Module Four:

Effective Marketing on a Shoestring

What Works and Doesn’t Cost a Lot

July 2013 Edition
LOVE, SERVE & SUCCEED®: CONNECTING SPIRIT TO SUCCESS FOR HEALTH PROFESSIONALS

MODULE FOUR: EFFECTIVE MARKETING ON A SHOESTRING

What Works and Doesn’t Cost a Lot

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

Seminar Description
Health professionals need emotional and spiritual maturity, clinical expertise, and business skills. Success in practice is the result of building healthy, positive, long-term relationships with people. It turns out that some of the most effective ways to grow a practice don’t cost much. With the right spirit, approach and language, a clinician can attract many new patients by investing time and little money in high-return activities that are fun to do. Come to this innovative and inspiring seminar to gain a solid education in effective, low-cost marketing. Learn the essentials of effective and ethical business success based on character, integrity and spiritual practice. Topics include the top five success factors, the Yin and Yang of marketing, effective patient education and public presentations, and the five best ways to attract new patients. You will emerge from this seminar with the confidence, skills and actionable next steps needed to start or grow a thriving private practice.

Seminar Goals & Objectives
By completing this program, the participant will be able to:
1. Learn what marketing is and is not
2. Understand the Yin and Yang of Internal and External Marketing
3. Gain a perspective on how to effectively grow one’s practice at little cost
4. Learn the top five ways to attract new patients
5. Appreciate the importance and how-to of community and internet marketing

Appropriate audience: all students and health professionals in private practice.

Participant Comments on this Seminar
“Modules Four was very practical and informative. I will definitely attempt to implement several of the suggestions outlined in these modules.” - Jonathan G.
“I loved The Bin (topics we had questions about), and liked your materials and presentation (i.e. slides). Loved emphasis on doing good by doing well. It helps me overcome my distaste for self-promotion.” - Ann Knowles, ABT

“Module Four gave valuable information on "Marketing on a Shoestring", with a plethora of ideas which can keep you busy for a decade and will fill your practice to the hilt, if you follow them.”- Kate Hoffmann AP, in a review of Michael’s two-day seminar for the Florida State Oriental Medical Association newsletter

About the Presenter
Dr Michael Gaeta is a visionary educator, clinician and writer in the field of natural healthcare. He offers trainings, patient care and learning programs to create a world of resilient, vital people who make a difference through positive contribution. He holds licenses in acupuncture, dietetics-nutrition and massage therapy, and is a doctor of acupuncture in Rhode Island. Michael earned two degrees in bodywork therapy and a Master’s degree in acupuncture from the New York College of Health Professions, where he was a faculty member for ten years. He holds diplomates in Acupuncture and Asian Bodywork Therapy from the National Commission for the Certification of Acupuncture and Oriental Medicine. Michael is a Certified Instructor of the American Association for Bodywork Therapies of Asia, former editor of its Pulse newsletter, and past New York State representative. Michael’s teaching is informed by 23 years of successful clinical practice, in his New York and Colorado clinics, to help people heal, grow and prevent illness. He is co-founder of Acupuncture for Veterans, providing free treatments in New York City to US veterans. Michael is past president of the Acupuncture Society of New York, earning awards for State Association President of the Year and State Association of the Year. He has appeared on the CBS Early Show and NBC News, and presents seminars nationally on clinical nutrition, herbal therapy, business success and medical ethics. He has trained thousands of clinicians in his Success with Natural Medicine clinical seminars since January 2001, and his Love, Serve & Succeed business seminars since 1996. In three years his wellness radio show on Contact Talk Radio has attracted over 100,000 subscribers. Michael is also a pianist and composer. His passion is to give, love and serve through teaching, hands-on therapies and writing.
Why I Am Here Today with You My Purpose & Passion

- To create a world of resilient, vital people who are fulfilled because they make a difference through positive contribution/service
- To improve patient care & practice success
- To keep people out of the medical system
Module Four: Marketing
What Works and Doesn’t Cost a Lot
June 2013 Edition

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Self-Cultivation and Healing
From Lonny Jarrett, *Nourishing Destiny*

“...practitioners of the inner tradition cannot make things happen in their patients. Rather, they create the appropriate context for change through each nuance of interaction with the patient. The practitioner’s own internal alignment, called forth in performing the ritual of treatment, creates a context for healing even before the needles are inserted or the herbs are prescribed. Ideally, the patient’s transformation is initiated by the very presence of the practitioner. This approach deemphasizes the technical aspects of acupuncture or herbalism and places the responsibility for successful treatment directly on the spiritual development and cultivation of virtue by the practitioner.”

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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 in the next week

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Key Points

1. It is essential for a health professional to have a daily spiritual practice.

2. You can only reach someone to the depth you have gone in yourself.

3. People may come to you because of what you do, but will stay because of who you are.

Practice Pearl

You can only serve or help someone on the basis of their response, not their need.
Marketing

... is letting people know:
1. Who you are
2. What you do
3. Why you do it
4. How it works & helps
5. How it can benefit them

The Yin and Yang of Marketing

1. Yin – Internal
   ● Centers on patient education
   ● All patients should be able to describe what you do, how it works & helps, all the things you can help with

2. Yang – External
   Includes:
   ● PR
   ● Community
   ● Internet
   ● Advertising
The Yin and Yang of Marketing

Yin/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)
The Yin Aspect of Marketing

Patient Experience

1. The Patient Experience
What Patients Say is Important to Them

*Key:* Always look at your clinic
*from the patient’s perspective*

- Your listening
- Your not being rushed
  - A sense of ease with time
- Your asking them questions
- Your punctuality (impt. for some)
- Your full attention – being fully present
The Yin Aspect of Marketing

Patient Education

Educating your patients through:

1. Verbal explanation – you and your staff
2. Office literature – pre-made or your own
3. Patient newsletter – at least quarterly
4. E-mail news & updates – at most monthly
5. Website
6. Treatment anniversary, birthday cards, gifts
Patient Communication Scripts

What to say, how to say it, when to say it, in the best way

Think of the types of things you say to patients frequently and how to say it best – write it down

Use for speaking on the phone, staff training, etc.

Yin Aspect of Marketing

Creating Office Literature

- DIY – Do It Yourself
- Have a copy writer and designer help
  - My Team: - organiccommunications.com
  - guarinographics.com
- Acupuncturemediaworks.com (discount code “tenoff”)
- Aaaomonline.org
- Bluepoppypress.com
- Redwingbooks.com
Yin Aspect of Marketing

Creating a Patient Newsletter

- DIY – Do It Yourself
- Work with copywriter and designer
- Acufinder.com
- Other internet email newsletter companies
- Frequency: monthly to quarterly

Patient Newsletter Content

- Usable, “actionable” info
- Purpose is to educate, inform & inspire
- Info about what you do, how it helps
- Upcoming events
- News – new certification, new staff, took a course/seminar, life developments, etc.
- Success stories
Yin Aspect of Marketing

Verbal Explanation

- In clear, plain language
- Stick mostly to Chinese medicine
- Ask successful practitioners how they explain things to patients
- Practice on friends & family
3. The Report of Findings (ROF)

This happens 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?
3. How long will it take?
4. What will it cost?
5. Will insurance cover this?
**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

More in LSS Module 5
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ROF Form Cont’d

Therapeutic Goals

___________________________________________________

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.

Patient Signature     Date

Free Online Business Course

With Michael Gaeta, at grasshoppereducation.com

● On patient communication & stages of care

● CEUs/PDAs available for LAc

● Appropriate for all types of practitioners

The Yin Aspect of Marketing

Patient Referrals

1. Results refer! Cultivate clinical excellence
2. It’s OK to ask for referrals
3. During or at end of a “positive” visit
   (patient is doing well and relates it to treatment)
4. Ask who they know who would benefit from your care
5. Offer to call or be available to speak with
   Aunt Bessie on the phone
6. OK to give them your card to pass along
7. Regular pt appreciation events
Tips for Encouraging Patient Referrals

- At the end of a positive visit
- They relate improvements to your tx
- Option: coupons for them to share with others, for free mini tx

The Yin and Yang of Marketing

Yang/External Marketing

Includes:
- Public Relations
- Community
- Internet
- Advertising & Signs
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What You MUST Do To Build Your Practice Quickly

1. “Results refer”
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

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External Marketing

Essential Elements of Speaking with Potential & New Patients

1. There is a health concern that merits attention
2. It is important to address/not ignore this concern
3. Conventional approaches cannot address the underlying cause of this concern, and harm the body
4. Your approach can effectively address this issue, both symptomatically and at the root/cause
5. Your approach is safe

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Common Questions People Ask

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?

Can You Help Me?

1. Yes, based on your direct experience
2. Your modality has successfully helped people with this (type of) concern
   - acknowledge your limitations
Yang Aspect of Marketing

Attracting New Patients – The Top Five

1. Give public talks & presentations
2. Write and publish articles
3. Mail and e-mail an announcement about the opening or expansion of your practice
4. Host an opening or annual Open House
5. Charity Week or Day

The Yang Aspect of Marketing

Public Relations
1. Public Relations – Overview
   ● Using the media to increase awareness of who you are and what you do
   ● More effective and more difficult than most print/conventional advertising
   ● Establishes you as an expert; instant credibility
   ● Goal is to cultivate relationships over time with reporters and editors
   ● Start with local publications
   ● Consider hiring a local PR firm

Public Relations Tips
1. Get quoted in the media
2. Write letters to the editor
3. Sit on an advisory or charity board
4. Press releases on certifications & accomplishments
5. Charity work
6. Promotional events
7. Publish a simple newsletter every 1-2 months
8. Network at business & community events
External Marketing – Public Relations

Cultivating Relationships with Media People

E.g. reporters, editors, bloggers

1. Feed them stories
   • New angle on current event
   • Patient success story—they often ask for a patient interview, quote, photo or footage

2. Offer yourself as a quotable expert

3. Press release on event

Dilbert On PR
Topics for a Press Release

- 2-3 weeks before the event
- Clinic grand opening
- Events, lectures, open house
- New practitioner
- Dramatic patient result – with permission
- Free events that are open to the public are eligible for PSAs

How to Write a Good Press Release

1. Answer the 5 Ws
   - Who - What - When - Where - Why
2. Concise and interesting
3. Not too long – one page
4. Include big headline, contact person & contact info at the top
5. On letterhead if possible
6. Use Business Wire to get the word out (about $100)
7. Put on your website Also PR Web
Community Marketing

1. Local (health) fairs
2. Lectures
3. Networking with local practitioners & businesses
4. Benefits for local charities
5. Join local Chamber of Commerce and civic/networking organizations
   - discounts to members?
The Yang Aspect of Marketing

Public Presentations

Speaking & Writing

How to Find Gigs

1. Make a list of everyone you know and ask them if they or someone they know would like you to offer a health lecture

2. Go through your local community yellow pages and call every small business, large corporation, condo, organization or group that might consider offering a health lecture

3. Use a speaker’s bureau to help you find gigs

4. Ask & look around for all of the “condition groups” in your area

5. Call your local libraries, civic organizations, Chamber of Commerce, networking groups, etc.
1. Be clear that your primary intention is to educate and inspire—to offer practical information that people can use to help themselves and others. Attracting new patients will naturally happen.

2. Select a topic:
   a. Your healing art, e.g. All About Massage Therapy, or “Ask the Massage Therapist”
   b. A condition or disease, e.g. Natural Approaches to Seasonal Allergies”
   c. A wellness benefit, Using Natural Ways to Improve Your Peace of Mind/Energy/Resistance to Disease”

3. Prepare participant packets:
   note paper, brochures, articles, your practice info & business card, incentive, etc.

4. Do you give a demo treatment?
   Maybe—Only treat yourself or someone you bring
   Do not treat a stranger from the audience
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Speaking Kit

- Bio
- Resume (optional)
- List of topics and brief descriptions
- Photo
- References & testimonials

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External Marketing

Writing Articles

1. The same principles & intent apply as with public talks
   - Give people practical information that they can use
even to help themselves and others
2. Contact all local publications, websites, organization
   newsletters, etc. and ask if they would like you to
   contribute a health article
3. Focus on publications that your target audience reads
4. Offer a byline and professional headshot with
   the article elance.com

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Networking

Definition: Connecting with others to help each other succeed

Types:
1. Informal – seeking out and connecting with other professionals
2. Visiting offices – call first
3. Formal – paid networking group, e.g. BNI, local chamber of commerce

External Marketing - Community Marketing

The Local Fair

- Booth, literature, props, bus cards, charts, tea
- Have a admin helper to handle appts
- Demo on helper – friend or family
- Go thru five steps
- Focus on quality of connection, not quantity of people you/your team speak with
- Have a two-chair consult area if possible
- To attract crowd: chair massage, demos through the day
- Offer free consult on site, or in office, discount on eval booked that day
The Yang Aspect of Marketing

Practitioner Referrals

1. Do excellent work, earn trust and a strong, positive reputation
2. Give referrals (carefully!) to other health professionals
3. Ask for patient referrals
4. Physician referrals (next slide)
Practitioner Referrals

1. Patient have and relate benefit from your treatment
2. Patient signs release so you can communicate with their physician
3. Quarterly (or more) short letters to that doctor about what you have been doing to help the patient and their progress
4. Thank you note for each referral from them

Content of Practitioner Letter
Keep it short! One page, Two paragraphs

1. Introduce yourself
2. Co-caring for patient since… (first tx)
3. Positive changes you have observed & patient has reported since then
4. Happy to discuss patient’s case w. them
5. Opt. ask for office staff to send some of their cards (include yours?)
6. You are encouraging patient to continue with their care with that practitioner/doc
7. On envelope, state “regarding (y)our patient”
Public Events

Grand Opening & Open House

1. Create a mailing list of everyone you know and who know you
2. Traditional: create an invitation or announcement card
   – use a local printer, sharper cards, medical arts press, histacount, vistaprint, etc.
3. E-mail as well
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External Marketing

Grand Opening/Open House

• Best: 3-4 hours on a Saturday morning (10am-1pm) or afternoon (1-4 or 5)
• Sunday & weeknights are OK
• Healthy refreshments (donated?), lecture, demo
• Special offer
• Have an assistant to help with running the event and to make appointments

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The Yang Aspect of Marketing

Charity Week
External Marketing

Charity Week/Day

- Win-win-win event
- Heavily discounted treatments (e.g. $25), all proceeds to charity
- Which charity?
  - Good: universally-supported organization
    - non-religious, non-political, e.g. hunger, children)
  - Better: a local individual or family in need
- Existing appts pay regular fee and you donate (e.g. $25) to recipient

Charity Week Cont’d

- Short visits
- Brief intake
- Simple gentle treatments, e.g. acu AE drain
- Schedule pt every 30 min
- Take time to educate

Example for a massage therapist:
- 10 min intake/palpation/etc
- 5 min educate, 15 min tx
The Yang Aspect of Marketing

Internet Marketing

New Media

In Order of Importance:
1. E-mail address on marketing material
2. Website
3. Site placement on search engines
4. Placement on websites that list practitioners
5. E-mail newsletters
6. Link exchanges with other websites
7. Search engine optimization (SEO)
External Marketing – Internet Marketing

Have a Website!

• **Build Your Practice.**
The Internet is the #1 way people search for practitioners. Over 250 million people in the US alone use the Internet today.

• **Essential Marketing Tool.**
This is your online calling card. Include in all your ads & marketing material. Potential patients want to be able to read about you.

• **Save Time for You and Your Staff.**
List your location(s), directions, hours, philosophy, background, intake and consent forms, how to prepare for your first visit, provide info about MT, FAQ, etc.

Fee Schedule on Website?

**Two Options:**

1. **Yes:** Full disclosure/transparency
   All info & fees on website & printed literature
   State that fees are subject to change without notice
   Optional: mention sliding scale

2. **No:** Require a consult/conversation/visit/call
   Wait until the prospective patient contacts you

**Either way:** Always explain fees & talk about money when they schedule visit (and at first visit)
Social Media Tips

Begin with end in mind – what do you want to accomplish – have a plan & goal – then use tools

1. Google Places, Yelp, Healthgrades, Google +, more
   - Get listed, make it easy to find you

2. Facebook, Twitter, LinkedIn, YouTube, etc.
   - Amplify your events, practice, etc.
   - Google Hangout, patients Check In on FB

3. Blog if you like writing – Wordpress, Google

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
4. Low-Cost Advertising

- Ask for remnant ad space in the back of a magazine or paper – free or low-cost
- Watch their publication deadlines (on website) for the right timing
External Marketing

Signage

1. Very important!
2. Uncluttered
3. Visually appealing
4. Modalities, conditions, contact info (web address, phone)
5. Density of copy depends on location

The Yin and Yang of Marketing

Putting It All Together
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.

4. Develop excellent phone skills: you & staff.
   Immediately make patient recalls.

5. Schedule multiple appointments.

6. Strong referral plan; 80% referral practice.

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, profound, healthy & balanced person.
Ongoing Reading, Seminars & Mentoring

Three Essential Areas:

1. Spiritual Mastery & Evolution
2. Clinical Excellence
3. Business & Finance
Recommended Reading

• All books, blog & everything by Seth Godin

• Getting Business to Come to You (book)
  Edwards, Paul & Sarah. G

• Entrepreneur Magazine, entrepreneur.com

• Business Mastery (book), Cherie Sohen-Moe
Online CEU Webinars for DC, LMT
With Michael Gaeta

In conjunction with Northwestern Health Sciences University
Visit https://www.nwhealth.edu/conted/distlear/
Click on “Nutrition”
Each one is 2 hours, 2 CEUs for DC or LMT

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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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

More in LSS Module 3
He who is ready to let go, and cease all strife and struggle,
is he who is ready to respond to Love.
Love is the Law of Expression in every human being,
and he who harmonizes with this great Law is he who begins to
live a glorious and happy life, here and now.
In this one Way is certain and absolute success,
no matter who the person is, no matter what he has
or has not done, and no matter where he is or is not.

Uranda
_Seven Steps to the Temple of Light_
EFFECTIVE MARKETING ON A SHOESTRING

Thank you!

Peace and success to you in the days ahead.

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With Michael Gaeta, DAc, MS, CDN

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THE YIN AND YANG OF PRACTICE BUILDING

By Michael Gaeta, LAc, LDN

A version if this article appeared in Acupuncture Today, April 2003.

"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. The principle of Yin and Yang is at work in all of life, from the smallest atom to the largest galaxy. 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

Michael Gaeta
Kew Gardens, New York
10 May 2002

Business skills and clinical skills are the two elements needed to create a fulfilling and prosperous acupuncture practice. When asked, “What is the greatest barrier to new patients entering a practice?” I hear different responses. “The cost of treatment,” or “Lack of consistent insurance coverage,” or “They’re not sure it will work” are a few common ones. Actually the main limiting factor, as it often is in life, is fear. In this case, it is fear of the unknown. “What’s it like in there? I wonder who does this kind of thing?” people think as they stand outside and look at your sign. “I don’t know much about acupuncture. Does it hurt? Can it help me”, they may ask of a current or past patient of yours. These questions are common ones, though the main thing in the way of their walking in, or following up on that referral, is fear of what is unfamiliar or uncertain. Generally, people come to you not because of what you do, but because of who you are. Your energy, presence, character, professionalism and integrity speak more than a stack of ads or informative literature.

So the question comes, “How do I dispel these fears?” The most important thing is to let people meet you, get a sense of who you are, and hear you talk about what you do. I have wasted thousands of dollars over the years in print advertising, which at best produces mixed results, except perhaps for the county Yellow Pages, which works fairly well. Ten minutes spent in a free consultation, or a few hours invested in giving a talk or writing an article, produces far more reliable results.

The purpose of a free consultation is twofold. First, you need to determine if you can help this person, and if they are someone you can successfully enter into a therapeutic relationship with. Second, the potential patient can learn enough to determine if you are the right practitioner for them.

Ideally, consults are done in your office. This removes much of their fear, gets them accustomed to coming to the office, and teaches them, through your office environment, staff, and their interaction with you, what kind of care they will receive. If a live consultation is not possible, phone consults are fine. Some patients will choose you over another therapist simply because of the care, patience, confidence and clarity you demonstrated in your phone conversation with them.
A consultation is not an evaluation. It is 5-15 minutes spent sitting down with a person to assess their needs and explain how you can help them. It is designed for those who are unsure if acupuncture is the right approach for them. The potential patient is at no risk, and invests nothing but time. There a few basic steps a good consult:

1. Ask an open-ended question like, “What brings you here?” or “How can I help?” This is also a good opening question for an intake/evaluation.

2. Listen attentively and patiently, though not allowing them to dispense their life story. Use clarifying or redirecting questions as needed.

3. Explain your approach to acupuncture—how it works, and how it will benefit them and their specific condition. Explain your fees. Speak with confidence and clarity.

4. Ask them if they have any questions about your approach, and if they would like to make an appointment. Whether they do or not, be sure to give them educational literature about acupuncture and your practice. Thank them for their time. If they are not ready to come in yet, remind them that you will be glad to help when they are.

Business is not about business. It is about people. Making personal, authentic connections with people is the key to success in business and in life. When polled, people consistently state that the most important qualities they seek in a health professional is caring, patience, and a feeling that they are important as a person. Being your authentic self, making yourself available and accessible through lectures, articles and consultations, is how you become a practitioner who does not need a net to lure people in, but who is a magnet, who attracts all that is needed easily, naturally and with ease.

"Surrender yourself humbly; then you can be trusted to care for all things. 
Love the world as your own self; then you can truly care for all things."

- Lao Tzu: Tao Teh Ching, Chapter 13

ABOUT THE AUTHOR

Michael Gaeta is an acupuncturist, nutritionist and bodywork therapist who began his New York practice in 1990. A graduate and faculty member of the New York College of Health Professions, Michael serves as president of the Acupuncture Society of New York (www.asny.org). He presents seminars on practice management, medical ethics, nutrition and Oriental medicine at schools and conferences throughout the US. Michael is also a pianist and composer. His passion is to give, love and serve through teaching, hands-on therapies and music.
Successful business people admit they are not skilled in all areas of business—no one can be. But they focus on doing what they do well, and surround themselves with experts in the other areas. The same principle applies to healing arts practice. If you are like me, you did not come into this field with a strong business background. My first career was as a full-time musician. While it is vital to develop good clinical and practice management skills, and be well-versed in the many aspects of your business, you cannot master everything. It is often better to do a few things well. As the saying states, “Many hands make light work.” It is essential to gather around yourself those who can advise you in key areas. They will make up for your gaps, and provide the business and clinical support that a well-rounded practitioner relies on. They can be broken down into two teams: your professional team and your business team.

Your Professional Team: for consultation and referral.
This team of clinicians can be divided into two groups—those that are essential and those that are helpful but not necessary:

**Essential:**
*Mentor:* All practitioners need a connection with someone more experienced than they are in their field. No one ever outgrows the need for a mentor. You consult with this person on tough cases, and refer to them patients who are beyond your level of skill. This person should have at least ten years experience in the field, and be willing to have you call on them for help. Later, as you gain experience, you can continue the circle and offer mentoring to a younger clinician.

*Psychologist or Psychotherapist:* All chronic health conditions have a mental/emotional component. While all healing arts practitioners should learn basic counseling skills, it is not our job to be a client’s psychotherapist. For patients whose mental/emotional difficulties are beyond what our empathic listening and support can encompass, we have an ethical responsibility to refer them to a good counselor. I do not recommend referral to a psychiatrist (MD); they tend to rely more on pharmaceutical intervention than on counseling. And a trained psychologist (PhD) or psychotherapist (MSW/CSW) can accurately assess the need for drug therapy.
Medical Doctor: Mrs. Compatello came in asking if I could help her with her hypertension. I replied that I would likely be able to help, and took her blood pressure. It was 210/150. She asked again, “Can you help me?” I told that that I’d be glad to help her, once she returned from the hospital. I asked her son, who was with her, to take her to the ER, explaining what would likely happen. She called the next day; her blood pressure was now managed with a new drug. She made a follow-up appointment, and we began to address the underlying energetic imbalance. As a complementary/alternative healthcare professional, when you see a condition that requires medical attention, you need to refer the patient to a good physician. Finding a general practitioner (family practice or internal medicine) doctor is a good place to start. Specialists can come later. Look for someone that you would go to, who also supports the use of complementary therapies. Patients frequently ask me for the name of an MD who will support, not ridicule, their decision to work with me.

Helpful:
These are natural therapies that complement acupuncture treatment. Each practitioner’s team may vary, to include modalities that they are not proficient in. Examples include:

*Bodywork Therapist, Nutritionist, Herbalist, Chiropractor, Wholistic Dentist*

Take your time and choose your professional team carefully. To a patient, how good these clinicians are will reflect on you as much as on them. Also, referring a patient to a practitioner often results in referrals back to you. Developing a team of practitioners in other fields is in keeping with the principles of wholism. It allows you to draw on the vast combined knowledge of many other health professionals, and develops an often-lacking sense of community among individual clinicians.

About the Author

*Michael Gaeta holds New York State licenses in acupuncture, nutrition and massage therapy. He received his Master’s degree from the New York College of Health Professions, where he was a faculty member for ten years. In 1990, Michael founded the Hands-On Health Wholistic HealthCare Centers, a successful group practice with three locations in New York. Michael is past president of the Acupuncture Society of New York. He writes for local and national publications, and presents seminars nationally on business success, nutrition, medical ethics, herbal therapy and Chinese medicine. Michael is also a pianist and composer. His passion is to give, love and serve through teaching, hands-on therapies and music.*
YOUR BUSINESS TEAM

By Michael Gaeta, LAc, LDN

This article appeared in the Pulse newsletter of the American Association for Bodywork Therapies of Asia, and the Meridian Times magazine of the Acupuncture Society of New York.

As discussed here in “Your Professional Team,” one key to practice success is to realize that you do not need to master every aspect of business to succeed. Draw to yourself those who have expertise in areas that you are weak in. Then learn from them and let them help in those areas. You will rest in knowing that things are being cared for well, so you can focus on helping people and overseeing your practice. The second team of advisors you need we can refer to as your business team. They provide the financial, legal, business and administrative expertise you need to succeed. The most important ones are:

Accountant: This person is by far the most important one in this team. Your accountant makes sure you have the right legal setup, helps you set up and maintain your bookkeeping system (you can even pay them or their firm to do your bookkeeping), prepares your quarterly and annual tax returns, and is there to answer questions that inevitably arise in the course of running your practice. Good accountants can ensure that you maximize your legally-allowable tax deductions, and help your practice grow. Be sure to interview a few accountants before selecting one. Find one that has small business and medical practice experience; a corporate or personal tax accountant may not have the expertise you need. Many practices pay their accountant a monthly fee that includes unlimited advice, regular review of the books and tax return preparation.

Attorney: Most businesses use a corporate lawyer to help them create the right legal setup other than a sole proprietorship (which is essential). The field of law is even more specialized than accounting, so make sure your attorney has small business and medical experience. Practitioners starting out may find that their accountant can access most of the legal advice and services they need through the accountant’s professional team. Other types of attorneys you may need as your business grows include those who specialize in tax strategy, real estate, intellectual property (e.g. trademarks and copyrights), and estate planning.

Banker: This is the person at your bank that you work with most closely. Often this is the branch manager or a loan officer. This person will help you set up your business checking and savings accounts, acquire business loans and credit cards, and guide you through other bank-related issues. Be sure to select someone you are comfortable with, and work with them exclusively as much as possible. It is important to develop a long-term relationship with this person, especially if you need a business loan.
Business Consultant or Marketing Advisor: These people help health professionals create strong practices through effective office procedures, business, marketing and advertising plans, and staff development. They are most helpful when a practice is ready to grow to the next level, or when a good practitioner’s practice is faltering due to lack of clear vision or follow-through.

Mentor: This is a successful practitioner in your field who can provide guidance in the business side of your practice. This need not be the same clinical mentor from your professional team, who is there for consultation and referral. Your business mentor knows your business best of all, having “been there and done that” for years. They will help you avoid common mistakes, and give you invaluable advice on the infinite subtleties of running a strong acupuncture practice.

In-House Staff: These people work closest with you, day-to-day. Included here is your front office staff (e.g. receptionist) who interact with patients, back office staff (e.g. bookkeeper, insurance billing person), and other practitioners you may employ. (Check with your state association, licensing board, accountant, attorney or business mentor to find out how to legally employ other practitioners). Your in-office staff frees you up to do that. The most important thing is to hire first-rate office staff. They are often a patient’s first contact with your office, and they can make or break a practice. The goal is for you to spend most of your time doing things (e.g. treating patients, overseeing the practice) that only you can do. Learn to delegate, train them well, and work as a team to create a positive and peaceful office environment.

Other important professionals include your insurance agent, to advise and set up all necessary insurance—including professional, business and personal liability, property, automobile, disability, health and life. You generally receive discounted rates if you hold multiple policies with the same company.

Your professional and business teams form the “immediate family” of your acupuncture practice. If that core group is strong, then the extended family of your patients will grow and thrive. Remember that business is not about business; it is about relationships. Cultivating and nourishing strong, positive relationships with people is the sure way to practice success.

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Successfully Begins at Home

Michael C. Gaeta, LAc, LDN

Lately I have been reflecting on my life. I have been assessing where I have been, where I am, where I am headed, and if the pattern of my life is congruent with my highest vision and deepest purpose. Perhaps it is the new year, perhaps it is knowing that in six months I will have my first child, perhaps it is feeling greater spaciousness after completing a five-year cycle of service through the Acupuncture Society of New York. Such times of stepping back and looking at my life—the quality of my days and relationships—has been an essential practice.

Indeed, the unexamined life is not worth living. Socrates spoke these words to the jury in the court of Athens in 399 BC, after he had been found guilty of heresy and sedition for speaking the truth—truth which conflicted with the structures and ignorance of his time. For his refusal to violate his integrity, he was sentenced to death. Speaking in his defense, Socrates explained that he felt it was his responsibility, “to let no day pass without discussing goodness and all the other subjects about which you hear me talking, and examining both myself and others.” He felt that this activity, “is really the very best thing that (one) can do, and that life without this sort of examination is not worth living…”

One thing I have been examining is success. What is success? How is it measured? What creates it in a balanced way? Many successful people and great thinkers have said much on the subject. Some of their thoughts have found their way onto motivational mugs, posters, and the like, as well as a Kunlun mountain (BL 60) of books and audio programs.

Bessie Stanley (1867-1941), in her 1905 poem mistakenly attributed to Ralph Waldo Emerson (1803-1882), had this to say about the subject:

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.

For me, success is being my authentic Self for the good of the whole. It is serving love’s purposes above personal preferences and hurts. Success is expressing the finest quality of character I can, in each situation just as it is, without requiring that it be otherwise. It is to
express the truth of love in my living, without concern for results. Success is expressing the positive, creative, initiating energy of spirit through my thoughts, words and actions.

Every successful man I have heard of has done the best he could with conditions as he found them, and not waited until next year for better. - Edgar Watson Howe

After graduating acupuncture school in 1996, I drove cross-country alone. Before changing my practice to include the art of acupuncture, I wanted to clear my mind, and replenish study-depleted Qi. On that journey there were days, like today, of stepping back and gaining perspective. Late one night, with insect sounds and moonlight filtering through my tent, I awoke with a question I had been pondering, “What is the measure of a day, of a life?” The answer then came, “To the extent that I brought love into the world this day, regardless of how much I accomplished externally, this was a good day.” In other words, a successful day. What is true of a day goes for an interaction with a patient or colleague, a career, or a life.

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

- Albert Einstein

Success also refers to being effective in the world. It is allowing excellence, creativity, and abundance to manifest through our work in the world. A practical and transcendent perspective on work was presented in an address entitled The Extraordinary Privilege of Selfless Service, given by my friend Yujin Pak last Autumn:

At the material level of work, show up, and on time. This is part of what builds a powerful container. We are responsible and accountable. And then, having shown up on time, create excellence where we are.

What about the spiritual aspect of the work life? There is another responsibility beyond the one of showing up on time, to create excellence. Engage in that outer work from the highest inner level of perspective. Not only engaging in the work in an excellent way, but doing so from the highest perspective possible, and therefore delivering vibrational world service through the work we have at hand. There is enormous opportunity to engage in work consciously and mindfully so that the factors that arise through our work—of thought, feeling—are used as contact points for spiritual radiation into the world.

The last one is, enfold the emergence of others. This is part of our work responsibility. Enfold and nurture the emergence of those around you. How conscious are you of the process of birth and emergence in those around you? And how willing are you to provide thoughtful enfoldment and encouragement to them? This is part of our responsibility and accountability in the privilege of serving.

What brings success? First, I thought it was just about working hard. So I did. I worked so hard I burned out. The money and accolades I earned seemed shallow and fleeting, as my body crashed from my ambitious excesses.
Then I thought success came just from working smarter. I delegated and held back, so I would not burn out again. I took it slow and easy. It worked to a point, but I was bored and uninspired. I did not feel fulfilled because I was not fully engaged with my work of treating patients and teaching. I coasted, fearful of pushing myself too hard again, and found that wanting too.

What produces success in an internal or external sense? What creates spiritual or worldly success, which are deeply connected anyway? It has to do with expressing the finest quality of character we can in each situation. Since everything is connected, and we live in a holographic universe, the spirit that we express in each moment and situation affects every other aspect of our life, and the whole of the cosmos of which we are a part. And it has to do with the closest relationships we have—those with whom we share the deepest spiritual intimacy. It is about how we care for the things and people most sacred to us. How deeply are we centered in that which is most central and our lives? Or are we generally distracted or governed by our problems, issues, past, desires or fears? A teacher of mine once said that integrity is the refusal to violate sacred things. How committed are you to holding sacred what is most precious to you, what is most central in your life? For me this manifests, in part, as the clarity and love that is present between me and those closest in my heart. And they are not always those with whom I spend the most time. Some of those closest to me I see quite infrequently.

Lao Tzu, in the *Tao De Ching*, says that the wheel has many spokes, but it is the hub that makes it useful. The hub is our innate spiritual identity, our true Self. The hub is also the core of those with whom we share the deepest heart connection, the deepest pattern of spiritual agreement. The spokes of the wheel are the lines of force or energy that connect who we are with our work in the world. The outer rim of the wheel—the tire on the bicycle—are the myriad expressions of our lives, our work in the world, what we create in form.

David Karchere, a close friend and mentor of mine, spoke of this recently in an address entitled *The Momentum of the Flywheel*:

> Where is our greatest point of leverage for the movement of that flywheel? It can seem to be about our external pattern of service and leadership—and those things are important. I think there’s another range of our function that is at least as important, and probably more so, where we have the greatest point of leverage for our work. It is the field of our closest spiritual relationships. It has to do with those people with whom we share the greatest spiritual intimacy.

So success begins at home. Not home and an external sense of those we live with—family or roommates. But home as the place inside where what is most sacred and precious can live and grow and be safe. If that is right, then external achievement comes without effort or struggle. Do I spend time in the still place within—the quiet place inside, where nothing is wrong, and all is well? And from there invite my world to know and share the same? Are the relationships I have with those closest to me honest and true? Do I support in the flowering and emergence of those close in? Do I provide a place of sanctuary for them, which helps them fly? Or do I make them constantly deal with my human nature characteristics, my “stuff,” so I don’t have to? Do
we hold each other’s hearts as safe and precious? Is there something stable between us, that is not shaken by things which come up to be worked through? If not, then what I can create in the world will be quite limited, and will only come by much struggle and sweat of the brow (and depletion of Jing). If the pattern of agreement between the ones who are closest to me spiritually is right, then success in the world is a piece of (organic) cake.

David Karchere went on to say:

These are core issues in our lives. I think they give indication as to how that flywheel gets moving in a way that serves our world. It moves as that closest circle of relationships is handled in the finest way in which we’re capable of handling it. Ultimately, that movement begins with me. It comes back to my clarity with Source, because only as that’s present can I be creative in those relationships. And if there’s something creative happening through me at this most central level of function, if something big is happening there, then the rest is easy. And if that’s not happening in my closest relationships, the rest is never going to happen. I’m not going to be doing great things out there in my world if what’s happening in those people with whom I have my closest relationships is not supremely creative. I suppose I might be able to create something, but nothing of great value.

I invite us to truly pay attention in this area and to do our work—the work of letting personal transformation proceed so that we open enough to let the greater spiritual radiation come through. That radiant energy allows our closest relationships to be creative, and it powers our collective movement.

Tom Stanley, PhD, discusses one aspect of this principle in his research. In his book *The Millionaire Mind*, he interviewed over 1,100 millionaires to find the habits and attitudes they found essential to their success. One of the top five success factors they noted was having a supportive spouse. For me, this is more than having a beautiful wife to accompany me at social and professional functions. It is creating together a field of stability, of harmony, of centering in that which is higher, that fills and permeates my home, and then goes out from there to energize my work in the world. The same applies to those few who are closest to me in what is most precious and central in living.

I have known times in my practice, teaching, and association work when things were not working well at all. The practice was slow, my treatments and lectures uninspired, legislative and inter-association issues seemed overwhelming. At those times, invariably, there was conflict, or at least a lack of clarity and vitality, in my core relationships.

When the practice has been “smokin’”—full appointment book, deep and effective interactions with patients, brilliant and moving lectures, and a sense, in legislative battles, that I was part of an irresistible force (“resistance is futile”), there has been a common thread. Things were right within, and with my inner circle of companions. There was stability, a steadiness held over time, which brought to bear in more public areas of my life a positive, creative and radiant energy of spirit, which is indomitable.
So I invite you in these days to reflect with me on these things. Together, let us identify with and express the positive, creative, initiating energy of Spirit. Let us see how we can more deliberately care for, love and appreciate those who love what we love, who are in agreement with us about what is most central and precious and our lives. If we can make that clear, strong, right, steady and stable, there is no limit to what we can accomplish in our world. It is the deep and potent movement of spirit through us and those closest to us that magnifies the radiance of life coming through us, in service and blessing to our world. Let our hub be right, and the spokes will have no limits. Just as the superhot and pressurized core of the sun produces its awesome radiance, so let what is right at our core radiate out into our world. This is the true source of our success and fulfillment in our lives, and in our world.

Forest Hills, New York
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About the Author
Michael C Gaeta, MS, LAc, LDN, past president of the Acupuncture Society of New York, has been in practice since 1990. He teaches his seminar, *Love, Serve and Succeed: Life and Practice Success for AOM Professionals*, at schools and conferences throughout the US. He may be reached at 718 847 7278, mgaeta@nyc.rr.com, www.gaetaseminars.com.
A man was once given a small corner of a vast garden to tend. He cared for it well—weeding, seeding and watering the land with love and attention. Over time, his modest corner of the garden flourished, teeming with abundant life. Under the man’s hand, lush greenery, vibrant flowers and rich scents filled the small parcel of land, to the blessing and delight of all who entered or saw it.

Since the man had proven himself capable of caring well for that which he was given, he received more of the garden to tend, expanding the size of his corner to include some of the adjoining land. He welcomed the new responsibility with gratitude, seeing the challenge as an opportunity to bring more life and beauty into the world. He cultivated his larger corner of the garden with the same great passion and respect, and before long, his corner grew again and then again, steadily over time.

Great was the beauty and the blessing he brought into the world. His life’s work inspired many to attain greatness and magnificence with their own part of the vast garden. Through his example, the man helped many find peace, joy and fulfillment through making their own land a unique and glorious expression of who they are.

Not far away, another man was also given a small corner of the great garden to tend. He resented it and felt that he was badly done by. To him, it was unfair. He felt he should be given a different area, one that was already great and beautiful, not the sparse one he had. He did everything he could to resist how things were. Grumbling, he did the minimum required to keep alive what little plant life there was. He complained a lot to his neighbors, speaking of little else but what was wrong with his lot of land and his lot in life. Under his faltering, undisciplined hand, the land that was his to keep languished, becoming overgrown with weeds, which choked the life from the flowers and other plants. Eventually even the weeds became dried and brown, withering in the breeze and sun.

One day he came to his corner of the garden to find that much of it was gone, given to others to tend. What remained of his was tiny, just a few yards across. Seeing this, he became still more angry and resentful, complaining all the louder of how badly life was treating him. He inspired only discord, discontent and joylessness in those listened to him and took in his words. The result of his life was greater darkness, ignorance and ugliness. The garden had no more beauty for his presence.

This simple and obviously metaphorical story illuminates several principles of life. Without naming each one, we see the basic teaching is that if we welcome and care well for that which we already have in our creative field of responsibility, life will give us more.

In a healthcare practice, this idea takes form as caring for people well, to your highest vision of what that means. It means making care as least as important as cure, compassion at least as important as correction. It means giving all the people you contact through your practice the beautiful gift of who you are. The result of this is that your practice will grow, steadily if not quickly. And you will earn a fine reputation as a practitioner and as a person—something
beyond price or measure, something hard won and easily lost. If you care well for the patients you have, stay concerned more with the depth and fineness of care you provide than with just “getting more of them in the door,” letting your practice be filled with the finest qualities of who you are, then you need not worry that your practice will grow strong and full.

One practical expression of this principle is a process I refer to as “walking the charts.” This is one of the most important habits I have developed over the twelve years I have been in practice. I know that if “the book is thin,” meaning that I have many gaps in my clinic appointment book, it is because I have not walked the charts recently enough. After I do walk the charts, the book is soon full again. It is that simple. This process is a way to care for people well, the way I would like to be treated. It is a way to improve my clinical skills and outcomes. It is the most effective way I minimize attrition—patients who fade from my active list onto the inactive list. Losing patients through attrition can easily nullify new patient gains. And constantly working with mostly new patients can be tiring. Finally, walking the charts is deeply satisfying and spiritually nourishing. It affords me the opportunity of helping a patient heal, even though they are not physically present. And since no one is healed alone, this process is a profound form of self-care and nourishment. It feels really good.

Walking the charts requires a little preparation. It is important to block off a chunk of time—at least 30-60 minutes—to do it. This is not something you squeeze in between patients or over lunch. It feels best to set aside one to two hours at each sitting, or “walk.” All you need is your desk, your patient charts, your clinical reference and appointment books, and a phone. By the way, this is not something you can job out to your staff. I tried that, and it does not work. This is between you, the patient, and Universal Intelligence, or Source.

The first step is to sit down and center yourself. Take a moment to breathe deeply, relax your body, quiet your heart, and bring your attention mindfully to the moment. Begin with stillness, gratitude and ease. Open yourself upward in thanks to Life for bringing you to this moment, and for all that is present in your world. Calm up.

Next, pull out the first patient’s chart from the “A” section. Let’s say the patient’s name is Sharon Anderson. Bring her to mind. Look at the notes from her last visit. See if she is in your appointment book. If appropriate, call her. Examples of when it would be fitting to call include: if you treated her for a cold or other acute condition in the last few days; if she just had her first treatment with you; if she has not been in recently or does not have her next appointment scheduled. Let her know, if you speak with her or leave a message, that you are just checking in to see how she is doing.

I do not mention scheduling the next appointment on the message machine, or to her until the end of the conversation, if at all. If I speak with her, and she had not been in to see me in some time, generally she will say something like, “Oh, I’ve been meaning to call you for an appointment.” Patients usually get it that I would like them to return just by the fact that I called. It is important that the patient understands that I am not calling just so they will come in again. I am genuinely interested in how they are doing and feeling, and answering any questions they may have. My clear intention is to care for them in the way I would want to be cared for. Patients deeply appreciate these calls. It is a tangible expression of caring that they value and remember.

If a patient has not been in to see me for a while, and I leave a message when I call, I will do so three times before deactivating that patient’s chart. I just let them go after leaving them three messages, once each time I walk the charts.
As a teacher of mine often said, “You can serve only on the basis of response, not need.” This could, and perhaps will, the subject of a whole other article. It will suffice for now to state that people must be open to receive that which you offer—be willing to be helped—for you to help them. You need only concern yourself with patients where there is a pattern of response to your services. Be unconcerned with unresponsive patients. You cannot help them anyway, so let them go.

Finally, I write in the chart what happened—date, left a message or spoke with her, and pertinent details. If this was the third message left, I deactivate the patient’s chart by placing the pages in a storage folder, to be filed in our storage room.

The next step in walking the charts is to prepare fully for that patient’s next visit. In this example, I review Sharon’s chart to see if I am completely prepared for when she comes in again. If there is research to do, I do it. If I need to re-evaluate my assessment, or create or modify her treatment plan, I do it. For example, I may wish to change her herbal formula, or look up point combinations to consider for her next visits, or make notes on questions I want to ask, or consult with a mentor or colleague on the case. Whatever needs to be done, I do it right then.

The result of this step is that I am quite confident when Sharon arrives in the office again. She will most likely feel it, and share that confidence in me. I will be at ease in my readiness, which helps her be at ease too. My clinical results will be optimal, since I gave myself time to think about her case. And I will not be “winging it,” which does not feel good or work well, and produces fatigue by the middle of the treatment day. As my first acupuncture teacher often said, “Make good preparation. Then you can do your best work.” This step helps take care of the rational/analytical thought that complements the intuitive sensing that happens spontaneously in the treatment room.

The walk ends with taking a moment to silently bless the patient. You can think of this as sending them good Qi, offering them positive thoughts or intentions for healing, or whatever words you would like to use. Whether or not I have called and spoken with Sharon, I take a moment to use my capacity, which each of us is born with, to bless this person. It is to seek and see in her the highest and finest qualities she has, to actively seek and find what is right in her, and acknowledge it within myself. This is my favorite part of walking the charts, because it always produces an immediate feeling of peace and well-being—the feeling that I am doing what I came on earth to do, fulfilling my deepest purpose: to love and be a blessing to all those in my world.

That completes the process for the first patient. With gratitude and satisfaction, I return Sharon’s chart to the cabinet, and pull the next. I continue this process until I have gone through all my patients, or until I run out of time. Working with a single chart may take a minute or an hour, perhaps more if I am preparing for their “report of findings” visit. I take my time, knowing that in this process, as much as in any other area of my life, quality, not quantity, is everything.

I have tried rushing through them (that’s “running the charts”), and it does not work. I do not get as much out of it, patients sense I am rushed on the phone, and the book does not fill up the way it should. I walk my charts at least once a month, ideally twice. If I let it go longer than that, attrition invariably results, and the practice suffers. I am then like the man who let his garden decay, only to see it shrink in size and vitality.
I have mentioned a few times that after I walk the charts, the book fills up. I need to emphasize that that happens whether or not I talk to any patients or even leave any messages. I have spent an hour or two working the process, not make a single call, and the next day come in to find 15 messages on the machine, some from patients who have not been in for months or years. Life is about energy. If the energy you express is right, then all right things come to you.

Like the wise man of passion and integrity who cared well for his corner of the garden and saw it grow in beauty and then in size, so too is walking the charts a remarkable way to care well for those in your creative field of service. Do it, and watch your garden grow and flourish, to the delight and blessing of all those who enter or see it.

Summary of the Steps in Walking the Charts:
1. Center yourself
2. Call the patient if appropriate
3. Treatment planning for the next visits
4. Silently bless them

Michael Gaeta
Kew Gardens, New York
14 May 2002

About the Author
Michael Gaeta is an acupuncturist, nutritionist and bodywork therapist who began his New York practice in 1990. A graduate and faculty member of the New York College of Health Professions, Michael is past president of the Acupuncture Society of New York (www.asny.org). He presents seminars on practice management, medical ethics, nutrition and Oriental medicine at schools and conferences throughout the US. Michael is also a pianist and composer. His passion is to give, love and serve through teaching, hands-on therapies and music.
Setting Up Your Practice

1. Business Registration and Forms
   • Contact the City Tax Collector to determine if you must register your business.
   • Contact the Secretary of State’s office to determine if your business name is valid. (This only applies if you are going to engage in business outside your country or if you plan to form a corporation.)
   • If you are going to operate your business as a corporation, prepare and file incorporation papers with the State Department of Corporations. You will also have to draw up Articles of Incorporation and Corporate By-Laws as part of the process.
   • Apply for a Taxpayer's Identification Number from the IRS and see which tax forms you will need.

2. Business Permits and Licenses
   • Check with City & State Licensing Divisions to see if a license or permit is needed to conduct your business. Obtain required licenses.
   • Check with the local Zoning Department to determine if you can legally operate your business at your intended location.
   • Check with the State Tax Board to see if you need a Seller’s Permit. Obtain a Seller’s Permit.

3. Hiring Employees
   • Register with the State Employment Development Department if you intend to hire employees.
   • Obtain and display state- and federally-mandated employee information (if you become an employer).
   • Obtain Worker’s Compensation Insurance if you become an employer.

4. Business Activities
   There are many tasks that need to be completed to ensure your business gets started right. These tasks range from determining whether or not you’re ready to be a business owner to setting up files and other recordkeeping items.

   A. Startup Issues
   • Determine whether you are ready to start this business.
   • Do a feasibility study to assess the viability of this particular business.
   • Decide whether to operate as a sole proprietorship, partnership, or corporation.
   • Begin writing out your business idea in the form of a business plan.
   • Begin lining up sources to finance your venture.
B. Sales & Marketing
• Set long-term and short-term goals for your business.
• Develop a marketing strategy to achieve your business goals.
• Determine who your customers and competitors are.
• Design and order stationery and business cards.
• Plan your sales and distribution strategy.
• Plan your advertising, sales promotion, and publicity activities.
• Develop price strategies and compute your break-even point.

C. Business Operations
• Develop customer service policies.
• Line up suppliers and order start-up inventory and supplies.
• Develop operating procedures.
• Acquire the necessary equipment and machinery.
• Choose a business location and negotiate and secure the lease.
• Develop security measures to protect your business assets.
• Determine appropriate insurance coverage needed to cover the risks inherent in your business & select an insurance agent or broker.
• Apply for the appropriate copyrights, trademarks, or patents necessary to protect your intellectual property.
• Plan your staffing requirements and hire the necessary employees.

D. Finance and accounting
• Set up files and other recordkeeping systems.
• Set up procedures for accounting and bookkeeping.
• Familiarize yourself with financial statements and their use.
• Choose a bank and open a business account.
• Familiarize yourself with local, state, and federal tax requirements and submit the required documents.
• Set up cash management procedures for conserving cash.
• Set up expense and income forecasts.
• Set up cash flow forecasts.
Accounting Overview

Keeping Track of Your Business

Keeping your financial records up-to-date will not be a problem if you do what is necessary on a regular basis. Here is a list of the most common tasks required to maintain accurate accounting records.

Daily tasks

• Total cash on hand. Total the amount of cash in the cash drawer or register.
• Record income. Add up receipts and invoices, and print cash register tapes.
  Enter a summary of sales and cash receipts in an income ledger.
• Record payments. Deduct checks from the checking account balance.
  Record cash payments in the petty cash account.
• Enter deposits. Add deposits to your business checkbook to keep the balance current.
• Record inventory. Add items received to inventory records.

Weekly tasks

• Review accounts receivable. Enter billed invoices on an accounts receivable journal form. Scan to see who owes you money; be particularly alert for past due accounts and take action to collect from slow payers.
• Review accounts payable. Pay bills when due, but time your payments to manage your cash flow, remembering to take advantage of discounts.
• Prepare payroll. Compute each employee’s payroll on an employee payroll register form.
• Deduct items sold from inventory. Adjust inventory records to reflect the week’s sales on an inventory control card.

Monthly tasks

• Balance checkbook. Reconcile your checking account records to the statements sent by your bank to make sure that both sets of records are in agreement. Use a bank account reconciliation form.
• Total all ledgers. Compute monthly totals for sales, expenses, and payroll.
• Make tax deposits. Report, file, and remit withheld employee income taxes and other taxes. Depending on the amounts involved, these tax deposits may be due quarterly or irregularly instead of monthly.
• Age accounts receivable. Update your unpaid accounts, listing them by length of time on the books—that is, 30, 60, 90 days, and so on. Use this list to discover which slow and bad accounts require extra collection attention.
• Review inventory. Review the inventory control cards. Check inventory levels to see which items aren’t moving so you can replace them with new stock.
• Reconcile petty cash. Use a petty cash record to make sure the actual cash in the petty cash box plus the total of the paid-out receipts for expenses from petty cash is equal to the starting balance. Replenish if necessary.
Quarterly tasks
• File estimated tax returns. File federal and any other estimated income taxes. See government tax publications for actual due dates.
• Remit sales taxes. If required, fill out a state or province sales tax report and send it in along with a check for the amount of sales tax you've collected. You may be required to remit sales taxes monthly or annually instead of quarterly, depending on the amounts involved.
• Prepare income statement. This will reflect the sales, expenses, and profit for that quarter and for the year-to-date.
• Prepare balance sheet. This will indicate the financial position of the business at the end of the quarter.
• Prepare cash flow statement. This will reflect the cash activity and ending position for the quarter.

Annual tasks
• Total all ledgers. Using the forms mentioned earlier, compute yearly totals for sales, expenses, and payroll.
• Prepare annual income statement. This will reflect the sales, expenses, and profit for the year.
• Prepare annual balance sheet. This will indicate the financial position of the business at the end of the year.
• Prepare cash flow statement. This will indicate the cash activity and ending position of the business at the end of the year.
• Send out 1099 forms. Complete and mail a 1099 form (Statement for Recipients of Miscellaneous Income) to each independent contractor who earned over $600 from you in the previous year.
• Send out W-2 forms. Complete and mail a W-2 form to each employee who worked for you in the previous year.
• Assemble tax papers. Pull together all the documentation you're going to need for filing your income taxes.
• Meet with your accountant. Turn over your tax documentation and set up a time to discuss your financial condition and tax strategy for the coming year.
• Set up new books. Prepare for the coming year by setting up your ledgers.

Accounting Tips
1. Find a good accountant with small business and medical experience.
2. Use a paper (e.g. One-Write) system for 1-2 years, then upgrade to computerized accounting.
   I use QuickBooks Pro, from Intuit (888.246.8848). Other fine programs include Peachtree, MYOB.
3. Use your accountant to help you get set up properly - ask many questions, take good notes.
4. After you get the hang of your own bookkeeping, hire a bookkeeper to come in weekly or monthly.
Managing Your Future
Advice from Some of the World's Most Successful People
By Jeff Moses

Many successful men and women have commented on principles that led to their success. Often it seems that these principles are universal, and that they have been the guiding theme of almost every successful person's life. Below are seven success principles based on advice from individuals in a variety of fields.

1. As Charles C. Noble once said, 'You must have long-range goals to keep from being frustrated by short-range failures.' It is important for a person to know where he or she wants to go, so many experts in the field of success management suggest writing down specific goals. For instance, write down exactly what you want to have achieved one year from now, five years from now, and ten years from now. Then, write down exactly what you have to do to get there. This plan will help keep you on track so that you are not thrown off by short-term failures.

2. Abraham Lincoln said, 'Always bear in mind that your own resolution to succeed is more important than anything else.' If successful people agree on any single point, it is that their own inner resolution to achieve their goals was powerful enough to overcome all outward obstacles. Set your vision high, then resolve to achieve your goals.

3. Do not be afraid to fail. Most successful people insist that they learned more from their failures than from their successes. In fact, many successful people have failed at many things they have attempted. The important thing is that they did not give up. 'The successful man will profit from his mistakes and try again in a different way,' said Dale Carnegie. This theme is echoed throughout the volumes of success literature. 'Failure is only the opportunity to more intelligently begin again,' Henry Ford wrote.

4. Determine that you will excel in your chosen field. As Vince Lombardi said, 'The quality of a person's life is in direct proportion to their commitment to excellence, regardless of their chosen field of endeavor.' Many times a person who is having difficulty in their field needs only to gain further training in order to be successful. Never regret or avoid spending time at improving yourself. In almost all cases, the most successful people are the most equipped to achieve excellence.

5. Do not give up your values along the way. Malcolm Forbes once commented, 'Contrary to the cliche, genuinely nice guys often finish first or very near it.' You do not have to sell out to succeed. Seek out business relationships with others who value honesty and ethical behavior. Creating and nourishing such relationships will provide a foundation for your own success.

6. Persistence is the key to meeting goals. On this topic John D. Rockefeller wrote: 'I do not think there is any other quality so essential to success of any kind as the quality of perseverance. It overcomes almost everything, even nature.'

7. As a person's career progresses, inevitable ups and downs occur. Many unplanned obstacles appear along the way. In the face of these, courage is necessary, because only courage can keep a person on target. 'Courage is resistance to fear, mastery of fear, not absence of fear,' said Mark Twain. 'You gain strength, courage and confidence by every experience in which you must stop and look fear in the face...You must do the thing you think you cannot do,' wrote Eleanor Roosevelt.

Such principles are the key for entrepreneurs to reach the goals they have set for themselves. Studying the world's success literature enables a person to understand how others have been successful. Taking these great words to heart is an important aspect of managing our own successful futures.
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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A SMART GUIDE TO HEALTHFUL CHOICES

As Americans, most of our basic (health) freedoms are under assault. We face mandated health insurance, mandated vaccines, disappearing choices of healthy foods, unlabeled genetically modified foods, and more. With only 5% of the world’s population, we consume 40-50% of world’s pharmaceutical drugs. Some of the ways you can retain your health freedom include choosing which health interventions you want for yourself and your family, eating non-genetically-modified foods, consuming healthful, safe, raw dairy products, using direct-to-patient laboratory services, and seeing natural health professionals who educate you about how to care for yourself and your family without drugs.

Online Resources

Healthy Foods:
localharvest.com  seleneriverpress.com  eatwild.com
seedsofdeception.com  responsibletechnology.org  realmilk.com

Online Laboratory Analysis:
• Blood and urine testing, and more
• No doctor’s prescription necessary
• Order and pay for tests online, select local draw center, receive results online in a few days
• Not available in NY, NJ, MA or RI.

Sites to Use:
• privatemd.com  10% discount code: wellness10
• www.directlabs.com/online

Hair Mineral Analysis:
Ask your natural health professional about tissue mineral analysis. It is a non-invasive, painless and inexpensive way to accurately assess heavy metal toxicity, oxidation rate, thyroid, adrenal, overall vitality, protein intake/metabolism, blood sugar and sex hormone balance.

Vaccines:
nvic.org  mercola.com  vaccinationnews.com
thinktwice.com  vaccinerights.com  naturalnews.com
Clinical Topics: Success with Natural Medicine
Nutritional & Herbal Medicine, Diet & Lifestyle Counseling to Improve Patient Care
Since January 2001

Note: Seminar lengths listed are optimal for that topic. They can be shortened as needed for your program, or for a 1-2 hour webinar. Combine desired topics to create a 1-2 day program.

Core/Foundational Seminars: Principles & Application

On Wholistic Nutrition

• Understanding Whole Food Nutrition: Wholistic vs. Pharmaceutical Nutrition. 12 hours.
• Protomorphogen Therapy and Autoimmune Disease. 4 hours.
• The Core: Natural vs. Synthetic, and Foundational Nutritional Support for All Patients. 4 hours.

Combining Western Herbal Medicine with Whole-Food Nutrition

• Ten Essential Botanicals for Clinical Practice. 12 hours.
• Kerry Bone’s Essentials: Key Herbal Formulas for Clinical Practice. 12 hours.
• Growing the Circle: Integrating Clinical Nutrition & Western Herbs into an Acupuncture/Chinese Medicine Practice. 16 hours.
• Survival in the Modern World: Mediherb Formulas and their Nutritional Synergists. 12 hours.

Clinical Topic Seminars: in-depth education on essential clinical/health areas

Major Conditions

• A Wholistic Approach to Promoting Cardiovascular Health. 12 hours.
• Healing the Center: A Wholistic Approach to Improving Digestive Health. 4 hours.
• A Wholistic Approach to Supporting Patients with Fibromyalgia & Chronic Pain. 3 hours.
• Cancer Support and Prevention. 12 hours.
• A Wholistic Approach to Supporting Patients with Allergies. 4 hours.
More Clinical Topics

Endocrine Focus

• Detoxification & Liver Support for Estrogen Balance. 4 hours.
• Optimal Reproductive Health for Men and Women. 4 hours.
• The Triad of Endocrine Health: Essential Support for Hormonal Wellness. 3 hours.
• Supporting Female Endocrine Health. 8 hours.
• The Ultimate Thyroid Seminar! 4 hours.
• The Ultimate Adrenal Seminar! 4 hours.
• A Wholistic Approach to Optimizing Glycemic Control. 4 hours.

Other Topics

• Nutrition for Health through All Phases of Life. 12 hours. *New Major Topic for 2012*
• A Wholistic Approach to Purification and Lasting Weight Loss. 8 hours.
• Clinical Application of Laboratory Analysis: Blood, Urine & Hair. 12 hours.
• Nutrition for the Seasons. 4 hours.
• Chinese Medicine Energetics of Whole Food Supplements. 3 hours.
• Gluten Sensitivity and SP Whole-Food Supplements. 3 hours.
• Nourishing the Future: A Wholistic Approach to Supporting Children’s Health. 3 hours.
• Clinical Application of Tissue Mineral Analysis. 4 hours.
• Vaccination Alternatives and Effective Immune Support. 12 hours.
• Essentials of Cellular Rejuvenation. 4 hours.
• Chinese Medicine Energetics of Whole Food Supplements. 2 hours.
• Nutrition with the Seasons. 2 hours.
• Gluten Sensitivity and SP Whole-Food Supplements. 2 hours.
• Nourishing the Future: A Wholistic Approach to Improving Children’s Health. 8 hours.
• Everyone Poops! A Wholistic Approach to Optimal Elimination. 3 hours.
• Gallstones & Optimizing Liver/Gallbladder Health. 4 hours.
• A Wholistic Approach to Effective Immune Support. 4 hours.
• Metabolic Radiology: Dietary Impact on Medical Imaging (with Mark Berger, MD). 4 hours.
• A Wholistic Approach to Promoting Respiratory Health. 4 hours.
• Soft Tissue Injury: Optimizing Soft Tissue Health & Repair. 4 hours.
• Insulin resistance & Metabolic Syndrome: The Key Therapeutic Target. 8 hours.
Business Topics: Love, Serve & Succeed
Patient Communication, Office Systems and Effective Marketing for Practice Success
Since January 1996

In this nationally-acclaimed program, participants learn the fundamentals of effective & ethical business management based in self-cultivation. A series of seven standalone seminars address all aspects of creating & sustaining a successful private practice from a place of self-awareness, integrity & world service. Program modules progress sequentially from awakening to the largeness of one’s own being, to the process of setting up your practice, to attracting new patients & walking them through a process of healing to long-term wellness care, to the ethical issues which invariably arise in practice.

The Seven Modules of Love, Serve and Succeed®

Module One: Self-Awareness & the Healing Relationship. 8 hours.
• The Essential Foundation for Life and Business Success
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Module Two: Starting Up Right. 8 hours.
• Preparing to Create a Strong Practice

Module Three: Legal Issues and Asset Protection. 8 hours.
• Essential Tools to Protect Your Practice and Other Assets from Litigation, and Minimize Taxes

Module Four: Effective Marketing on a Shoestring. 8 hours.
• What Works and Doesn’t Cost a Lot

Module Five: Growing a Thriving Practice (without insurance). 8 hours.
• How to Run and Expand Your Clinic
• Outstanding Patient Care for Superb Clinical and Business Results

Module Six: Building and Preserving Wealth. 4 hours.
• The Financial Secrets of the Wealthy
• Becoming Financially Savvy, and Getting Out of Your Own Way

Module Seven: Integrity in the Healing Relationship. 4 hours.
• Ethics and Spiritual Psychology for Health Professionals

Special Topics:
• Creating a Successful Natural Medicine Practice: Systems for Success. 4 hours.
• How to Buy or Sell a Healthcare Practice. 2 hours.
PARTICIPANT FEEDBACK

Seminar Title: ____________________________________________________________

Date: ________________ Location: __________________________________________

1. What worked? What did you like about the seminar?

2. What would you like to see change? How can we improve the seminar?

Can we use your comments in our publications? Yes_______ No_______

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