

Origins Incubator

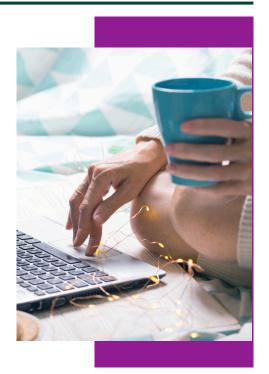
2025 Cohort Syllabus & Comprehensive Curriculum Guide

How it works

Origins Incubator is a 12 month mentorship program created and run by a DO, ND and JD that supports physicians in creating and launching their membership based practice. We exclusively mentor MDs, DOs and NDs. We pride ourselves in being hands on with personalized support - so each cohort is capped at 40 physicians.

There are 3 tracks that run simultaneously: Practice Creation, Clinical & Case Studies, and Legal & Finance. Each track is a self-paced curriculum with prerecorded videos and supporting written materials, checklists, and templates.

Live support includes live 60-90 minute weekly office hours that are recorded, individual mentoring calls, as well as same day live phone & email support with our practice success manager.



Highlights For 2025 Cohort



35 CME credits; AMA PRA 1

Our Clinical Curriculum is CME certified for 35 CME credits.



Expert Guests

We have a stellar line up of experts who will lead workshops in: online ads and virtual marketing, social media creation, gut healing treatments, cardiovascular treatments and more...



Targeted Workshops

In addition to the weekly office hours, you will have the opportunity to attend monthly workshops where we work alongside you to create a foundational part of your practice from start to finish. Think of it as an online study group. Workshops last on average 3 hours.

© ORIGINSINCUBATOR.COM

Every practice is unique.

There is no single or "gold standard" way of creating or growing a practice because you, your patients and your approach are all unique.

However, we have learned through experience and mentoring 100s of physicians that there are basic stages of growth that every single physician must go through in order to grow a healthy, sustainable business. At the Incubator program, we identify your stage, and teach to that stage until it is solid, so you can grow with confidence.

Happy Creating! ~The Incubator Team

To get your personalized Plan, please go to www.originsincubator.com.

STAGES: PRACTICE CREATION

STAGE 1 - Research

STAGE 2 - Act

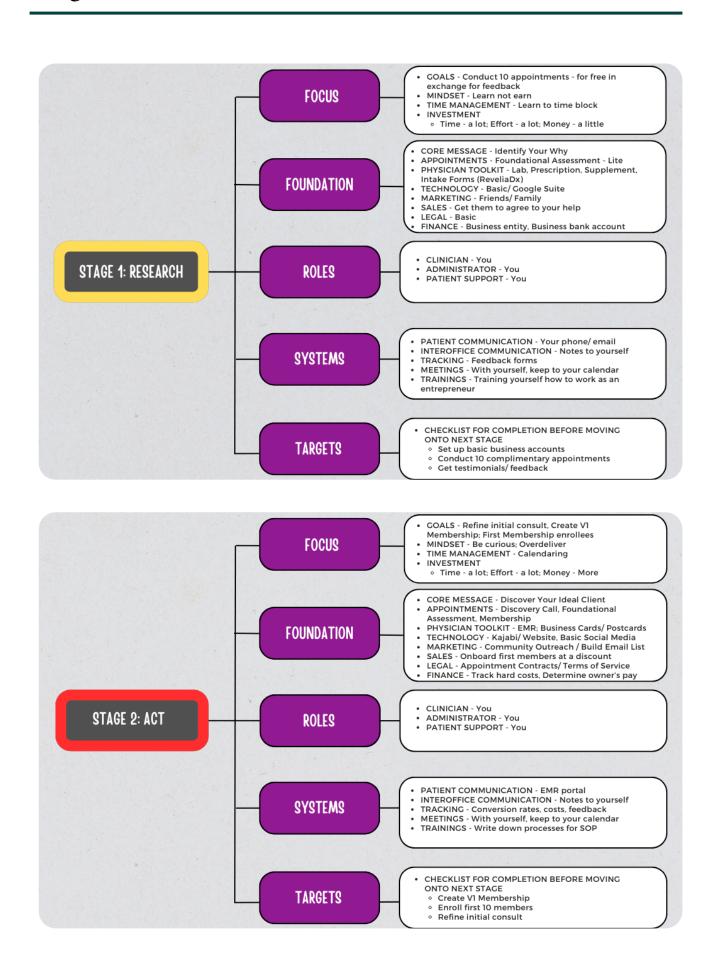
STAGE 3 - Refine

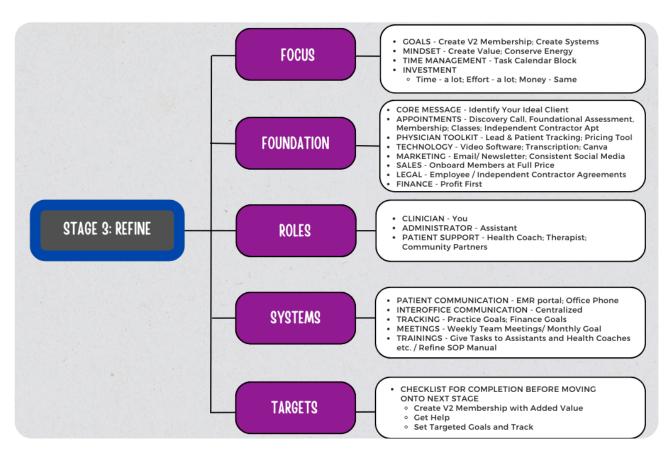
STAGE 4 - Grow

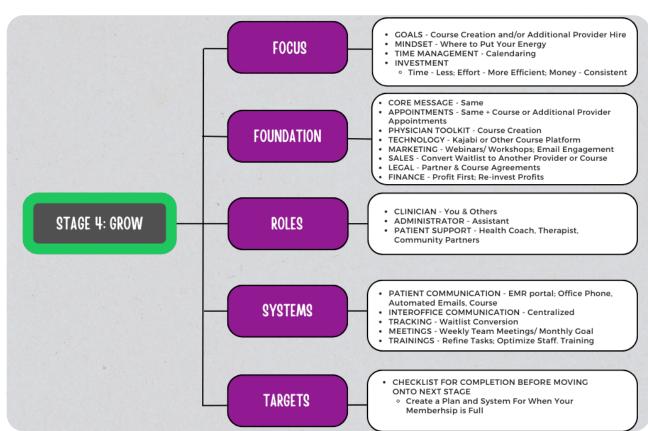
STAGING OUTLINE

STAGE

- → Focus
 - · Set goals
 - Mindset
 - Time Management
 - Investment for this stage
 - Time
 - Money
 - Effort
- → Foundation
 - Core Message
 - Appointments
 - Marketing
 - Sales
 - Legal
 - Finance
- → Roles
 - Clinician
 - Administrator
 - · Patient support (e.g., health coach, therapist, mindset coach etc)
- → Systems
 - · Patient communication
 - Interoffice communication
 - Tracking
 - Meetings
 - Trainings
- → Targets
 - Check list for completion before moving to next stage













Linda started Origins Functional Medicine 8 years ago searching for a way to effectively treat her patients and have a balanced life. After years of trial and error, she created a model and marketing system that worked, for both her and her patients. She spent years recording all of her processes, templates and systems down in the Practice Creation curriculum. She supports you by leading the weekly office hours and monthly workshops.





Cheryl has been teaching integrative medicine to physicians for over 20 years. She has compiled decades of clinical experience into the exclusive Incubator Clinical Curriculum, complete with a compendium and over 100 protocols. Cheryl supports you by leading the Clinical weekly office hours where she focuses on a different medical topic each week and leads discussions on case studies you submit.

Scott Rattigan, JD





Scott has been helping providers safeguard their practices for over 7 years. He supports you by leading live weekly office hours where he answers your legal & finance questions. You will have access to the entire Functional Lawyer library, the most thorough legal health template library with educational videos, 50-state legal summaries, and checklists to ensure your practice is protected.

Dawn Leach



Dawn began working with Linda over 8 years ago and they worked together to build Origins Functional Medicine. She supports you by being available for same-day phone support and assists your staff with processes and systems or any questions they may have. Dawn attends all Practice Creation and Workshop office hours.

Contents

Part	Contents	Page
1	Syllabus	7
2	Practice Management	12
3	Clinical	15
4	Legal & Finance	18
5	Marketing	23
6	Advanced Clinical	25
7	Working Together	28

			•	
Week of	Legal & Finance	Clinical	Practice Creation & Business Foundations	Workshop
OFFICE HOURS	MONDAY 12 p.m. EST	TUESDAY 12 p.m. EST	THURSDAY 12 p.m. EST	FRIDAY 12 p.m. EST
8/25/2025 Orientation	None	None	Orientation with Incubator Team	
9/01/2025	Open Q&A	Clinical Course Intro, Resources	Goal Setting & Getting It Done	
9/08/2025	Open Q&A	Principles of Functional Medicine & Case Study	Core Message & Business and Finance Set-up	Time Management & Calendaring
9/15/2025	Open Q&A	Gut Health & Case Study	Core Message (Part 2)	
9/22/2025	Open Q&A	Food Focus First & Case Study	Offer Creation & Lab/Supplement Registration	
9/29/2025	Open Q&A	NONE	Offer Creation (Part 2)	
10/06/2025	Open Q&A	Microbiome Mgmt. & Case Study	Membership Design & EMR, Payment Processor & Intake Qs	Core Message
10/13/2025	Open Q&A	Dysbiosis & Case Study	NONE	
10/20/2025	Open Q&A	Enzymes & Leaky Gut Case Study	Membership Design (Part 2)	
10/27/2025	Open Q&A	Top Tools and Symptoms & Case Study	Foundational Assessment & Office Space, Phone, & Scheduling	
11/03/2025	Open Q&A	NONE	Foundational Assessment (Part 2)	Offer Creation
11/10/2025	Open Q&A	Detoxification Strategies & Case Study	Lifecycle of Patient & Logo, Colors, & Branding	

Week of	Legal & Finance	Clinical	Practice Creation & Business Foundations	Workshop	
OFFICE HOURS	MONDAY 12 p.m. EST	TUESDAY 12 p.m. EST	THURSDAY 12 p.m. EST	FRIDAY 12 p.m. EST	
11/17/2025	Open Q&A	Fatigue and Adrenals & Case Study	Non-Physician Providers & Business Cards, Postcards, & Templates	FA Closing and Processes/ Discovery Call Scripts	
11/24/2025	THANKSGIV	'ING BREAK - NO OFFICE I	HOURS		
12/01/2025	Open Q&A	Estrogen, Progesterone, & Testosterone & Case Study	Pricing & Profit First & Legal Quick Start Guide		
12/08/2025	Open Q&A	Progesterone & Testosterone & Case Study	Pricing & Profit First (Part 2)	Pricing & Profit First	
12/15/2025	Open Q&A	Thyroid Mgmt. & Case Study	Website Design & Website Legal		
12/22/2025	CHRISTMAS BREAK - NO OFFICE HOURS				
12/29/2025	NO OFFICE HOURS				
1/05/2026	Open Q&A	Build a Better Immune System & Case Study	Professional Network / Community Outreach & Materials		
1/12/2026	Open Q&A	Diabetes and Lifestyle & Case Study	Community Talks & Digital Marketing	Standard Operating Procedures Manual	
1/19/2026	Open Q&A	Weight Loss & Case Study	Systems & Flow & Employee Handbook		
1/26/2026	Open Q&A	Pediatric Care & Case Study	Systems & Flow (Part 2)		
2/02/2026	Open Q&A	Mold Management & Case Study	Lead Magnets & Explainer Videos		

Week of	Legal	Clinical	Practice Creation & Business Foundations	Workshop
OFFICE HOURS	MONDAY 12 p.m. EST	TUESDAY 12 p.m. EST	THURSDAY 12 p.m. EST	FRIDAY 12 p.m. EST
2/09/2026	Open Q&A	Lyme Disease & Case Study	Social Media, Digital Marketing & Newsletter	Kajabi Expert
2/16/2026	NO OFFICE HOURS			
2/26/2026	Open Q&A	Top Master Regulators - Part 1 & Case Study	Tracking Growth, Launch & Testimonials	

Week of	Legal	Clinical	Practice Creation & Business Foundations	Workshop
OFFICE HOURS	MONDAY 12 p.m. EST	TUESDAY 12 p.m. EST	THURSDAY 12 p.m. EST	FRIDAY 12 p.m. EST
3/02/2026	Open Q&A	Top Master Regulators (Part 2) & Case Study	Goal Setting & Getting it Done	Newsletter Creation
3/09/2026	Open Q&A	NONE	Core Message & Business and Finance Set-up	
3/16/2026	Open Q&A	Methylation Basics & Case Study	Offer Creation & Lab/Supplement Registration	
3/23/2026	NO OFFICE HOURS			
3/30/2026	Open Q&A	Neurological Mgmt., Cognitive Decline & Case Study	Membership Design & EMR, Payment Processor & Intake Qs	

Week of	Legal	Clinical	Practice Creation & Business Foundations	Workshop	
OFFICE HOURS	MONDAY 12 p.m. EST	TUESDAY 12 p.m. EST	THURSDAY 12 p.m. EST	FRIDAY 12 p.m. EST	
4/06/2026	Open Q&A	Anxiety & Depression & Case Study	Foundational Assessment & Office Space, Phone, & Scheduling	Webinar Funnels	
4/13/2026	Open Q&A	Covid Long Haul & Case Study	Lifecycle of Patient & Logos, Colors, & Branding		
4/20/2026	Open Q&A	Cardiovascular Health (Part 1) & Case Study	Non- Physician Providers & Business Cards, Postcards, & Templates		
4/27/2026	Open Q&A	Cardiovascular Health (Part 2) & Case Study	Pricing & Profit First & Legal Quick Start Guide	Online Courses	
5/04/2026	Open Q&A	NONE	Website Design & Website Legal		
5/11/2026	Open Q&A	Nutritional Analysis/Chem Screen & Case Study	Professional Network/Community Partners & Materials		
5/18/2026	Open Q&A	Osteoporosis & Case Study	Community Talks & Digital Marketing		
5/25/2026	NO OFFICE HOURS				
6/01/2026	Open Q&A	Pain Management & Case Study	Systems & Flow & Employee Handbook		
6/08/2026	Open Q&A	Organic Acid Test & Case Study	Lead Magnets & Explainer Videos		
6/15/2026	Open Q&A	SIBO and SIFO & Case Study	Social Media, Digital Marketing & Newsletter		
6/22/2026	Open Q&A	Adjunct Cancer Care (Part 1) & Case Study	Tracking Growth, Launch & Testimonials		

Week of	Legal	Clinical	Practice Creation & Business Foundations	Workshop
OFFICE HOURS	MONDAY 12 p.m. EST	TUESDAY 12 p.m. EST	THURSDAY 12 p.m. EST	FRIDAY 12 p.m. EST
6/29/2026	NO OFFICE HOURS - JULY 4th			
7/06/2026	No Office Hours Community Support, Individual Calls, Phone Support Only			
7/13/2026	No Office Hours Community Support, Individual Calls, Phone Support Only			
7/20/2026	Open Q&A	Adjunct Cancer (Part 2) & Case Study	Community Support, Individual Calls, Phone Support Only	
7/27/2026	Open Q&A	Heavy Metals/Chelation & Case Study	Community Support, Individual Calls, Phone Support Only	
8/03/2026	Open Q&A	Build the Vessel/Vascular & Case Studies	Community Support, Individual Calls, Phone Support Only	
8/10/2026	Open Q&A	Case Studies	Community Support, Individual Calls, Phone Support Only	
8/17/2026		Community Support,	Individual Calls, Phone Support Only	

You will find that many of the Practice Creation lessons are revisited over the course of the year. This is by design. We have found that as practices evolve and grow, many of their processes, pricing, and overall messaging are revised and refined over time. Therefore, the curriculum is structured in a "spiral" format to revisit prior lessons and support the application of knowledge as the practice and the physician grow throughout the entrepreneurial process. This allows the physician built-in opportunities to reassess and pivot with guidance and support during office hours and through community feedback from their peers.

Practice Management

The first months of the Incubator Program, we are focused on the foundations of your practice. Each week, there is a lesson that builds on the week prior, leaving you with all the practice management, legal, finance, and foundational marketing practices in place. The order is sequential; the roadmap is complete. You just need to focus on the material of that week, complete the action items and move forward.



Included Bonuses

Standard Operating Procedures
Checklist

Employee Handbook

New Patient Manual

Done For You Chart Parts -Upload directly to your EMR

Email Welcome Sequence

New Patient Welcome Packet

Internal Practice Swipe Copy

Included Bonuses

Customized lab panels for (foundations, male and female hormone, cardiac and autoimmune)

Done For You Website Template - Customize the Template and hit Publish (15 landing pages)

Editable postcards, business cards and other marketing materials

Community Talk slide templates

Marketing Scripts

Practice Management Curriculum



Core Values

This is the foundation of your practice, and what you'll keep going back to as you make decisions.

- Identifying Your Why
- Writing Your Story
- Defining Your Ideal Client
- Clarifying Your Message



Practice Design & Core Appointments

Create and implement systems and lead flow around your unique membership program designed to support your ideal client:

- Discovery Call
- Foundational Assessment
- Membership Visits
- Education Series
- Lead Flow



Ancillary Support

Learn how to determine the kind of support most helpful for your patients and how to construct a patient appointment schedule that best utilizes this support.

This support is so important for both you and your patient.

- Health Coach Support
- Therapist Support
- And more

Practice Management Curriculum



Business Set Up Made Easy

Set up your business efficiently. We cover the critical steps, getting the foundations of your business set up, so that you aren't consumed by overwhelm and analysis paralysis when it comes to:

- Logo and colors
- Brick and Mortar vs Virtual
- Business cards and postcards
- Scheduling Software...and more



Effective Referral-Based Marketing

Learn how to leverage your time and money with grassroots, referralbased marketing so that you can fill your practice without spending any money on Facebook ads or SEO.

- Professional referrals
- Community referrals
- Community talks
- Lead flow follow up

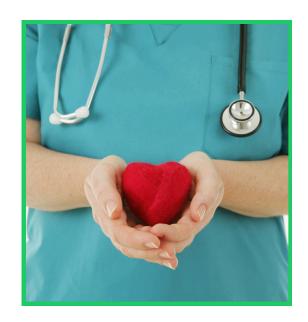


Launch, Goal Setting, and Tracking Success

- Learn the process to leverage your launch with contacts you already have. Now that all your processes are set up, you'll be ready to launch and seamlessly accept patients!
- Establish and track monthly goals, then exceed them
- Learn how to track potential patients with lead flow tracking sheets to optimize follow-up and conversion

Clinical

During the first four months of the program, while you are building out your business foundations, you will have the opportunity to move through the clinical curriculum at your own pace. This curriculum is designed to build upon functional and integrative your foundation for you to see patients confidently. Many of our physicians have had prior integrative training, and this course is designed to serve as a refresher in some areas and add to the physician's clinical knowledge in others.



Included Bonuses

Quick Protocol Reference Spreadsheet: You will receive a Protocol Spreadsheet that details over 130 conditions and gives brand specific treatments for each of them. This gives the practitioner a quick and easy reference when meeting with a patient with a particular pathology.

Live Case Study Review: This is the Integrative "residency" you've been looking for. You will not only learn a completely comprehensive curriculum, you will have the opportunity to work with Dr. Burdette as you evaluate and treat your patients.

Over 300 page Compendium: This clinical resource is years of work and clinical application, boiled down into the nuts and bolts of how to get started. The manual is broken down by condition (over 100 in total), and each condition is then followed by nutrients and phytocompounds that have been shown in the research to be effective for a condition. Following that, is a list of products that are effective in various conditions so you can quickly see which products to consider. The idea is that you edit this manual directly as you discover your own protocols and pearls along the way.

Clinical Curriculum



The Principles of Integrative and Functional Medicine

In the first weeks, we will dig into the foundational principles of integrative and functional medicine.

We will cover a real-world paradigm for effectively managing the individualization of care for the thousands of patients you will see. Complex diseases can have radically different causes from patient to patient. This can make functional medicine practice intimidating and daunting. Through our simplified instruction, you will use a manageable number of processes to examine the patient. You will quickly be able to individualize care in an evidenced-based approach.

Much like Baskin Robbins has 31 flavors but 29,791 combinations, you will learn how to put together treatment plans in various ways when you master the foundations. This drastically improves the individualization of care without being overwhelming.



Deep Dive Into Core Therapies

Here we will do a deep dive into core therapies that are utilized over and over across systems.

For example, in conventional medicine, one can be highly inflamed for many reasons, but there are only a handful of prescriptions to choose from, reducing complexity.

Similarly, you will learn how the essential core nutrients have wide applications from system to system and how they build a foundation in many areas. For example, when a complex patient comes

in with 30-40 symptoms, this in no way means they need 30-40 treatments. We will explore the interconnections in the body and how one system relates to another, allowing a handful of treatments to address many needs. This results in a simplified treatment plan for the patient to follow and further compounds their clinical success.

Clinical Curriculum



Improving the Well-Being of the Patient

A critical component under-addressed in conventional medicine is building the person.

Understanding methods to improve the well-being of the patient, not just treating a diagnosis, is imperative to optimal wellness.

This section will focus on strategies that boost weight loss, improve exercise efficiency, improve sleep quality, and aid in stress management.

As these areas improve, the door opens more and more for diagnostic and symptomatic improvement.



Addressing Individual Body Systems

We will next take a closer look at various systems and how to address them. We will look at the cardiometabolic continuum, immune health and various common infections, hormone management, and pediatric concerns. We will further develop treatment protocols for various conditions within the systems.

The legal & finance curriculum will cover you in areas that you may not have even realized you needed to pay attention to. You will have access to over 60 contracts, document templates to edit, and accompanying educational videos so you know how to use them appropriately. We also cover a comprehensive pricing and finance module so you know how to get adequately compensated and how to appropriately manage your revenue to avoid issues.



Included Bonuses

Legal Document Vault

All the documents that you need to protect yourself, your license, and your business. These 60+ legal document templates are law-firm quality, as they have been created in collaboration with a team of attorneys from various specialties.

Each template comes in MS Word format and is accompanied by a line-by-line video walkthrough of the template which explains some of the legal language in plain English, and highlights areas where you may want to edit for your situation.

Expand Through Telemedicine

Learn how to safely expand your practice through telemedicine from the foremost authority on telemedicine law, Scott Rattigan.

Having literally written the book on The Practice of Medicine, he also helps you construct your online course or education product so that you are legally providing a high-quality product without being confused with medical care.

You will also learn how to expand your practice legally--in your state or in 50 states--without worrying about breaking the law.



Growing Your Telemedicine Practice, Legally

Stay up-to-date and compliant in this quickly changing intersection of multistate law and medical regulations.

- Learn about the practice of telemedicine and how it differs from tele health
- Understand how to practice telemedicine legally depending on patient location
- Learn the rules of practicing telemedicine in terms of establishing care, continuing care when the patient leaves for college, vacation etc.
- Understand the business logistics of registering your practice of telemedicine
- Learn the malpractice requirements
- Understand the dos and don'ts of prescribing when you practice telemedicine



Business Startup Best Practices

Gain insight on all the foundational business aspects including:

- Should you file for a Trademark?
- Choosing a business entity
- Setting up your entity, bank account, local registrations, and IRS registrations
- Is S-Corp right for your practice?



Practice Patient Documents

Understand which patient contracts you need to have in place, and when to execute them:

- Informed consent
- Membership Agreement
- HIPAA
- Medicare
- Policies and Procedures
- Privacy Policy
- Good Faith Estimate
- Discontinuation of Care
- Supplement Disclosure



HIPAA Made Easy

Understand what you need in place besides a Notice of Privacy Practices. We make this complex set of laws and regulations simple and give you a step-by-step method to help you with compliance in the following areas:

- Daily and monthly compliance actions
- Annual audits
- Annual staff training
- How to write the mandatory written policies and procedures specific to your office
- What to do in the event of a breach (doing the wrong thing is worse than the breach itself)
- When you have to alert the media about a HIPAA breach at your office
- How to avoid fines because of the acts of others (your business associates)



Protecting Yourself Online

Learn how to completely protect yourself online with the following:

- Terms and Conditions, Privacy Policy, and Disclaimer
- Ensure your online dispensary is set up properly to avoid kickbacks
- What to say, and when and where, if you are an affiliate for another company (like Amazon Associates)
- How to protect yourself from Federal Trade Commission issues on social media
- How to arrange your online program or course to avoid telemedicine and regulatory issues
- And much more...



Money Management and Mindset

A complete guide to pricing, money management and mindset.

- Learn the money management system we use to help you be in charge
 of your money so that you NEVER have to worry about paying yourself
 or making payroll at the end of the month.
- How to prevent creditors from reaching into your personal assets so that you can have peace of mind
- How to find and hire a bookkeeper and an accountant, and how they are different



Hiring and Managing Your Dream Team

Learn the ins and outs of who to hire, how to hire them and what contracts you need in place to protect yourself and them!

- Learn when and how to hire an employee vs independent contractor
- How to correctly determine whether you have an employee or an independent contractor (and prevent the IRS from knocking on your door for years of back taxes)
- What is an employee handbook, why it's essential and what needs to be in it. (you'll have access to ours to edit)
- How to avoid overtime and minimum wage (Fair Labor Standards Act, or FLSA) issues
- How to avoid Family and Medical Leave Act (FMLA) issues
- How to lead effectively to prevent disputes and foster a culture of teamwork and growth

Marketing

Once your practice is created and your business, legal, and finance components are in place, it is time to start marketing. We teach a step-by-step method for starting the outreach process. You'll learn how to begin with grassroots marketing, as this is the quickest way to build your practice and then grow from there to the electronic space.



Included Bonuses

5 Educational Community Talk Templates

Webinar Slidedecks and Webinar Website Funnel Template

Lead and Member Newsletter Templates

Complete Kajabi Website with 15 landing pages - just update the colors / pictures and text

Social media templates and calendar

Introduction to online ads and marketing

Email list creation and CRM (customer relationship management) support

Marketing Curriculum



Social Media and Content Creation

Learn how to create a posting calendar as well as design posts:

- Social media planning calendar
- Social media example posts
- Social media ads
- Learn how to batch and create content effectively and efficiently



Building An Online Course

Learn how to construct and build out an online course:

- Course brainstorm
- Email and outreach marketing for the course



Newsletter and Email List

Learn how to create lead magnets to build out your email list in order to keep in touch with interested potential patients:

- Newsletter
- Lead magnets with follow up email



Webinar

Learn how to create, market for and execute an effective webinar:

- Email marketing
- Webinar funnel
- Webinar slides

Advanced Clinical Curriculum

As you continue to grow and accept patients, you will encounter new clinical presentations and disease processes that you may want to curbside a colleague on or gain additional education or knowledge around. This is where the advanced curriculum comes It builds upon into play. foundational modules so that you feel empowered and confident with your patient interactions. This curriculum is added to and updated on a continual basis.



Advanced Clinical Curriculum



Advanced Therapies and the Complex Patient

- Mold Management
- Lyme Management
- Covid Long-Haul Management



How To Integrate Top Botanicals

We will examine commonly used botanicals and how to apply in patient care. (2 parts)



Advanced Brain Health

- Neurologic Management, Cognitive Decline
- Depression/ Anxiety



Common Testing In Functional Medicine

- Advanced cardio labs
- Organic acid testing
- Nutritional inferences taken from chemistry screens and
- CBCs
- And More...

Ongoing Support After Year 1

Alumni Program

Beyond the initial year of intensive mentorship and guidance we offer ongoing support in our Alumni Program. This is a community of innovation and collaboration that propels you toward sustained success and includes:

- Weekly Legal office hours
- Alternating bi-weekly office hours Practice Creation and Expert Speakers
- Weekly Clinical office hours
- 10 Friday Workshops
- Continued Access to the Community
- Access to all Office Hours Recordings
- Updated electronic course content
- Same day support
- Member pricing for 1-on-1 Coaching Calls



Working Together



Who We Work With

We are excited to work with licensed physicians who are passionate about functional medicine and creating a membership practice. The Incubator is built on a spirit of community and generosity of systems and tools that have been tested and proven. Therefore, it's important to us that every member has that same spirit of kindness, generosity, and support to others.

We are a heart-centered company and love to work with heart-led physicians.

This program is right for you if . . .

- You are a licensed MD, DO or ND.
- You are ready to start a functional medicine practice (or convert a practice) and want proven systems and individualized guidance with support from a community of your peers, OR
- You have started your own practice and know it could be optimized to create more time, more revenue, and better patient outcomes, and you would like proven systems and individualized guidance with support from a community of your peers.
- You are enthusiastic about connecting with patients at a deeper level and dream about a practice that reflects you and your unique healing approach.
- You aren't afraid to try, and are kind and supportive to others who are trying as well.

Working Together



Next Steps

If you'd like to learn more and see if the Incubator program is right for you, we invite you to schedule a strategy session. This is a 45 minute phone call where Dr. Matteoli will first listen about where you've been, what you'd like to create and what has worked or hasn't worked for you in the past. We will then discuss an initial strategy based on your goals.

If after about 30 minutes it seems like you may be a good fit for the program, we'll open up the course, take you on a tour and answer any and all questions you may have.

Schedule A Call

originsincubator.com/chat

