

STAGES: PRACTICE CREATION

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

STAGE: OVERVIEW

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graph LR; Overview[STAGE: OVERVIEW] --- Focus[FOCUS]; Overview --- Foundation[FOUNDATION]; Overview --- Roles[ROLES]; Overview --- Systems[SYSTEMS]; Overview --- Targets[TARGETS]; Focus --- FocusList["• GOALS<br>• MINDSET<br>• TIME MANAGEMENT<br>• INVESTMENT"]; Foundation --- FoundationList["• CORE MESSAGE<br>• APPOINTMENTS<br>• PHYSICIAN TOOLKIT<br>• TECHNOLOGY<br>• MARKETING<br>• SALES<br>• LEGAL<br>• FINANCE"]; Roles --- RolesList["• CLINICIAN<br>• ADMINISTRATOR<br>• PATIENT SUPPORT"]; Systems --- SystemsList["• PATIENT COMMUNICATION<br>• INTEROFFICE COMMUNICATION<br>• TRACKING<br>• MEETINGS<br>• TRAININGS"]; Targets --- TargetsList["• CHECKLIST FOR COMPLETION BEFORE MOVING<br>• ONTO NEXT STAGE"];
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FOCUS

- GOALS
- MINDSET
- TIME MANAGEMENT
- INVESTMENT

FOUNDATION

- CORE MESSAGE
- APPOINTMENTS
- PHYSICIAN TOOLKIT
- TECHNOLOGY
- MARKETING
- SALES
- LEGAL
- FINANCE

ROLES

- CLINICIAN
- ADMINISTRATOR
- PATIENT SUPPORT

SYSTEMS

- PATIENT COMMUNICATION
- INTEROFFICE COMMUNICATION
- TRACKING
- MEETINGS
- TRAININGS

TARGETS

- CHECKLIST FOR COMPLETION BEFORE MOVING
ONTO NEXT STAGE

STAGE 1: RESEARCH

FOCUS

- GOALS - Conduct 10 appointments - for free in exchange for feedback
- MINDSET - Learn not earn
- TIME MANAGEMENT - Learn to time block
- INVESTMENT
 - Time - a lot; Effort - a lot; Money - a little

FOUNDATION

- CORE MESSAGE - Identify Your Why
- APPOINTMENTS - Foundational Assessment - Lite
- PHYSICIAN TOOLKIT - Lab, Prescription, Supplement, Intake Forms (ReveliaDx)
- TECHNOLOGY - Basic/ Google Suite
- MARKETING - Friends/ Family
- SALES - Get them to agree to your help
- LEGAL - Basic
- FINANCE - Business entity, Business bank account

ROLES

- CLINICIAN - You
- ADMINISTRATOR - You
- PATIENT SUPPORT - You

SYSTEMS

- PATIENT COMMUNICATION - Your phone/ email
- INTEROFFICE COMMUNICATION - Notes to yourself
- TRACKING - Feedback forms
- MEETINGS - With yourself, keep to your calendar
- TRAININGS - Training yourself how to work as an entrepreneur

TARGETS

- CHECKLIST FOR COMPLETION BEFORE MOVING ONTO NEXT STAGE
 - Set up basic business accounts
 - Conduct 10 complimentary appointments
 - Get testimonials/ feedback

STAGE 2: ACT

FOCUS

- GOALS - Refine initial consult, Create V1 Membership; First Membership enrollees
- MINDSET - Be curious; Overdeliver
- TIME MANAGEMENT - Calendaring
- INVESTMENT
 - Time - a lot; Effort - a lot; Money - More

FOUNDATION

- CORE MESSAGE - Discover Your Ideal Client
- APPOINTMENTS - Discovery Call, Foundational Assessment, Membership
- PHYSICIAN TOOLKIT - EMR; Business Cards/ Postcards
- TECHNOLOGY - Kajabi/ Website, Basic Social Media
- MARKETING - Community Outreach / Build Email List
- SALES - Onboard first members at a discount
- LEGAL - Appointment Contracts/ Terms of Service
- FINANCE - Track hard costs, Determine owner's pay

ROLES

- CLINICIAN - You
- ADMINISTRATOR - You
- PATIENT SUPPORT - You

SYSTEMS

- PATIENT COMMUNICATION - EMR portal
- INTEROFFICE COMMUNICATION - Notes to yourself
- TRACKING - Conversion rates, costs, feedback
- MEETINGS - With yourself, keep to your calendar
- TRAININGS - Write down processes for SOP

TARGETS

- CHECKLIST FOR COMPLETION BEFORE MOVING ONTO NEXT STAGE
 - Create V1 Membership
 - Enroll first 10 members
 - Refine initial consult

STAGE 3: REFINE

FOCUS

- GOALS - Create V2 Membership; Create Systems
- MINDSET - Create Value; Conserve Energy
- TIME MANAGEMENT - Task Calendar Block
- INVESTMENT
 - Time - a lot; Effort - a lot; Money - Same

FOUNDATION

- CORE MESSAGE - Identify Your Ideal Client
- APPOINTMENTS - Discovery Call, Foundational Assessment, Membership; Classes; Independent Contractor Apt
- PHYSICIAN TOOLKIT - Lead & Patient Tracking; Pricing Tool
- TECHNOLOGY - Video Software; Transcription; Canva
- MARKETING - Email/ Newsletter; Consistent Social Media
- SALES - Onboard Members at Full Price
- LEGAL - Employee / Independent Contractor Agreements
- FINANCE - Profit First

ROLES

- CLINICIAN - You
- ADMINISTRATOR - Assistant
- PATIENT SUPPORT - Health Coach; Therapist; Community Partners

SYSTEMS

- PATIENT COMMUNICATION - EMR portal; Office Phone
- INTEROFFICE COMMUNICATION - Centralized
- TRACKING - Practice Goals; Finance Goals
- MEETINGS - Weekly Team Meetings/ Monthly Goal
- TRAININGS - Give Tasks to Assistants and Health Coaches etc. / Refine SOP Manual

TARGETS

- CHECKLIST FOR COMPLETION BEFORE MOVING ONTO NEXT STAGE
 - Create V2 Membership with Added Value
 - Get Help
 - Set Targeted Goals and Track

STAGE 4: GROW

FOCUS

- GOALS - Course Creation and/or Additional Provider Hire
- MINDSET - Where to Put Your Energy
- TIME MANAGEMENT - Calendaring
- INVESTMENT
 - Time - Less; Effort - More Efficient; Money - Consistent

FOUNDATION

- CORE MESSAGE - Same
- APPOINTMENTS - Same + Course or Additional Provider Appointments
- PHYSICIAN TOOLKIT - Course Creation
- TECHNOLOGY - Kajabi or Other Course Platform
- MARKETING - Webinars/ Workshops; Email Engagement
- SALES - Convert Waitlist to Another Provider or Course
- LEGAL - Partner & Course Agreements
- FINANCE - Profit First; Re-invest Profits

ROLES

- CLINICIAN - You & Others
- ADMINISTRATOR - Assistant
- PATIENT SUPPORT - Health Coach, Therapist, Community Partners

SYSTEMS

- PATIENT COMMUNICATION - EMR portal; Office Phone, Automated Emails, Course
- INTEROFFICE COMMUNICATION - Centralized
- TRACKING - Waitlist Conversion
- MEETINGS - Weekly Team Meetings/ Monthly Goal
- TRAININGS - Refine Tasks; Optimize Staff. Training

TARGETS

- CHECKLIST FOR COMPLETION BEFORE MOVING ONTO NEXT STAGE
 - Create a Plan and System For When Your Membership is Full