Success Guide

What you need to get started

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AOMA Graduate School of Integrative Medicine DAcOM QIP 2017
Overview

What to Expect

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Summary

The AOM programs in the US provide a solid education focused on the actual practice of Chinese medicine and acupuncture. There is however, very little provided to students on how to actually be successful in the field once they graduate. There is much frustration surrounding this and unfortunately, many talented practitioners do not realize they are having problems until their businesses are struggling. There are minimal requirements with regard to practice management for AOM schools and most students prefer not to pay for extracurricular classes, so this problem perpetuates. The goal is to provide a valuable resource which can help address this gap.

Needs Analysis

The needs analysis include the following: casual conversation with recent graduates, a formal survey through REDCAP, various articles and completed studies. One recent popularized study is the data presented in the US Department of Education report which indicates that the majority of the AOM schools in the US are failing due to the income to loan ratios during the first 3 years after graduation. Although the federal study has numerous flaws in assumptions, comparing graduate professional degrees with other kinds of undergraduate and graduate degrees, there is indeed a need for graduates in the business arena.

Purpose

This document is focused on creating best practice guidelines for new graduates of Acupuncture and Oriental Medicine (AOM) programs. These guidelines will include, but are not limited to, steps for successfully starting a new business, strategies for establishing an effective marketing plan, and tools to aid in assessing progress of practice development. These may also be useful for joining an established practice where you are expected to cultivate clients and help expand the practice.

Special points of interest:

- There is an Interviewing Guide in the addendum for those of you who are intending to be employed rather than run your own business. Additionally, those of you hoping to hire employees may want to review this guide as well as there are many important considerations for an employee that may be useful.
Summary of formal REDCAP survey

Most responses to our REDCAP survey were submitted by people who are currently struggling with their individual acupuncture practice. The top three challenges expressed are:

1. Lack of preparation through AOM education and/or no marketing/business background from other areas of life.
2. Money and time constraints.
3. Not knowing where to start or how to get patients in the door.

One survey participant responded positively concerning their practice (i.e. seeing a financially successful number of patients, having a solid marketing plan, etc.). This participant has a business and marketing background from other education.

*While our survey was anonymous, the participants that chose to respond are skewed in the direction of unsuccessful acupuncture businesses. Had we been able to receive an equal number of “unsuccessful” and “successful” participants we would have a better understanding of what makes certain acupuncture practices successful. Despite this bias, we have a clear picture of what pertinent information is missing for the “unsuccessful” acupuncture business population: business skills and marketing skills.

The results of the AOMA Alumni Survey 2017 are very similar to our REDCAP results and confirm that graduating AOM students do not feel prepared by their school to start a successful acupuncture business and they feel finances are a barrier to starting a successful acupuncture practice.

Target Audience

The target audience is students in their last year of AOM school or the first 2 years of practice.

Description of Intervention

We have created best practice guidelines for new graduates of acupuncture and oriental medicine programs. These guidelines include, but are not limited to, steps to successfully start a business, strategies for establishing an effective marketing plan, and tools to aid in assessing progress of practice development. It is in a pdf or a similar format to encourage ease of distribution.

Disclosures

Both of the authors are currently enrolled in the DAcOM program at AOMA and run their own private practices. There are no conflicts of interest noted.
Final Thoughts

This document is intended as a guide. It is not all inclusive of the subject matter. Instead our purpose is to offer pertinent, streamlined information regarding how to establish a successful acupuncture business. There are numerous sources available via websites, books, and classes which offer more detailed information. We have attempted to give you, the reader and entrepreneur, a springboard on which to begin. The rest is up to you!

References

- University of Chicago Medicine Leadership & Interviewing Committee (Colleen Teska).
- Stefanie Dwyer: hiring and firing expert.
Business Nuts & Bolts

The Basics
You have just graduated, or are about to, and you know you want to get going quickly, but are not quite sure how to do that. This section will cover some basic information regarding what items you want to have in place as you open up a practice of your own. Many of these things will be important whether you intend to rent a room or are a 1099 employee for someone. Many will also apply if you are an actual W2 employee, although much of it should be covered by your employer.

- **State specific licensing** - check with your state to ensure you have completed or are on track to complete the appropriate requirements for the state you intend to practice

- **Professional Liability Insurance** - if you intend to work with insurance, you will be required to have this. Some states also require it. Below are several carriers to consider. You may also want to work with a Property and Casualty agent (ideally a brokerage that can work with many carriers) to help you narrow it down.
  - CM&F.
  - AAC.
  - MIEC.
  - Hiscox.
  - Medical Protective company/MedPro.
  - HPSO.

- **HIPAA Compliant email** - this may be built into your Electronic records system, but if not, you will want to come up with an option. There are several, but one popular one is Google business.

- **Clinic Supplies/Suppliers** - Get set up with suppliers for needles and so forth. You will also need to consider how you are handling herbs. You can have some in clinic or you could utilize an online pharmacy like Crane Herbs. You should consider the ethical ramifications of making something work that is not quite right vs the increased cost of the drop ship to patients directly. Also, will you carry formulas for an immediate need (it will change if not handled within 2 days before a drop-ship will arrive)? Do you want topicals and other retail supplies? What items must have sales tax collected where you are located (see sales tax permit below)?

- **Sales Tax Permit** - each state and municipality has slightly different rules about what is taxed or not. Be clear on this before you start selling products. For most states this will be with the State Comptroller's office.
• **EHR/Filing system** - If you choose to use paper (you certainly can) a locking file cabinet or room would be appropriate. If not, you can go electronic. Ultimately we will be required to have electronic records so looking now is not a bad idea. There are many out there, none of which are perfect. Evaluate several to determine which have the features you personally want. Some things to consider are listed below.
  
  - HIPAA compliant.
  - Portability: cloud vs desktop.
  - Devices availability.
  - Acupuncture specific or other modalities included.
  - Ability to expand/grow with clinic.
  - Back up capacity and requirements.
  - Transferability and format: pdf vs excel.
  - Data slice and dice.
  - Inventory management.
  - Billing.
  - Super bill/1500.
  - Integration with insurance.
  - Credit card integration.
  - Room management/calendar.
  - Client portal.
  - Online scheduler.
  - ICD 10 information.
  - SOAP notes.
  - Other bells and whistles.
  - Do they sell the data?
  - Customer service.

• **Business License/Permit** - some localities have additional requirements before you can open a business. Confirm this first before you sign a lease. You do not want to get stuck in a lease and find out you cannot actually open.

• **Business Name** - ask around, get opinions before you commit. Consider your audience when deciding.

• **Business Structure** - talk to a tax person
  - Sole Proprietor.
  - Partnership.
  - S Corp.
  - LLC/PLLC.
  - C Corp.
• **Location/Space**
  - Lease agreement.
  - Actual cost.
  - Demographics.
  - Who is responsible for what? (broken HVAC, roof leak, property taxes).
  - Preparing for growth.
  - What are your needs? Does it fit your needs?
  - ADA accessible.
  - Water? Bathroom(s), kitchen, separate sink for hands and cup cleaning, laundry.
  - Signage.
  - Can you sublet if necessary?
  - Need vs. want.
  - Zoned for medical - if out of your house, need to look at this as well. HOA restrictions may also come into play.
  - Moxa/fire cupping concerns?

• **Client Paperwork** - you will need basics:
  - Intake - see state requirements on paperwork.
  - HIPAA.
  - Privacy policy info.
  - Any state specific items (In TX: Notification Form Regarding Evaluation by Physician).
  - Written cancellation policy.
  - Informed consent.
  - Arbitration/Mediation Agreement.
  - Cosmetic acupuncture release form.
  - Children release by parent.
  - Child missed school form.
  - Accident form.
  - Billing history.
  - Referral forms.
  - Anything else that makes sense.

• **Scheduling** - there are lots of online scheduling options available. Find one with the capacity to handle your intended booking schedule. Think about multiple rooms, overlaps, reminders, different length appointments, blocking out times and ability to modify by patients. There are lots of features, so you may run across some you are excited about. One thing very important here is to be sure you have the capability to block times so it does not look like you are wide open. This can deter patients because of their impression about your abilities (the perception that a busy provider must be good and a not so busy provider...well, you get the picture).
• **Phone System** - How do you ensure someone answers the phone? If you don’t they will go somewhere else. You should also consider whether you want your personal number out there or a separate business line. We suggest a separate business line. There are quite a few services that will forward to a cell phone so you can make sure you are available. Can it grow with you once you are ready for a real phone or is it easy to transfer the number? You don’t want to get your business going and then be forced into changing phone numbers.

• **Budgeting and Accounting Software** - One of the most important aspects of owning a business is being very familiar with the numbers. You can absolutely manage this on an excel spreadsheet, however there are many high quality programs out there today which make the slicing and dicing of data much easier. In the beginning you will need to guestimate your expenses. This is true whether you are employed or running your own practice. If you are employed it will help you determine if the offer you got is a fair one. If you are running your own practice you can back into how many patients you need each week and therefore how much more hustling you need. You will need a Profit and Loss statement for your taxes and an Income Statement. You can track how various marketing arms are doing and the value of a patient in terms of referrals and so forth. In order to sustain and ultimately grow, this is all critical information. If you simply loathe doing this, you can hire it out, but it must get done. There is no way around it.

• **EIN** - This is not mandatory for certain business structures but often banks will require it to set up a business account. You can order one yourself from the IRS website. It is free.

• **Laundry Management** - who does it? Should you wash clinic sheets in your personal machine? Do you even want to? What if there is blood? Then what? It is a biohazard by definition which requires different standards. Confirm with your state.

• **Internet/Utilities** - Do you need them? Are they part of your lease? Who’s responsible for what? How about repairs? Be clear so you can budget accordingly.

• **Complaint Poster** - Specific to each state. Your state board should have the information available if you are required to have this and the required formatting.

• **General Liability** - Again this is not a requirement in general, but may be required by your lease. This is commonly known as Trip and Fall Insurance and is part of your entire risk management package. As you accumulate more assets, this becomes more and more important. A good Property & Casualty broker can help you with this.

• **Business Insurance** - Similar to renter’s insurance, covers your property within the rental in case of fire or other damage or losses.

• **Staffing Needs** - Do you want staff in the beginning? If not, you get to wear all the hats. If so, talk to your accountant and get some good help to ensure you have all the legalities of staff covered. You’ll need monies available up front for this. Consider a front desk person who is also marketing savvy or loves social media! You might be able to work a trade or get a student to volunteer as well.

• **Banking** - get it done- that is all (see the “Getting Paid” section).
• **Cleaning Clinic** - who does it? Can you handle biohazards? (get bags in case) Also, be sure to follow CNT for cleaning cups and guasha items.

• **Sharps and biohazards** - We are a medical facility so you will need to figure out what to do with your sharps and biohazard waste. Google this online. There are lots of options. **NOTE:** Some states have laws about documenting how you disposed of your sharps. Check this as fines can be steep.

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Not all of these are mandatory to get up and running, however all are worth considering before you hang your shingle. In some cases, it is simply for ease sake and in others, there are legal ramifications of not doing it properly. Good luck.
Getting Clients

Tell your story!
Introduction

Now you have the basics of the business in mind, but you are missing the most important piece: The customer. Before we get into that discussion we need to establish a few definitions.

Marketing is the process of letting people know you are out there and can solve their problem. Sales is the agreement made once you have established that you can solve the customer’s problem.

Notice that sales is NOT defined as making someone buy something or some other nefarious process. Sales is simple: Figure out what their problem is and determine if you have the tools to treat it. If you do, you have a sale. If you don’t, you have a referral and very possibly a referral source down the road. You do this every day in clinic anyhow. Now you just need to do this with strangers. The difference is that the sale is setting an appointment instead of convincing them that the technique you chose is the right option.

So how exactly are you supposed to go about doing this? Think of who you personally actually buy from: People that you Know, Like and Trust (K/L/T). This happens best as a natural progression, not a forced interaction. This means actually carrying on a conversation and being interested in what they have to say. Listening is critical; not talking, but listening. If you are an introvert, you know how to do this already. The extroverts in the crowd may need to practice keeping their mouth shut and ensuring the conversation is about whomever they are listening to. This concept is important to keep in mind when you are developing a marketing plan. You must focus on the customer, not on yourself. If your response to all of this is that you don’t like sales, shame on you! You have a marvelous toolkit that can solve so many people’s problems and help them and yet because you have issues with sales you won’t talk about it. For you to be successful, it is critically important for you to wrap your head around this. If you are struggling with this, you should think very critically about it and consider some sales training as well.

Basics of a Marketing Plan

The first step in developing a marketing plan is to figure out who your target audience is. Now I know many of you want to treat everyone and do not want to specialize...and this is ok. The catch is that it is darn hard to structure marketing around and even more difficult to help people understand that you can solve THEIR problem. You simply are casting too broad a net. Think about it this way: is it easier for you to narrow down where to go to lunch with a friend if the friend has some idea of the type of food they want or if they say “whatever?” Typically it is easier if they have some idea - if there are some parameters in place as to the type of food desired.
The same comes into play when you are trying to help people understand what you do. They have to make a connection. This rarely happens when you describe what you do by the modalities you use. For example, telling someone you do acupuncture, guasha, tuina, cupping blah blah blah...means little to nothing to most people. If anything, they are scared of the needles and don’t want “bruises.” Instead, if you tell them you help people get rid of pain or ease stress, or get rid of PMS. That verbiage they get. If they need help with those things, the next natural question they have is “How do you do that?” which opens up a natural conversation and allows you to work toward securing an appointment. The previous example is focused on one-to-one interactions, but the same applies to print or online marketing. If it is too broad, people do not connect your solution with their problem. You lead them to see you have their solution with specific, emotionally charged examples.

Let’s think on this for a moment. Which is more compelling: a person with dull, achy low back pain every day or the person who is unable to play with their kids or grand-kids because of the back pain they have? Hopefully you can see it is the second person. The back pain is not particularly impacting the first person, so they have not yet seen a need to resolve their problem. The second person, on the other hand, definitely has a need. That is the person you can connect with the quickest.

That is how you target your marketing and your conversation. Present the person with the image of what could be for them, should they no longer have pain, or IBS, or whatever it is you are treating. People buy on emotion and then come up with the logic to justify their decision later to their friends and family. Therefore your marketing should include information which tugs at the heart strings.

The Marketing Cycle

The other piece of information you should be aware of is the actual marketing cycle. Very few people will actually buy something the very first time it is introduced. Therefore, it behooves you to stay in touch with them. According to Sales Force, it takes an average of 6-8 touches before someone is even a viable lead, then another 6-8 before they actually buy. (1) This means you must stay in touch with them over a long period of time. You also cannot expect one FaceBook ad or a booth contact to get them committed unless they are already moving along the marketing cycle. This is why it is called “Drip” marketing - you need to keep dripping on someone before they actually remember you.

The only way to move someone along this cycle is to have prior exposure. This is actually one of the reasons that cluster studies repeatedly demonstrate that when you have a high concentration of one type of business in an area, all of them do better than if they were not close to each other. Hence the gas stations on opposing corners, or the 3 coffee shops within a block of each other. When each business does their own marketing, the others benefit as well due to more exposure and familiarity in the mind of the consumer.

Refer to the charts on the next page.

(1) https://www.salesforce.com/blog/2015/04/takes-6-8-touches-generate-viable-sales-lead-heres-why-gp.html
The Buying Cycle

SALES FUNNEL

Unaware

What is it? Who are you?

Who needs it and why?

What are the consequences of not having it?

Looking For Solution

Why should I choose you?

INTEREST ESTABLISHED

Educational

eBook (or buyers guide), Web Portal, Analyst Papers, Blogs, Independent Articles, Industry White Papers, Webinars, Events

Validation

Webinars, Podcasts, Seminars, Multimedia, 10 Reasons, Trials, Customer References, Demos

SALES

Presentations, Topic Sheets, Product White Papers, Customer Stories, Competitive Intelligence

Problem Acknowledged

OFFERS FOR EACH STAGE OF THE BUYING PROCESS

AWARENESS STAGE

- Blog posts
- Email newsletter
- Introductory whitepaper
- Tip sheet
- Checklist
- Introductory ebook
- Subject kit
- How-to video
- Educational webinar
- Infographic
- Slide show
- Educational podcast
- Guide or tutorial
- Resource round up
- Glossary
- Data visualization
- Interview
- Template

EVALUATION STAGE

- Customer testimonials
- Advanced eBook
- Catalogue
- Case study
- Free sample
- Demo video
- Product or solution focused whitepaper
- Product spec sheet
- Frequently Asked Questions page
- Product or solution focused webinar

PURCHASE STAGE

- Free consultation
- Pricing page
- Live demo
- Free trial
- Estimate or quote
- Coupon

TOP OF THE FUNNEL

MIDDLE OF THE FUNNEL

BOTTOM OF THE FUNNEL

Credit to Annzo Corporation SEO Company, Canada

Credit to Powered by Search
The Marketing Cycle cont....

These charts each address the various sales stages. As you can see, the customer moves along them and makes various decisions about the product or service you offer and then about your ability to solve their actual problem. There are different strategies to employ along the funnel, each addressing a different phase of the process.

Develop the Plan

So now that you have a basic understanding of the why, on to the how. One of the easiest ways to go about this is to establish 4 primary topics you want to focus on. Then break those topics up into subtopics - again come up with 4. Now you have basically 16 topics you can rotate between weekly or every other week. You can utilize these for just about any type of marketing you can think of---from FaceBook ads to talks. Keep in mind the client focus. It is useful to layer as well. For example, you might use the same topic as the blog post the week you use it for social media and as a client education handout. This can increase awareness and promote consistency.

Some Other Things to Consider

- You must have a website. There is no way around this. Clients must be able to locate you. Additionally, it is a great place to house some of the critical information people need in order to choose you at the end of the evaluation process (testimonials, blog posts etc).
- Be sure to include an actionable step on all marketing material. At a minimum, ask for them to join your newsletter list. There are lots of free mail lists such as Constant Contact or Mail Chimp to utilize.
- Start a few months out from when you plan to open your doors. Get the excitement flowing. You do not have to wait to be all set up. If you wait, this is a sure fire way to have no customers the first week or month or two. Remember it will take them about 10 touches to make a decision anyhow. Get rolling!
- Be sure your website can be found: Learn about search engine optimization (SEO) and do it. Verify your business with Google. Make sure it shows up on Google maps. Every time you post somewhere, cross link to your website. You need 5 Google testimonials to start showing up in searches at any reasonable level.
- Speaking of which - get those testimonials. The best time to ask is when a patient is gushing over how much you helped them. They are happy to spread the word at that point. Remind them of how helpful it is for you should they chose to do so. Make it easy and have a small card with explicit instructions on how to do this (Google,

“"The difference between a successful person and others is not a lack of strength, not a lack of knowledge, but rather a lack of will.” – Vince Lombardi

Facebook, Yelp, website... wherever you are live). Also a great time to ask for referrals.
- More than one strategy can help, but you really need to track each one so you know what is not working and what is working. Be sure to actually target and not pull the old “throw the spaghetti on the wall trick and see what sticks.”
- In our business Face to Face is by far the best. People are very unfamiliar with what we do so it is best to actually talk to them. The top 3 ways to do this are: Booths, Talks, Networking.
Face to Face

So now let’s talk about Face to Face. Many of us are not fans of talking to people, however it is important that we are able to convey a succinct message about who we are and what we are able to help with. If we are not able to do this, we will not have customers. If you are uncomfortable speaking with people or have trouble coming up with answers quickly off the cuff, our the best advice is to join a local Toastmasters group. This will be the best investment you can do and even better, they will encourage you to speak about what you do. They will also be an engaged audience so you can get some confidence in both speaking and answering questions off the cuff.

If you are planning to do talks, great! A few pointers though:

- Target, target, target.
- Start with the emotion, not your name.
- Weave in true stories about successes.
- Open up your heart a little so the audience can hear your passion and get to know you—they need to know that you “get” them (remember K/L/T factor).
- Let them know early that at the end you will be showing them how to take the next step. This might be to sign up for a newsletter or a free/paid consultation. Then at the end, make the offer.
- Don’t give away too much in the speech. You want them to feel like it was valuable, but not so valuable that they do not need YOU. Instead they should want more information when you are done.
- Be sure to collect emails for newsletter.
- Avoid questions—they break up the flow and when a question does not apply to people in the audience they begin to lose interest and then their minds wander off and you have lost them. You can be available at the back for one on one afterwards.
- SMILE!
- Follow up with everyone within 2 days.

Next: the Booths.

- Target—again—only pick booths with your target client in attendance.
- Position yourself so that the table is NOT between you and the people in attendance. After all you want to be approachable.
- You need something to get their attention. People will only stop in if something catches their eye. My favorite is a giant tongue, and a mirror or 2.
- Have a way to collect emails again.
- If you have educational materials, don’t plan to give it all away. Instead only have a few to review there and ask for their email to send it to them after. Then send it to them.
- SMILE!
- Follow up with everyone you met.
Finally, let’s chat about our dreaded Networking events. There are lots of the out there. The most effective will likely be the ones that have either your target audience in attendance or people who know your target audience. Either one can be very fruitful.

- Target-again.
- Before you decide to go, what is the club’s focus? For example, there are some clubs (BNI, BoB) where they limit how many members of any one profession. There are others that are a free for all. Each has different benefits, but both require planning on your part. Don’t just show up.
- Arrive slightly early---it is easier to get into a group this way.
- Dress professionally.
- SMILE!
- Don’t be afraid to be enthusiastic about what you do, but it is about THEM not you. Remember your goal is to get their info so you can follow up with them. If you have a genuine interest in them, they will naturally be curious about you as well.
- When you introduce yourself, this is a great time to bring up what you treat, not how- keep the emotional component (think back pain severe enough they cannot pick up their kids).
- The goal is to develop a relationship with the person and get their contact information to add them to your drip email list. If you determine they do have a problem you can solve, ask permission to give them some brief information on how you might solve it. Don’t make assumptions. They may not care.
- Follow up with everyone you met.
- Not everyone will have an immediate interest. This is ok and natural. Keep at it and get contact info to start dripping on them.

Medical Professionals

One last group you may want to consider introducing yourself to: other healthcare providers. They can be a great source of referrals, but remember you will need to prove yourself to them in order for them to start referring over. There are a few ways to do this.

- Drop a note to your patients’ medical providers to introduce yourself. They have to keep those in the patient file which means they will see it each time they go to the file.
- When you meet another medical provider, find out what problem they are having trouble with in their practice. Can you solve it? For example, surgeons struggle with folks who have issues with pain medications. We can help.
- Follow up, Follow up, Follow up. We cannot emphasize this enough. You must follow up.
Final thoughts

We have listed below some ideas to get you started.

- Introduce yourself to all the local businesses. Do this more than once until they get familiar with your name and face.
- Go to local community events.
- Volunteer for a group you are passionate about.
- Donate services or time.
- Set up a FaceBook business page (you must have a personal page to do this) and start posting (or pick another social media you are thrilled about).
- Get your website up and running.
- Start blogging.
- Offer to write articles for others.
- Submit events to local newspapers.
- Prepare a press release for your local paper.

Marketing is one of those things we never thought we would be doing when we first went to school. Fortunately there are tons and tons of great resources out there. If you remember to focus on the problem you are solving, not only will you be able to help lots of people, but you will feel good doing it and people will be grateful you brought it up. Do not be selfish because you are scared! Push your limits and become great at helping solve people's problems. They will love you for it. If you work as hard at building your business and marketing as you did in school and preparing for boards, you will be surprised at the success you will have.
Keeping Clients

After the Sale
Ideas

- Take good notes on personal events and names etc. of your patients’ interests etc. this way you can refer to them in conversation. Staff can do the same. It will make the patient feel like you care about them on a personal level. Keep this info with your chart in an easy to locate place.
- Be on time. Open minimally 15 minutes before the first scheduled appointment. If you are not early, you are late. You expect your patients to be respectful of your time. You should extend the same courtesy to them.
- Follow up phone call/email after the first treatment or the first time they take herbs or you change a formula.
- Reach out to patients who have not been in to see you in a few months--just to touch base. You may find out they are better--you can get a testimonial or a referral at that point.
- Keep the office clean. Avoid lingering smells. Try for soothing colors--generally make it a pleasant place to be (within your budget--this can develop as you expand).
- Be sure to greet them with a smile--over the phone too.
- Respond promptly (within 24 hours).

- If you have committed to something, follow through. If you still are not done with it, reach out to let them know, then finish it up.
- Take responsibility for any mistakes you make; work to resolve any confusion quickly. This can often turn a patient into your biggest advocate.
- Be kind and respectful. Do not disparage their other practitioners or the decisions the patient has made.
- Meet the patient where they are at. If they are not ready to go gluten free, do not harp on them, but let them know you are available to help when they are ready to give it a try.
- Provide additional resources for them on their condition or regarding other questions they had.
- With their permission add them to your newsletter to help educate them further. Check Spam laws about permission.
- Thank them for referrals.
- Follow through on the referrals they give. They will never offer again if you don’t.
- Invite them to like you on social media.

These are just some of the things you can do to keep patients. I am sure there are tons more things you can do as well. Get creative. They do not need to cost anything at all. It is the personal touch that matters.

(1) https://www.linkedin.com/pulse/what-cost-customer-acquisition-vs-retention-ian-kingwill
Getting Paid

What to Expect
You love what you do, but how do you get paid? Where does the money go? How are you going to track your income and expenses? There are different forms of payment: cash, check, credit card, insurance reimbursement. Here is our go-to guide for getting paid and keeping track of your income. Yes, keeping track of your income (and expenses) is very important, especially come tax time. And YES, you deserve to get paid for what you do. Think of it as the Qi that runs your business. Without it, the business dies and you can no longer help anyone. If you are having trouble wrapping your mind around this concept, you should examine your deep rooted feelings about money. Do you have a scarcity mentality or an abundance one? You need an abundance one to succeed. Think on it.

**Step by Step**

- Create an account and register at the National Plan & Provider Enumeration System (NPPES). This will get you your National Provider Identifier (NPI).
  - An NPI is a unique 10-digit identification number issued to health care providers in the United States by the Centers for Medicare and Medicaid Services (CMS).

- Register for your Sales Tax Permit.
  - Depending on your state requirements, you may need a sales tax permit to sell herbs and/or other non-herbal products.
  - Handy blog with how-to sales tax permit per state: https://blog.taxjar.com/how-to-register-for-sales-tax-permits/

- Register for your Employer Identification Number (EIN - also known as your Federal Tax Identification Number) through the IRS.
  - Identifies your business entity.
  - Most businesses require this, but check with your state requirements.

- Banking - getting a business checking account.
  - Basic business bank account requirements:
    - Doing-Business-As (DBA) - usually name of your business.
    - EIN (see above).
    - Valid government issued ID.
  - Primary savings account (really great idea to escrow taxes or prepaid package money).
  - Depending on your business structure (sole proprietorship, LLC, etc) you may need other information, such as a partnership agreement, etc. Each bank will tell you their specific requirements.
  - Credit Union vs. Bank: do your research!
Decide if you are going to accept insurance or not:

- **Pros:**
  - Free advertising for your business.
  - Patients may come more frequently (typically 12-15 treatments covered per year).
  - More affordable for patients.
  - Patient who might not normally try acupuncture might because their insurance covers it.
  - Potential for higher volume of patients.
  - Can charge for the office visit extensive intake (E&M CPT codes for evaluation and management).

- **Cons:**
  - Time spent dealing with insurance companies.
  - Billing process may take more of your time, than cash patients.
  - Delayed payment.
  - Compensation may vary, possibly less per service.
  - Some services not covered with insurance (manual therapies such as cupping, tuina, guasha).
  - Insurance does not cover all chief complaints.

- **What you need to become a credentialed insurance provider:**
  - State License Number (i.e. LAc, OMD).
  - National Provider Number (NPI).
  - Tax Id Number (EIN).
  - Social Security Number (SSN).
  - Fax line number.

- **Decide which companies you want to become credentialed with:**
  - Ask other providers in your area who they have had better experiences with.
  - Ask current patients what insurance they have, even if their insurance does not cover acupuncture, it may in the future.
  - Pick a good number of companies to start with, as you might not get them all. Three to Five insurance companies is great start.
  - Find out which insurance companies cover which chief complaints.
    - Coverage varies from company to company so do your research.
    - Pain is often the primary chief complaint.
  - Fill out the application in its entirety (Texas has a standard 20 page application). Some companies have online versions. There is a lot of repetition so keep your information and good notes.
Then wait:

- It can take up to 6 months to get credentialed with some insurance companies.
- After you have submitted your application and any documents they need, wait 2 weeks and call to check to see if there are any documents pending with your file.
- Once you get the “Yes we have everything that we need”, starts the second waiting game.
- Wait about 4 weeks before calling again to check the status of your application.
- Your file should move from the “credentialing and approval” phase, to the “contracting phase.”

The contract:

- Look over the terms very carefully-you will be held to it.
- Have your legal representation look over the documents as well.
- Review the terms and length of your contract.
- Check the contracted rate for in-network vs out-of-network, length of time before you get paid, and instructions for disputing or filing an appeal for a claim.
- If you don't agree with any of the terms, DO NOT SIGN-You WILL be held to it.
- You can always try and negotiate different terms or a higher contracted rate. BUT there is no guarantee that they will change anything.

How to handle insurance clients and associated paperwork.

- Find a company that can handle the billing for you will save you time! Allows you to make more money!
- Local Options:
  - Storm Medical Billing.
  - Texas Professional Medical Billers.
  - Puredi (*Manages all of your billing & re-credentialing needs*).

A few insurance companies to consider:

- Triwest.
- Blue Cross Blue Shield.
- United Health Care.
- Aetna.
- Kaiser Permanente.
- Humana.

- Periodic re-certification can be as frequent as every 6 months per insurance company.
Credit Cards

- Credit Card Payments:
  - Important to be able to accept credit cards for patient satisfaction - credit and debit.
  - Compare pros and cons of having a credit card reader through your bank (typically higher cost until your gross income is high enough) vs. other options.
  - Consider processing % and other fees.
  - Cost of equipment.
  - Any fraud coverage available.
  - What credit cards are accepted -- for example, not all accept American Express.

- Possible solutions:
  - Square.
  - Paypal.
  - EMS.
  - Stripe.
  - Venmo.
  - Private bank or credit union.

NOTE: You will also want to ensure that the company allows for Health Savings Account (HSA) card use. Typically you will need to ensure you are set up as medical for this to work properly.

Money is only a tool. It will take you wherever you wish, but it will not replace you as the driver. -- Ayn Rand

Opportunity is missed by most people because it is dressed in overalls and looks like work. -- Thomas Edison
Products & Services

What to Expect
Another “product” to consider is patient education. What topics do you want to educate your patients? Are there protocols you will be prescribing for your patients? Consider having handouts or information sheets explaining certain treatments or modalities such as ear seeds/tacks or what to expect from cupping/post cupping instructions. You can make your own and print yourself or have printed by a company such as Vistaprint. Certain companies, such as Acu Media Works, have prepared patient education for purchase.

Does your list of services include labs? If so, are you purchasing kits from the company or having the patients purchase the kits? Do you have paperwork to request blood work? If you are going to request blood work consider establishing a professional relationship with a local lab company so you have a consistent place to refer your patients. There are many online lab companies to consider depending on your requirements are, these include, but are not limited to Xymogen, ZRT Labs, Genova Diagnostics, and Analytic Research Labs.

Herbs can be a challenge. You can spend a lot of money on formulas and singles that don’t sell. You may also be in a situation where a patient needs a formula and what you have on hand is not quite the right one. Then you must decide if ethically you should make do or provide a better solution. One way to handle this is to utilize a local herbal pharmacy. Another is to utilize an online herbal pharmacy. The benefit of the online version is that you will actually get paid for the time effort and knowledge base you have put into the formula. Starting small and building your herbal pharmacy as your patient numbers grow is also an option. This allows you time to see what your patient population typically requires herbally.

Crane Herbs* is an online pharmacy to order patents, customized powdered formulas and standard formulas. Your prescription is picked up online by the patient and sent directly to the patient’s house. There are many other options to purchase herb singles, formulas, and patents. Many also offer drop shipping as well. Popular companies you should consider researching include: Golden Flower, Golden Needle*, Qualiherbs, Evergreen, Kan, Kamwo*, Mayway*, and Red Pine Chinese Herbs*.
General Resources

Time to Get Busy!
Increasing Your Sales and Marketing Savvy

As a business owner, over time you will create your own resource list. These are resources we gathered during school in preparation of opening our practice and during our first six months of practice. We figured we would share it with you, because why start from scratch? We are not including websites as they change often, but google is forever...

These are general resources to help with creating, building, and establishing an acupuncture business. For the most part the name says it all. Neither author of this document has a financial interest or claim on the following resources. These resources were collected at one stage or another during our business building process. This list is in no way comprehensive, it is meant to give you a starting off point to make your own list. Listed in alphabetic order:

- 6-Figure Acupuncture.
- Acupuncture Business Success.
- Acupuncturists on Fire.
- Chen-Yen for Introverts.
- *Emotional Intelligence* (the key to personal and professional success; website and book) by Daniel Goleman.
- Facebook Groups:
  - Chinese Medicine that Works.
  - Chinese Medicine Practice Management.
  - Electroacupuncture.
- *Insights for Acupuncturists* (information and resources ranging from thinking about a career to professionals in the field).
- Making the Maven (coaching for healers, providing support, creating a successful business structure while focusing on your must-do practices).
- Modern Acupuncture Marketing (online courses and free downloads).
- Patti Lund Story (Dr. Patti Lund is doing so many outrageous things in his practice and his success defies all conventional business paradigms).
- *QBQ! The Question behind the Question*: Practicing Accountability at Work and In Life by John G. Miller.
- Score Mentoring (Find a mentor to take your business to the next level).
- Small Business Association.
- Toastmasters - Empowering individuals to become more effective communicators and leaders. Toastmasters provides a supportive and positive learning experience in which members are empowered to develop communication and leadership skills, resulting in greater self-confidence and personal growth.

Great YouTube videos:
- https://youtu.be/H14bBuluwB8
- https://youtu.be/Ks_-Mh1QhMc

Seriously consider these as an integral part of establishing your successful acupuncture business.
Objections!!!!

One of the biggest Obstacles people have is how to address when someone throws an objection at them. One of the easiest things you can do to overcome this is to have planned for them in advance. We all know the most common objections to acupuncture, but have you thought clearly about how to answer these questions? You should also recognize that often these are more your issue than your prospect’s issue. If you hesitate when you address their concerns, you have lost them at that point. Therefore practice your responses. Some common objections we hear are listed below. You should come up with authentic answers to them yourself and remember, more often than not, the real concern is that you are competent and can help fix whatever their problem is. Be honest and genuine. Be confident! Fake it ‘til you make it!

- Does it hurt?
- Does it actually work?
- Well, how does it work?
- I have heard it is not safe.
- It costs too much.
- It will take too long.
- I don’t have time.
- Herbs aren’t safe.
- I don’t want marks.
- I need to talk to my partner.
- I need to talk to my doctor.

And any others you may have run across.
Interviewing Guide-Addendum

Basics

Congratulations! You are ready to enter the work field as an acupuncturist. If you have decided to apply for an established job, as opposed to starting/running your own practice, read on! (This section is also handy to have for when you are ready to interview for your own employees.)

Now, most people are familiar with a general interview format. The interviewing person or committee asks you lots of questions concerning your strengths and weaknesses, past job experiences, what your ideal job is, and what you will bring to the table (why they should hire you).

What Colleen experienced as she interviewed for acupuncture jobs from Montana to Washington D.C. in the spring of 2017, was that many acupuncturists do not know how to interview potential employees. In turn, you end up interviewing the acupuncturist, the company and any other employees of the company. This can be quite a challenge if you’re not prepared!

Interviewing for certain jobs, especially those associated with an established hospital, clinic, or health system and those with experienced HR or practice managers, will be very similar to your “typical” job interview, if you have interviewed in the health field before.

Some Other Things to Consider

A couple things to consider before diving into job hunting and applications:

• Ask yourself...are you really okay with working for someone else? Consider the amount of independence and freedom you want in your future job. Does this fit the job description for which you are interviewing?
• CV/Resume/Cover Letter: no typos, need we say more...
• Remember, despite the fact you are being interviewed for jobs, you are also interviewing your potential employer and the business. Be proactive, ask questions, and be ready to negotiate!

General Acupuncture Job Hunting Resources:

• Major job sites such as www.indeed.com.
• Alumni pages on school websites such as AOMA, Southwest Acupuncture School.
• Websites in the field of acupuncture such as: http://www.acupuncture.com/job_posting/employ.htm

The following is a general list of topics and questions to help you prepare for the big day and to help you eliminate jobs before you get to the interview process. Remember, you decide what you want, what is acceptable to you and you should be prepared to ask for these requirements! You should also consider running a budget as if you were running your own clinic so that you can cross compare costs to enable you to better determine if the offer you are being given is a fair one. For example, we had some situations where the estimates on the cost of malpractice they were offering were significantly higher than the actual cost would be. They used this number in their calculations of what you would need to be making on your own.

Same thing with the number of patients seen each day. If they are expecting you to see 3 patients an hour, what would that be in your own clinic? If you have to get your own patients anyhow, is it worth it to you? There is no right or wrong here, just a way to help you evaluate. If you do not feel that you are being paid enough, remember that you accepted the job with those conditions. Be very clear on what exactly you are accepting prior to signing an acceptance letter.
Questions about the Job Itself

- Type of employment (W2, 1099, Commission, etc).
- Is there an employee review process.
  - How often?
  - Format?
- Wages: salary, hourly, commission, combination (W2 vs 1099).
- Bonus/Profit Sharing opportunity.
- Non-compete clause.
- Benefits (yes, there are acupuncture jobs out there that have benefits!).
- Free or discounted treatments and/or herbs, products for purchase.
- Do they reimburse or pay for the allowed amount for:
  - Paid Time Off (PTO).
  - Health Insurance.
  - Malpractice Insurance.
  - CEU’s.
  - Licensing fees.
- Are you allowed to do community events, lunch/learn, community outreach? Does this conflict with the non-compete clause or is it part of your job description? If so, what is the pay? Community events are a great way for the community to get to know you and make you successful quicker at your new job!

Facility Questions

- # of rooms.
- What is supplied by the company?
- What are you required to purchase or furnish?
- Documentation type.
- Herbal Pharmacy (see below).

Herbal Pharmacy Questions

- Do you have access to an herbal pharmacy?
- Do you want to incorporate herbs in your practice?
- How do you do this if they do not have a pharmacy?
- Who is in charge of stocking?
- Who is in charge of distributing?
- Who decides what products are purchased and stocked?
- Is there a commission for selling herbs or other products?

Patient Questions

- Demographics?
- Typical patient load per week, per day.
- Expectations of patient numbers per day, week, month.
- Who is responsible for bringing in new patients: you, the company?
- Is there a referral (s) source?
- Average number of referrals?
- Do the patients belong to the clinic or may you take them with if you leave?
- What is the established protocol for handling trouble patients?
Most Importantly-Questions About Your Colleagues

- Who is your supervisor:
  - What is the chain of command?
  - Are you part of a department or an independent entity?
- What is the role of the support staff?
  - Are they available to help clean/run rooms?
- Are you required to perform support staff jobs and what are these tasks?
- Who are the other employees and what is their background?
- Format of the clinic: integrative, just acupuncture?
  - If integrative, how do you decide who is the primary provider for the patient?
  - Is it a collaborative environment, do you want a collaborative environment?
  - What is the forum for collaboration?
  - Are there staff meetings to discuss patients, cases?
- Are you replacing someone?
  - If so, how many people have had this position and how long did they stay?
  - Why did they leave?
- How do you handle staff concerns?
  - Is there a protocol in place?
- What is the company’s marketing plan to introduce you as the new acupuncturist to the community?

Finally-Negotiations

First, and most importantly, you must remember your value. If you do not believe you are of value to the company then you will most likely not get a job offer or have room to negotiate a salary. Be informed! Know what you are worth. Do your research on living expenses in the area and pay for similar positions.

- Know what is acceptable (Be sure to have considered this with regards to what it takes to run your own practice and the expected patient load).
  - Pay.
  - Benefits.
  - Responsibilities.
- What you are unwilling to negotiate.
- What is flexible.
- Remember it is okay to ask! If you do not ask, you will never know if you could have gotten more money, benefits, flexible hours, etc. Ask, ask, ask! Be professional and be clear.
EIGHTY PERCENT OF SUCCESS IS SHOWING UP.

Woody Allen
We hope that you are able to utilize the information that we have put together in this book. We love our profession and it saddens us that so many people are struggling to make ends meet. Feel free to shoot us feedback if you have any. We are open to suggestions or criticisms and are happy to share what we are doing.

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“F-E-A-R has two meanings:
‘Forget Everything And Run’ or
‘Face Everything And Rise.’

The choice is yours

-Zig Ziglar