance phase to sustain improvements and prevent future problems
- Explain what therapies you will use, plus short-, medium- and long-term goals
- Help them make connections between the illness, lifestyle, beliefs and behavior
- Affirm that they can be optimistic about receiving the help they are seeking through treatment

### Basics of Patient Communication – 3

**Theme:** *Use the condition as a creative opportunity to make positive changes*

- See the symptoms not as enemies but as teachers that help you redirect your life in a positive direction
- Symptoms are the body’s way of asking you to pay attention to neglected areas in one’s life
- Find ways to perceive/see the stressful situations differently
- Know that you can choose differently – consciously choose new ways of responding to the challenging situation
- Ask the help you need to do this, counseling, friends, etc.
The New Patient Process

You have:
1. **Big Ears** — ask & listen (s)
2. **Big Eyes** — exam (o)
3. **Big Mouth** — explain dx & tx plan (a & p)

Initial Tx Series

“After these (# of) treatments, if you are satisfied with your progress, we'll continue. If not, we'll stop, and know that we gave it a chance to work.”
Useful Metaphors

Two Good Analogies

Analogy #1

Oil light goes on in the car...
Add oil (treat cause/wholistic treatment)
Or cut the wire that goes to the light
or put black tape over the light
(drugs for symptoms)
Analogy #2

Pebble in the shoe
- Foot hurts
- Doctor gives pill for the pain
- Pain goes away temporarily but pebble is still there
- My approach is to remove the pebble

Another metaphor

Patient with unhealthy lifestyle habits
- “You are walking towards a cliff”
- Will fall off someday unless you change direction
Your Cancellation Policy

1. have one!
2. have it everywhere
   - office info
   - website
   - wall
   - consent form
3. OK to selectively enforce
Cancellation Policy

Appointments must be cancelled 24 hours in advance. If an appointment is cancelled less than 24 hours in advance (and we are unable to fill your appointment time), or the appointment is forgotten (patient does not come or call), there will be no charge the first time. After that, the normal fee will be charged.

Always have a waiting list on full days, so you can call people if someone cancels.
The Report of Findings (ROF)

At the first or second visit, and includes:
- Your assessment
- Your suggested treatment plan, including:
  - frequency of visits, including phases of treatment
  - maintenance
  - initial time frame
  - costs

Based on my assessment, this is what I recommend.

What modalities you will include, why, and how they will help
Safety of your treatments
Their responsibilities
Agreement on the initial course of treatment
Schedule initial series of appointments before they leave
Report of Findings

Key Questions to Answer:
1. What’s going on with me?
   Your assessment
2. How will you help? Your Tx plan
3. How long will it take?
   Number and frequency of visits until re-evaluation
4. What will it cost? Will insurance cover?

ROF cont’d

- Explain that goal is not symptom-free, but long-term wellness care & life quality
- Set re-evaluation date: give them a structure, a digestible time frame not too far out, to reassess and take the next step.
  Change tx plan, protocol, etc.
  e.g. 8-10 weeks, 1-3 times per week
- Include all issues they presented with, on the written ROF
## ROF Form

### Report of Findings & Therapeutic Plan

- **Patient Name**: 
- **Date of Evaluation**: 
- **Practitioner**: 
- **Areas to Address**: 
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- **Assessment**: 
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### ROF Form Cont'd

- **Therapeutic Goals**: 
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- **Suggested Treatment Plan**: 
  - 
  - 
  - 
  - 
  - 
- **Reevaluation Date**: 
- **Financial Agreement**: 

I have read the above and agree to work mutually with 
_________________ (Practitioner) to the best of my ability.

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**Patient Signature**: 
**Date**: 

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Free Online Business Course
With Michael Gaeta, at grasshoppereducation.com

- On patient communication & stages of care
- CEUs/PDAs available for acupuncturists
- Appropriate for all types of practitioners


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Managing Your Time Well
The Three Concentric Circles of Time Management

Give attention to them in this order:

1. Great care and excellence in taking care of existing patients
2. Keeping in touch with potential and past patients
3. Be a strong and positive presence in your community to attract new patients

Time Management Success in a Balanced Way

1. Decide how many hours per week you will devote to your practice
2. Distribute these hours throughout the week  
   - it is preferable to have morning, afternoon and evening hours
3. Consistently spend those hours either treating patients or setting up/growing the practice  
   - be rigorous, disciplined & precise
4. Assume that you will always spend at least ¼ of those office hours doing things other than treating patients
Success by the Numbers

Measuring Progress Well

Why Track Practice Statistics?

“What you measure, you pay attention to.
What you pay attention to thrives.”

- David Lesser, Executive/Business Coach
  executiveconfidant.com
Accounting Basics

**Accounts Receivable:** What comes in
- Monies owed, charged & paid

**Accounts Payable:** What goes out
- Office expenditures

**Patient Management:** What's going on
- Practice statistics

Most are tracked weekly, monthly, quarterly and annually

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Practice Stats
Track Each One Monthly

1. PV: Patient Volume - most imp!
2. NP: New Patients
3. Income per patient visit - affected by fees, sliding scale, product sales
4. Income sources: treatments, product sales, rental income, associates, etc.
5. Avg. monthly income per patient
6. Cancellations & no shows
7. CPP: cost per patient visit
Pay Yourself First

What to do with your income, after expenses:
- 10% to savings then retirement
- 10% to charity
- 10% to investments/assets (paper, real estate, metals, etc.)
- 70% to live on

Complete coverage of financial education
In Module Six

Your Fees
Setting Fees

Factors:
1. Experience/expertise
2. Expenses
3. Demographic
4. Regular resentment
5. How busy you are

Value your time as your most important asset

How to Raise Your Fees

Based on experience, expertise, volume, and feeling in your gut, when the value of your service is worth more than you are charging
Best if done incrementally, e.g. $5-10/time
Put in writing for existing patients
Give existing patients old fee for 1-2 months after fee increases for new pt
Best done when you are busy it relates to supply & demand
Prepayment Discount

- Discount (e.g. 15%) if patient prepays for e.g. 10 visits
- Signed agreement
- If they d/c treatment before they use all visits they pay for treatments used at full fee, and receive a refund of the remaining credit

Senior/student discount?
No — base sliding scale on need, not demographic

Patient Feedback

Patients will often not tell you what’s wrong unless you or your staff ask

How:
1. You ask (opt. outside of an office visit)
2. Staff asks
3. 1-2x/year survey or Qairre (anonymous)
Patient Feedback Questionnaire

1. Simple form plus/delta format, or

2. Survey questions format
   e.g. “rate different aspects of your experience at our clinic on a 1-5 scale
   - cleanliness, punctuality, results, value/cost (good value for your money), billing, staff, etc.”

Growing a Practice

Two Requirements:

1. Attracting new patients
2. Keeping existing patients
Walking the Charts

Two functions:

1. Provides good care & enfoldment
   - caring well for those you have
2. Prevents attrition and "fade away"

Frequency: Once a month or more
Walking the Charts – 2

What you need:
1. Block of uninterrupted time
2. Patient charts
3. Reference books
4. Phone
5. Appointment book

Walking the Charts – 3

Summary of the Steps:
1. Center yourself; calm up
2. Look at patient’s chart last visit
3. See if they have their next appointment
4. Call the patient if appropriate
5. Treatment planning for the next visits
6. Silently bless them
Marketing Your Practice
An Introduction

Marketing

… is letting people know:
1. Who you are
2. What you do — includes:
   How it works & helps
   How it can benefit them
3. Why you do it
Seth Godin on Marketing

Marketing used to be what you say
Now, marketing is what you do. What you make. How you act. The choices you make when you are sure no one is looking.

- Seth’s Blog, 3 September 2014

Yin Aspect of Marketing
Internal Marketing

Includes:
1. The Patient’s Experience
   - Doing a good job
   - Being thorough & on top of things
   - Getting results
2. Patient Education
   - Verbal
   - Print
   - Electronic
3. The Report of Findings (ROF)
Yang Aspect of Marketing
External Marketing

Includes:
- Community
- Internet
- Advertising & Signs

What You MUST Do To Build Your Practice Quickly

1. Results refer to
2. Talk to new people every week
3. Treat patients how you would like to be treated
4. Make it easy for people who appreciate you and what you do to share it with others
Concluding Ideas

Handing Mistakes (yours)

1. Admit it immediately & apologize
   - e.g. I'm sorry. I screwed up. 
   - Do not hide or minimize it
   - Do not defend or justify the wrong action
   - Do not blame someone/something else; own up to it

2. Make it right with them
   - Whatever it takes, to their satisfaction
   - Always take a short-term loss to preserve the relationship

3. Let them know that it will not happen again
The Top Twelve Practice Building Pearls

1. Do an outstanding job. Give more than expected. Have enthusiastic patients.
2. Patient education. Teach your approach & philosophy, value of preventative care.
3. Attractive, friendly, professional office space.
5. Schedule multiple appointments.
6. Strong referral plan; 80% referral practice.

The Top Twelve Practice Building Pearls – 2

7. Strong, clear report of findings & patient communication.
8. Hire excellent staff.
10. Ask for patient feedback.
11. Thorough office procedures & organization.
12. Commit to spiritual mastery. Become a deep, healthy & balanced person.
Ongoing Reading, Seminars & Mentoring

Three Essential Areas:
1. Spiritual Mastery & Evolution
2. Clinical Excellence
3. Business & Finance

Ongoing Mentoring

Essential for safe & responsible practice in any profession
Needed throughout one’s career
Most important when starting out

Who:
A senior practitioner in your field
Someone to discuss a difficult case or situation with
Someone to whom you refer a case that you can’t yet handle – know your limitations!
Next Steps

- Commit to mastery & service
- Find a mentor and/or spiritual fellowship
- Daily practice: inspirational reading/audio, meditation, wellness practices, stay present
- Individual practice coaching with Michael
- What three specific steps will I take next - set a time frame
- Pair off for voluntary support & accountability
Love, Serve and Succeed® Module Five: Systems for Success
Michael C Gaeta, DAc, MS, CDN, LMT

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Module Five: Growing a Thriving Practice
Systems for Success
How to Run and Expand Your Clinic
Outstanding Patient Care for Superb Clinical and Business Results

Module Six: Building and Preserving Wealth
The Financial Secrets of the Wealthy; Becoming Financially Savvy

Module Seven: Integrity in the Healing Relationship
Ethics and Self-Development for Health Professionals

Gaeta Seminars for Health Professionals

Resources & Next Steps

seleneriverpress.com – see Historical Archives
Also for teachings of Royal Lee, Back to School series, etc.
Next Steps: Further Professional Trainings to Improve Your Patient Care & Practice Success
Complete Details in Your Notes

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<td>- Online video education for SP clinicians &amp; patients</td>
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<tr>
<td>- Register for free training program (normally $597) here:</td>
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<tr>
<td><a href="http://www.expertnutritionadvisor.com/glenn-kikel">www.expertnutritionadvisor.com/glenn-kikel</a></td>
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</tbody>
</table>

Free Resources and Ways to Connect And Share with Gaeta Communications

- Subscribe to GaetaCommunications on YouTube
- Follow us on Twitter - MichaelCGaeta
- Subscribe to & Like Gaeta Communications on Facebook
- Join 100,000 subscribers to the Radio Show & E-list through the GaetaCommunications.com homepage
  - listen to the entire radio show archive for free
  - read & share to Michael’s Be the Change blog
- Connect on LinkedIn: linkedin.com/in/mgaeta
But Wait, There’s More!

Please read the Appendices section after the Thank You slide, for more useful clinical and practice-related ideas, and additional resources to expand your nutritional practice. Enjoy!
Only to the degree that one is open can one receive and be a channel for healing. This healing manifestation is accomplished because one has allowed him or herself to be an opened window through whom the healing radiance has gone forth to all suffering humanity. To seek to get healing is futile. To let the healing radiance pour forth through you in blessing to others is the perfect way.

Uranda

Healing Radiations,
1 November 1937
Appendices

Free Online Business Course
With Michael Gaeta, at grasshoppereducation.com

- On patient communication & stages of care
- CEUs/PDAs available for acupuncturists
- Appropriate for all types of practitioners

Gaeta Seminars for Health Professionals

**Business Resources for Practitioners**

Legal Entities & Intellectual Property Assistance

www.mycorporation.com

- LLCs, corporations, trademarks, DBAs, copyrights, business licenses, etc.
- Free small business learning center
- $10 discount code: legal10

Details for clinicians on the legal issues of practice in Love, Serve & Succeed Module Three - see order form

---

The Four Agreements
By Don Miguel Ruiz

1. Be Impeccable With Your Word
2. Don't Take Anything Personally
3. Don't Make Assumptions
4. Always Do Your Best

The Fifth Agreement:
Be skeptical but learn to listen
# Ghandi’s Seven Blunders of the World

<table>
<thead>
<tr>
<th>Wealth without work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pleasure without conscience</td>
</tr>
<tr>
<td>Knowledge without character</td>
</tr>
<tr>
<td>Commerce without morality</td>
</tr>
<tr>
<td>Science without humanity</td>
</tr>
<tr>
<td>Worship without sacrifice</td>
</tr>
<tr>
<td>Politics without principle</td>
</tr>
</tbody>
</table>

## Core Values Process

1. Seven things most important to you in life, in order of priority (compare to each other)
   - what drives you, gets you up early
   - what you would go the extra mile for
2. What is imp't to you about it (few words)?
3. How do/would you know if you have it?
   - measurable
Seven Core Purposes of Healthcare
David Kailin, PhD, LAc, MPH

1. Ecological: biosystemic balance
2. Societal: good of the body politic
3. Spiritual: quest for meaning
4. Moral: attending to suffering
5. Augmentative: enhancing capacities
6. Corporeal: bodily treatment
7. Economic: fair exchange

Source: Quality in Complementary & Alternative Medicine, D. Kailin, CMS Press

Success

To laugh often and much;
To win the respect of intelligent people
and affection of children;
To earn the appreciation of honest critics
and endure the betrayal of false friends;
To appreciate beauty; To find the best in others;
To leave the world a bit better, whether by a healthy
child, a garden patch or a redeemed social condition;
To know even one life has breathed easier because
you have lived; This is to have succeeded.

Bessie Stanley
Often attributed to Ralph Waldo Emerson
The Sliding Scale

A reduced fee based on what the patient can afford

It is based in two ethical principles:

1. You do not turn people away because of money

2. You provide the same high quality of care to every patient, regardless of how much you are paid
More on sliding scale

Almost all the time they can afford a fee in the range you give

Rarely they won’t and you then as what they can afford for that tx freq.

The Sliding Scale
How To Do It Right

1. Do not advertise that you have a sliding scale
2. Let the patient tell you they cannot afford your fees
3. Explain that you do not turn people away who are committed to their healing because of money. Money is not a reason to not receive treatment
4. Start with an agreed-upon frequency of visits; then give them a range of fees that works for you and let them decide what they can afford in that range
5. Have a signed written agreement that links the reduced fee to a specific frequency of visits
## Sliding Scale Fee Agreement

Due to financial concerns, I, (patient name) __________________ understand that the Hands-On Health Wholistic Healthcare Center is extending me a reduced sliding scale fee from the normal fee of $______ per visit. The amount agreed upon for my visits will be $_______. This reduced fee is based on my coming in __________ for treatment. It will remain the same as long as I maintain that frequency of visits, or until my financial situation improves. If I come in less frequently, the fee for my visit will increase accordingly. (For example, a reduced weekly fee of $60 will increase to the normal $85 if I come in after two weeks.)

I understand that the Hands-On Health Center will periodically ask me to re-evaluate my financial status. As it improves, I will adjust the sliding scale fee accordingly.

## Schedule Multiple Appointments!

1. Assessment/intake
2. Create a tx plan, e.g. 10 weekly visits, then re-evaluate
3. Schedule those appts in advance e.g. at that visit
4. Best time to offer prepayment discount, e.g. 15%
## Discontinuing Treatment
(Or, Discharging a Patient)

1. **In writing** (preferably certified mail, return receipt requested)

2. **State reasons**
   - e.g. non-compliance/not following treatment plan
   - inappropriate behavior
   - failure to pay
   - chronic no-show/late

3. **Be available** to treat them for 14-30 d.

4. Prevents claim of abandonment

### Charting - Overview

**Guidelines for Charting**

*Based on recommendations from the American Acupuncture Council*

- A patient’s chart is a medical and legal document.
- In the event of a lawsuit, the general rule is *if it’s not in the chart, it didn’t happen.*
- A patient’s chart can be your best defense in litigation, and it can be your greatest liability, since it is one of the primary parts of evidence.
- Write in a chart assuming that someone else may read it later, e.g. an attorney or insurance company.
- What follows are practical suggestions gathered from practitioners, insurers and attorneys
### Charting Specifics

- Maintain records in ink, and use the same pen for each entry on the same day. Change pens from time to time, so that you do not use the same pen for all notes in the chart.

- Do not alter records (e.g. erasing, using correction fluid or adhesive labels). The most potentially damaging mistake you can make in a patient’s chart is to make alterations in an entry. This gives the impression that you made changes later (e.g. after the suit was filed) to hide something or present it in a different way.

- Fill in all blank space; do not skip lines or leave spaces. Draw a line through large blocks of space. Do not squeeze in notes or indent. Write in a chart assuming that someone else (e.g. insurance or attorney or other practitioner) will read it.

### Charting Specifics - 2

- Make additions and changes appropriately. Initial changes/corrections and label them “error”.

- Notate all patient contact, including phone calls. Among other things, this can help counter a claim of abandonment.

- Avoid using disparaging or judgmental remarks (e.g. “he’s crazy”) and frivolous words. Do not criticize other practitioners in the chart (or verbally to the patient).

- Initial or sign all entries. If someone other than you makes a notation, they should also sign or initial it.
Charting Specifics – 3

- Write legible, clear, concise and complete entries.
- Document patient non-compliance and unusual events. Avoid contradictions.
- Do not use computer-generated notes or pre-printed forms unless they are personalized and customized for your practice.
- Review and archive files regularly, e.g. once per month. Retain records forever. e.g. NY requires retaining records for 7 yrs.
- Keep financial and clinical information separate, e.g. do not write the patient’s balance or credit card information in the chart.
- Do not release copies of the patient’s chart (never the original) without a signed and current Release of Records Authorization.

The SOAP Format for Charting

- The standard format for progress/visit notes.
- Originated in the nursing profession

Four Parts:

Subjective: What the patient said. "Quote them when possible.

Objective: Your findings, e.g. observation, pulse, tongue, etc.

Assessment: Use Chinese medicine terminology, not Western Dx;
- Include here your treatment (what you did in that visit);

Plan: What you plan to do in future visits
- Also chart what changes the patient reported after treatment.
- Quote the patient in their own words, when possible.
### SOAP Charting – Sample

<table>
<thead>
<tr>
<th>PT: Darlene Murphy</th>
<th>Date: May 6, 2005</th>
<th>Acu, Amma</th>
<th>Tx 12</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>I'm pooped. Not sleeping well. Can fall asleep fine, can't stay asleep. c/o occipital HA upon rising. Slept well after the last Tx.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>O</td>
<td>Dull pale face. Voice groaning &amp; weak. Dark circles under eyes. Pulse - thin, deep wiry KI &amp; VF, reg. irreg. w/ breathing. Tongue - pale, red tip, midline crack to LU, a bit puffy. Abd - Lower abd. (KI) empty, tender CV12, 17 &amp; around navel.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>KI Yin def., B def., KI CF, some HT heat. Tx - Amma head, neck, Ŷ chest &amp; sternum. Acu Rx CV 12, 4, KI 7, 23, LU 5, YT.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>Back Tx - BL 14, 23, etc., Tian Wang Bu Xin Dan, meditate before bed. PT asleep after n. set; more calm &amp; alert after Tx; I feel great. Eyes brighter.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

MCG

### How to Set Up a Patient Chart

**Recommended Format:** 4 or 6-panel classification folder with 2 holes at top, e.g. Staples Item# 443479 (6-panel, recycled) 800 333 3330

**Sample Four-Panel System:**

- **Panel 1:** Questionnaire, consent form, advisement form, medical records, food diary, insurance forms, etc.
- **Panel 2:** Progress/visit notes
- **Panel 3:** Copies of recommendation pad notes, handout list
- **Panel 4:** Other recommendations, herbal Rx
Requirements & Good Practices

- Follow universal precautions
- Fire prevention & emergency action plan
- Post OSHA Job Safety & Health Poster
- Keep complete & legible patient records - SOAP format
- Maintain patient confidentiality
- Only release records with written consent
- Retain records forever, or for time required by your state
- Inform patient about Tx, fees, policies
- Signed consent form for each patient & modality
- Do not go beyond your limitations
- Refer to other practitioners & physician PRN

Requirements & Good Practices - 2

- Limit medical discussions to OM
- Keep first aid kit & gloves in office
- Keep first aid/CPR certification current
- Call 911 for medical emergencies
- Use extra care with moxa, cupping, guasha
- Minimize use of direct moxa
- Wear gloves for cupping & guasha
- Disinfect cups after use
- Use disposable guasha tool
- Do not date patients
- Use an employee manual if you hire
- ABC: Airway, Breathing, Circulation
  - 15 compressions, 2 breaths, repeat
  - Only do CPR if no pulse (ideally)
**Insurance Billing**

**Items to Include on a Bill:**
- Patient name & insurance ID #
- ICD-9 diagnosis code & description
- CPT procedure code & description
- Date(s) of service
- Charge for each service
- Your name, license #, address & signature

Signed release form is needed if copies of patient records are asked for.

---

**Recommended Films**

*For Personal Responsibility and Action*

- The Story of Stuff  storyofstuff.com
- The One Minute Shift Series  oneminuteshift.com
- The Last Lecture  thelastlecture.com
- Store Wars  storewars.org
- What the Bleep Do You Know?  Whatthebleep.com
- The World According to Monsanto
- King Corn  Chow Down
Online CEU Webinars
With Michael Gaeta

In conjunction with Northwestern Health Sciences University
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Each one is 2 hours, 2 CEUs for DC or LMT, $60

1. Cancer Support & Prevention
2. A Wholistic Approach to Improving Cardiovascular Health
3. Healing the Center: Gastrointestinal Health
4. Ten Essential Botanicals for Clinical Practice

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With Michael Gaeta, DAc, MS, CDN

ARTICLES & RESOURCES

gaetaseminars.com
THE YIN AND YANG OF PRACTICE BUILDING

By Michael Gaeta, DAc, MS, CDN

"Let all your things have their places; let each part of your business have its time."

-- Benjamin Franklin

Practitioners of Asian medicine are familiar with the concept of Yin and Yang—the fundamental concept on which the medicine is based. Yang and Yin are the two poles of life—heaven and earth, light and darkness, invisible and visible. The blending of these forces gives rise to all that is manifest (Qi). Yin and Yang are differentiations of the One, and the parents of all creation. Let us explore how it applies to building and sustaining a successful healthcare practice.

The Yang aspect of practice management can be described as dynamic energy. It is the active, “go out there and make it happen” energy which fuels the passion and enthusiasm necessary for any successful venture. Nearly all practice management and success seminars focus almost entirely on this area. Steven Covey, in his book Seven Habits of Highly Effective People, refers to this as the realm of technique—specific sales, marketing and “relationship building” methods for business success. Countless books have been written on this subject. A few of them are excellent; they detail the nuts of bolts of how to “put yourself out there” in an intelligent and effective way. Related to a healthcare practice, these are excellent expressions of the Yang aspect of practice management. They include public speaking, writing articles, promotional literature, print advertising, direct mail, health fairs and expos, and networking. These external methods and techniques are useful parts of a successful approach to growing a strong practice.

The Yin aspect of practice management can be thought of as magnetic energy. As Steven Covey points out in Seven Habits, technique without authentic presence is shallow and superficial, and leads to a flash-in-the-pan business. Three of his seven habits (think win-win, seek first to understand, synergize) are technique-based, and three are “character habits” (be proactive, begin with the end in mind, put first things first) that cultivate integrity and personal power. Since Yin is magnetic, receptive energy, it would be useful to look at how magnets work.

A magnet does not reach out and grab metallic objects to itself. It draws to itself that which is responsive to its particular creative field. There is a perfect and specific design to that what is attracted to a magnet. A mass of iron filings—the most malleable and responsive of all substances drawn to a magnet—arrange themselves in a beautiful geometric pattern. This occurs without any conscious effort on the part of the magnet. The magnet does not advertise, “Iron filings wanted,” or say to the filings, “You move over there. You move over here.” It does not network with groups of different metals in order to cultivate relationships with iron. It simply is itself, naturally expressing its true nature. Then, without effort or struggle, all that resonates with the magnet—all that rightly belongs in close proximity to it—is drawn to it.
All people will come to him who keeps to the One,  
For there lie rest and happiness and peace.”  

-- Lao Tzu: Dao De Jing, Chapter Thirty-Five

So it is in life, and in a healthcare practice. As a practitioner grows, matures, and becomes more in touch with and expressive of his or her true nature, all the patients that could receive help from them are naturally drawn close. And those who are for the moment unresponsive—unable to receive that which the practitioner offers—are naturally repelled, like two magnets of the same polarity. Even more, it is Life, not the practitioner or their marketing consultant, that beautifully orchestrates this, according to Life’s perfect design.

“One can have no greater mastery than mastery of oneself.”  

-- Leonardo DaVinci

The practical “how” of cultivating magnetic Yin energy relates to daily spiritual practice. It is essential for a healthcare practitioner to have a daily spiritual practice. It is not for the author or anyone else to say what that should look like, but it is for each individual to seek and find what works for them. It can be part of a religious context, or outside of a religious context. The important thing is to find a spiritual path or practice which most deeply resonates with the highest truth you know. Elements of spiritual practice common to most traditions include meditation, prayer, journaling, inspirational reading, and joining with like-minded people regularly. For practitioners interested in working with people at a level deeper than taking symptoms away with a technique, this is fundamental. A practitioner can only reach someone to the depth they have gone in themselves. If you want to do deep work, be deep. The deepening process is what is referred to here as daily spiritual practice.

“Character may be manifested in the great moments, but it is made in the small ones.”  

-- Phillip Brooks

People come to you not because of what you do, but because of who you are. This is a generalization, because some people will call and come in after seeing your ad, flyer or business card. But what will inspire them to come more than once or twice is your presence, and the connection they feel with you, which is the basis of the therapeutic relationship. Become someone people want to be in the presence of. It is not something which can be manufactured or put on. It is being true to the highest truth you know in each moment. As you continue to refine your expression—your thoughts, words and actions—to more accurately reveal the truth of who you are at your core—your true nature—then your work will deepen, your practice will thrive, and your life will know greater peace and fulfillment.

“A business that makes nothing but money is a poor kind of business.”  

-- Henry Ford
Business is not about business, in the usual sense of money and profit. It’s about people. Success in business entirely depends on cultivating healthy, positive, loving long-term relationships with people. Building and sustaining a successful practice combines the Yang, dynamic energy of outer action, with the Yin, or magnetic energy of inner development.

"Try not to become a man of success, but rather try to become a man of value."

-- Albert Einstein

About the Author

Dr Michael Gaeta is a visionary educator, clinician and writer in the field of natural healthcare. His purpose is to create a world of vital, resilient people who find fulfillment through positive contribution. Michael works with natural health professionals who want to improve their patient care and practice success, through his clinician’s mentoring program, live seminars and webinars, and distance learning programs. He holds licenses in acupuncture, dietetics-nutrition and massage therapy, and is a doctor of acupuncture in Rhode Island. Michael earned his master’s degree in acupuncture from the New York College of Health Professions, where he was a faculty member for ten years. Michael’s teaching is informed by 23 years of successful clinical practice, in his New York and Colorado clinics, helping thousands of patients improve their well-being, prevent illness, and stay out of the medical system. He co-founded Acupuncture for Veterans, providing free treatments in New York City. Michael is past president of the Acupuncture Society of New York, earning awards for State Association President of the Year. He appeared on the CBS Early Show and NBC News, and has trained thousands of clinicians in his Success with Natural Medicine clinical seminars since January 2001, and his Love, Serve & Succeed business and ethics seminars since 1996. In four years, his wellness radio show on Contact Talk Radio has attracted over 100,000 subscribers. He loves to debunk popular myths regarding food quality (critical), vaccines (bad), cholesterol (good), antioxidants (bad), and chronic illness (preventable). Michael is also a pianist and composer. Useful ideas and resources at michaelgaeta.com and nutritionforacupuncturists.com.
THE CONSULTATION

By Michael Gaeta, DAc, MS, CDN, Dipl Ac & ABT (NCCAOM)

A free consultation is a wonderful way to connect with a potential patient, and market your practice in a professional and ethical way. In-office or phone consultations demonstrating qualities of caring, patience and understanding make you a practitioner who attracts clients who resonate with your purpose and approach, instead of one just working to lure them in.

Free consults are frequently used by professionals in various fields to make it safe for people to contact them at no risk, no cost and no obligation. It invites people to make an initial contact. Consults are a tasteful thing to offer in your marketing materials and website. Your conversion rate from initial inquiry to appointment is higher with successful free consultations. They help you become a practitioner who is a magnet, who attracts people who are a good fit for your practice. Since consultations often happen by phone, developing strong phone presence is important.

A consultation is not an evaluation. It is perhaps 15 minutes spent with a person to assess their needs, goals and concerns, and explain if and how you can help. It is designed for those who are unsure if your approach is the right one for them. The potential client is at no risk and invests nothing but time. Block off fifteen minutes in the schedule for your free consultations, and see if that is a good amount of time for you. Inform the prospective client of your time frame. Don’t rush, and set aside enough time, because in terms of a complete course of long-term care, this could be a conversation worth several thousand dollars.

Here are some specifics that make for a good consult:

1. Start by asking an open-ended question like, “What brings you here?” or “How can I help?” This is also a good opening question for your initial evaluations.
2. Listen attentively and patiently, but use clarifying or redirecting questions to keep the consultation from going too long.
3. Explain your approach to patient care—how it works, and how it will benefit the client and her specific condition. Be sure to start with your “Why” – your purpose or reason for working with people as a health professional. Knowing and communicating why you do this work is one of the most powerful invitations to those who might resonate with you and your practice.
4. Estimate the cost of treatments and supplements. Speak with confidence and clarity.
5. Give an overview of the frequency of treatments – more frequent visits at first, tapering off to maintenance/wellness/preventative care as they improve.

6. Ask if the prospective patient has any questions about your approach.

7. Ask if she would like to make an appointment. Whether or not an appointment is made, be sure to provide educational literature about your practice, and nutrition. The Standard Process brochures “Are You Feeding Your Body,” and the DVD “Why You Need Whole Food Supplements” (available at no charge from SP), are great pieces to give to a potential or new patient. Thank the person for her time. If she is not ready to make an appointment, tell her that you will be glad to help when she is ready.

Then ask if the prospective client has any further questions. Repeat this question until all of their concerns are addressed, then ask if they would like to make an appointment (very important!).

During free consultations, you don’t need to take notes, do a physical exam, or conduct a detailed history or assessment. Save all of that for your initial evaluation. Keep the tone of the consult relaxed, and have an intention to be fully present, ask good questions, and listen well. The prospective patient is carefully sizing you up in a free consult, with the perspective that how you treat them in this initial exploratory visit is how you will treat them if they become your patient. If they feel cared for, respected, heard, accepted and understood, then you did a great job!

From the perspective of medical ethics, a free consultation is also an opportunity for you to ask yourself, “Is this person is a good fit for me, someone I can help, someone that I can enter into a successful therapeutic relationship with?” “Can I actually help this person, within my scope of experience, training and expertise?” Knowing our limitations as practitioners and not taking on cases that are beyond our abilities is essential to ethical practice.

In a free consultation, since you have not yet taken them on as a patient, you also have no obligation to begin working with them, and can decide not to do so for any reason. As one chiropractic professor said, “I don’t just want new patients. I want good patients.” In other words, people who resonate with your care, and are willing to actively participate and take responsibility for their own healing process.

One day, in my first year of practice 23 years ago, a new patient came in seeking a natural treatment for her colon cancer. I clearly explained that I do not treat cancer, but rather provide natural therapies and nutritional support to patients with and without cancer, to promote healing and repair, by supporting their own innate healing ability. I also referred her back to
her oncologist to discuss treatment options, and explained that the care I provide can work alongside conventional treatments that she might choose. Appropriate referral is a key to safe and ethical practice.

Consultations are a low-risk way to help you and the potential client decide if you are a good fit for each other, if their condition is within your skill set, and sets a strong foundation for a successful long-term therapeutic relationship. Start sharing this opportunity to connect with you in your community, and watch your practice grow!

About the Author
Dr Michael Gaeta is a visionary educator, clinician and writer in the field of natural healthcare. His purpose is to create a world of vital, resilient people who find fulfillment through positive contribution. Michael works with natural health professionals who want to improve their patient care and practice success, through his clinician’s mentoring program, live seminars and webinars, and distance learning programs. He holds licenses in acupuncture, dietetics-nutrition and massage therapy, and is a doctor of acupuncture in Rhode Island. Michael earned his master’s degree in acupuncture from the New York College of Health Professions, where he was a faculty member for ten years. Michael’s teaching is informed by 23 years of successful clinical practice, in his New York and Colorado clinics, helping thousands of patients improve their well-being, prevent illness, and stay out of the medical system. He co-founded Acupuncture for Veterans, providing free treatments in New York City. Michael is past president of the Acupuncture Society of New York, earning awards for State Association President of the Year. He appeared on the CBS Early Show and NBC News, and has trained thousands of clinicians in his Success with Natural Medicine clinical seminars since January 2001, and his Love, Serve & Succeed business and ethics seminars since 1996. In four years, his wellness radio show on Contact Talk Radio has attracted over 100,000 subscribers. He loves to debunk popular myths regarding food quality (critical), vaccines (bad), cholesterol (good), antioxidants (bad), and chronic illness (preventable). Michael is also a pianist and composer. Useful ideas and resources at michaelgaeta.com and nutritionforacupuncturists.com.
A version of this article appeared in Acupuncture Today.

As you develop your acupuncture practice—on your own or with others—you will need to know how to get the word out about you and your Chinese medical therapies. There are three main ways of marketing your practice: external, internal and community. Understanding what they are and how they work is of great importance to your practice.

To begin, we must understand that each of these areas of marketing should be a separate but important part of your overall practice-building strategy. Acupuncturists who rely on only one area will find that they have a difficult time getting a practice started quickly.

Next, we need to know that at different stages in the development of an AOM practice, there are different ways to successfully market that practice. A clinician who opens up a new practice, and only relies on referrals for gaining new patients, will find that the process is slow-going, and often takes years. Not many people know you are there, and there is no way for them to find out about you, except through those who already know you. On the other hand, a practitioner who has a strong and steady practice, with a large number of referrals, is not well served by spending a lot of money on print advertising. They would, however, benefit through the patient retention practices of internal marketing and strong customer service.

Here is a brief overview of each of the three types of marketing. The first and most obvious is the external marketing approach. This is how you let a large number of new people know who you are and what you do. External marketing is the most expensive of the three forms of marketing, so it is important that you have a strong understanding of how this type of advertising works. Otherwise, you could invest a significant amount of money and not be in a position to get the most back from your investment. Knowing how to use this type of marketing effectively—from the start of your practice to the time when it is strong and vibrant—will help you make the most of your investment.

This approach centers on the many types of advertising you often see—newspaper ads, flyers, posters, press releases, e-mail campaigns and similar mass-marketing efforts. The external approach is directed at people who do not know about your practice and what you can do to help them.

External marketing is a time-tested way to connect with new patients. To utilize it effectively, you must understand that this type of advertising works in a particular way. It has to stand out visually in the location that you place it, while conveying a sense that your business is trustworthy and professional. It must also connect with the needs of the patient in a way that helps them to recognize that you might be able to help them meet that need.

This type of advertising works over time. Many practitioners, not understanding this, make common mistakes. Some run ads only once, and become disappointed when the phone does not ring off the hook. Others run an ad for 4-6 weeks, and see nothing that really improved their practice. Either they did not track their marketing efforts by asking all new callers how they
found out about their practice, or they did no occasional follow-up ads to continue the momentum of the initial run. They did not understand that external marketing works on people slowly. An advertisement needs to be seen several times for it to connect, and at that time people may not need your services. But through consistent effort, awareness of your presence in the community is built, so when they do need you, there is a greater chance they will choose your practice to call.

The second method of connecting with patients is internal marketing. There are three important reasons for doing this type of marketing. One is to educate existing patients on the benefits of the therapies available through your practice, and to introduce new therapies you develop or add to the practice. Two, this approach helps you stay connected to your patients in a gentle way. This helps keep you in mind if they decide to use your type of services again after a break in treatment. Three, you educate your patients as to the benefits of acupuncture therapy and how it is helping them, which inspires them to continue care with you. They realize the benefit you give them, and can communicate what you are capable of to their families and friends. This works to create a natural referral network.

Internal marketing is necessary if you are going to get your acupuncture practice to a stable consistent level of business. Things like a monthly newsletter (print and/or e-mail), patient surveys, thank you cards and gift certificate programs, are all ways to create and maintain a strong relationships with existing patients. This type of marketing takes less money, but requires strong attention to details in the daily running of your practice.

The third method of connecting with new and old patients alike is community marketing. This approach consists of being active within your local community. Many times you can gain new patients and get into corporate settings by being involved with local civic and business groups. This approach combines the education aspect of internal marketing with print marketing tools to get the word out that you are there and can help with many health concerns and wellness care. This approach takes the most time and energy, but can be highly effective in both the startup practice and the well-established one.

These three areas are essential parts of your practice building and patient retention systems. Use them well—on a strong foundation of spiritual practice and character development—and your practice will thrive.

About the Authors

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Have Fun Building Your Practice

By Linda Smith Cohen

For many years I have had the privilege of spending time with many practitioners of all modalities. From our discussions and mutual experiences the following is a list of the key actions that have proven to create a well-rounded effort in increasing the number of patients in their practice.

• You have a brochure and business cards printed and therefore people feel you are serious about your specialty.

• You have a web site and you put your web address on your brochure, business cards, and always remind your patients or clients where they can find your site on the World Wide Web. This is especially good for referrals and word-of-mouth.

• You post flyers or leave handouts about your speaking engagements, workshops, seminars, or trainings at bookstores, health food stores, vitamin shops, or video stores.

• You have become a part of an Integrated Center where you provide one of the specialties and receive referrals from the other practitioners there.

• You get a booth alone or shared at relative health fairs where you can interact with the public, answer their questions, provide a service, and promote yourself and your practice.

• You volunteer to speak or give a presentation in front of any audience that makes sense.

• You ask other practitioners to put your literature in their offices; you do the same for them.

• You attend networking meetings, such as Chamber of Commerce, Rotary Clubs, EarthMed.com and health-related organizations, and talk to people about what you do. If you want to belong, join. If not, pay as you go.

• You look for Public Relations (PR) opportunities by sending a press release to radio and TV stations, newspapers, and more. Watch the health news and call the stations when they may need commentary on a subject in the news.

• You advertise where your targeted market will see or hear your ads.

• You make sure to have a good picture of yourself on hand for all of the above.

• You write passionate educational articles on your specialty and submit them to relevant newspapers, magazines, websites etc.

• You encourage testimonial letters from your clients or patients and post them in your office and on your web site.

• In the words of Patch Adams, M.D., “Patients Beware, Laughter is Contagious.” Norman Cousins was a renowned author and speaker who laughed himself well after a terminal diagnosis. His story is an inspiration to all of us. Humor is healing. Find ways to include humor in your practice.

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