

# **The Medical Fitness IMPACT Plan**

## **How to Reverse Chronic Disease and Degeneration While Building Your Bottom Line**

By JR Burgess, MS

Two-Time #1 Bestselling Author, CEO of Rejuv Medical and HealthOvators

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## Foreword

Dr. Joel Baumgartner, M.D., Medical Visionary

The current state and uncertainty the healthcare system brings has required diligent focus from physicians, private practices and hospital systems to formulate solutions. The current structure brings intense challenges for private practices to survive. With rising healthcare costs, reimbursements continue to experience cuts, leaving many medical systems vulnerable. The upside is that there is a large opportunity for practices to protect their futures by adding cash-based models and preventable care to their current standard. This model will restore health in patients and it is proving to mature at an extraordinary pace. In 2018, Centers for Medicare and Medicaid Services released “The Diabetes Prevention Program” (DPP) creating the first opportunity for preventative services such as personal training, health coaching, and wellness services to be covered by insurance.

When it comes to the state of health care now, where we are is the following:

- Obesity is on the rise
- Disease is on the rise
- Prescriptions increase annually
- Healthcare costs are on the rise
- Insurance rates are on the rise
- Deductibles are on the rise
- Reimbursements are decreasing
- Bundled payments and outcome-based quality measure are on the rise
- Managed care is increasing

The obesity epidemic as well as the incidence of disease and injury have forced the need for a preventable, medically integrated, outcome-based model of medical fitness. Today's crisis

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leads to an urgent new paradigm in healthcare delivery that will combat the rise in chronic disease and associated healthcare costs. It is our focus, along with numerous other affiliations such as the Medical Fitness Association and Medical Fitness Network, to facilitate bridging the gap between evidence-based health-centered treatment and long-term disease prevention strategies.

## **We Incorporated Medical Fitness to Create Change in A Broken System**

The 6-step “Medical Fitness I.M.P.A.C.T. Plan” outlined in this book and developed at Rejuv Medical is the future of medicine. A little over ten years ago, I opened Rejuv Medical. I was practicing at a large hospital-based clinic. Days consisted of working long hours, with an overbooked schedule and little time or energy to spend with family. I felt that the quality of outcomes with many traditional services and medications were far from optimal. I was prescribing medications to get patients through the pain and didn’t have an opportunity to fully treat and guide them in a comprehensive manner to create health and change in their lives.

I first opened Rejuv to operate as a small functional, regenerative medicine and aesthetics clinic. Prolotherapy, PRP, Botox, laser, and skin care treatments were the primary focus. I made this decision because the hospital system I was employed by decided to close its doors. Fortunately, I had a following of previous patients and decided it was time to go all-in with an insurance-based non-surgical orthopedics and sports medicine practice. It was time to treat patients “the right way.” The goal was, and continues to be, to give patients the gift of true health based on research and sound science.

The broad medical fitness vision I had started to take shape when JR Burgess walked through my newly formed practice. While going through graduate school, JR was a personal trainer and was seeking my help for a rugby injury that had plagued him for years. In our

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conversations, I found he was unhappy with the long-term financial outlook of personal training in a large corporate gym. He had just finished graduate school and was talking about a desire for a new career and was leaving the gym to go back to building water towers. JR held this position while successfully paying his way through school. He spoke of his passion to help individuals lose weight, who would otherwise struggle on their own. He loved the show *"The Biggest Loser"* and how the show utilized a medical approach to help those who were the most desperate to achieve weight loss and restore their health.

During our conversations, I mentioned I always had a vision to combine the science of medicine and the physiology and endocrinology of the body to develop a healthcare model that creates permanent changes and regeneration my patient's lives. I wanted to deliver a healthcare model that could turn back the clock and heal degenerative disease and injury while restoring health and vitality to my patients.

During his second Prolotherapy appointment, I let him know that our conversations had me thinking about the impact of obesity on today's society. I have always taught (and preached) that we need to stop covering up the symptoms and the causes associated with each diagnosis. Cortisone does not repair the painful, arthritic knee, nor does diabetes medication make disease disappear. Prescribing one medication after another does not fix anything. It was time to abandon the Band-Aids and restore health.

There was (is) a great need to rectify the lifestyle behaviors that led patients to their current health status. The patient with bad knees was helpless until he lost the 50 pounds that was causing the arthritic joints. The diabetic patient was still going to have complications and be dependent on medication if he or she didn't lose weight and make positive lifestyle changes to change the endocrinology that was slowly killing them. All medical professionals know how much of an impact a healthy diet, proper exercise and healthy behavioral changes can have on someone's life.

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## Inspired to Create More Significant Change

It was “*The Biggest Loser*” that spearheaded the conversations JR and I had regarding how we could make a difference in the world. The show proved how powerful a doctor’s message can be when telling patients it’s imperative to focus on healthy lifestyle changes. Doctors are regarded as the highest authoritative source in today’s society. The unfortunate part is when doctors tell patients to eat healthy and exercise, but don’t show patients the means or have systems to help patients make permanent lifestyle changes, nor do they have the time.

Therefore, I look at my Medical Fitness Specialists (formerly known as personal trainers) as the key to making long-lasting lifestyle and health changes. The MFS Team has several contact hours with each patient to help apply the healthy programs we created. Our goal, through the education systems we’ve created, is that each patient graduates from our program with the knowledge they are empowered to make sustainable change. One of our goals is to empower each of our clients and patients to have practical knowledge on nutrition, exercise, anatomy, physiology, endocrinology, and psychology so they can, in turn, change the lives of their families, friends and communities.

My purpose is not to verbally attack the government, pharmaceutical companies or insurance companies who continue to advocate for dangerous procedures like gastric bypass, or doctors who write one prescription after another without fully counseling their patients on proper nutrition and exercise. My mission is to make an impact large enough to get the attention needed to change the way the healthcare system operates. Ultimately, my intention is to reverse and decrease chronic diseases that are killing our patients, families, and communities.

The focus should be to empower our patients to take their health into their own hands through education, exercise, nutrition and healthy lifestyle management. Everything in our

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program is evidence-based. With the right professionals and precise training, you can handle any patient with high-risk needs and give them the gift of long-lasting health and vitality.

We health professionals have an obligation to help change the lives of millions. This model is the solution to helping individuals lose weight, optimize health and reverse degenerative disease without masking the root cause. It also will create an atmosphere of health that starts in your practice and spreads throughout your community.

In ten years, we have grown leaps and bounds, and are building momentum for a viable and long-lasting entity that will help society rebound from the current healthcare crisis. I found we can market medical fitness in completely different way than traditional medical practices. The world is hungry for healthy weight loss and people are fed up with quick fix gimmicks. Medically supervised weight loss and fitness programs created by a physician have a unique selling position that puts us in a category of one. It lends credibility that attracts those who have struggled to gain control over their weight for years.

It will forever be our mission to get the “Medical Fitness I.M.P.A.C.T. Plan” covered by all insurance plans. It is the only way our healthcare system can survive the “growing” disease epidemic.

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# Chapter 1: The Visionary and the Implementer

## Taking On a Mission to Change Outcomes for Better Health

**“Successful physicians look for opportunities.”** ~ Shelly Reese, Medscape (from the article *Why Some Practices Are Wildly Successful*), October 22, 2012

When I first joined Rejuv, the team consisted of five employees. Now, ten years later, Rejuv Medical has four locations and employs 90 team members. Each team member is empowered to change the way healthcare is known and delivered. In addition, we have enriched 74 practices in four different countries, we have opened or added a 6-step, turn-key system we created and named “The Medical Fitness I.M.P.A.C.T. Plan” and have helped change client communities for the better. (You will learn that I.M.P.A.C.T. is the acronym that unlocks the power of the 6-step system.)

Joining Dr. Baumgartner in January of 2010, my journey started as the “Implementer”. This role, also known as the Medical Fitness Coordinator, was responsible for assisting Dr. Baumgartner to propel his vision forward. My graduate studies held an intense focus on nutrition and sports management. Over the years, I gained the reputation of being the “go-to” trainer at the nationally-recognized gym in the area for weight loss and nutrition accountability. I could guide, motivate and successfully bring multiple clients to a loss that brought them to a healthier weight and lifestyle. I’ve always had the yearning to coach; I was born with a talent for it. I was confident I would benefit Dr. Baumgartner’s patients in recognizing success and facilitating the growth and development of future team members. We discussed rolling forward with the approach in the correct fashion, with proper diet and exercise to truly improve the lives of those we served. We developed a model that, through education, taught people to make the lasting lifestyle changes needed to optimize health and even reverse disease and degeneration.

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The location for the Medical Fitness Coordinator (Trainer) role where I first started out was a small 8' x 10' space I called "the closet". A handful of my former clients came with me, so it was almost no cost to Dr. Baumgartner's practice other than my salary. In the mornings and evenings outside clinical hours, I would utilize the hallways and lobby for walking lunges, movement-based exercises and plyometrics.

In just two months, I had to bring on two new trainers, Christine B. and Rich S. The intensity of the programming and word of mouth developed rapidly, which was a good problem to have although there was no room inside the clinic. We contracted with another smaller fitness facility, paying the monthly membership for each of our patients. When spring came, Rich and I would use the local high school football field and track for outdoor boot camps and sports performance training. The physical therapist traded rooms so I could train multiple people at one time and soon grew into the 10'x14' room right next door.



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Eight months and 100 patients later, we decided we needed to have our own standalone fitness center. Locating indoor space to keep our momentum going before the Minnesota winter hit full force became a priority. At that time, the cost per membership we were paying at the other training facility would cover the overhead at a separate location. It would have been ideal to have the clinic and gym under the same roof but, given our leasing situation, that was not a possibility at the time. We sought out the most economical location available. A realtor found a 6,400-square-foot facility that we renovated in just two months. This location allowed us to expand beyond personal training to include boot camps and group fitness. With the larger space, we grew rapidly in a very short time.



### **Nearly A Decade Later**

It has been just over nine years since my first day of work at Rejuv. We have improved the lives of over 3,500 patients make life-giving changes. In the first 10 months prior to our standalone location, we were profitable because there was very little overhead. The first year at the Weight Loss & Performance Center, we had nearly \$180,000 in losses, as a

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standalone, due to the build-out, new equipment, additional administrative support and day-to-day overhead expenses.

Even though we lost money due to the build-out and equipment acquisition cost, the motivator was that the investment paid for itself. The new patients who came for the weight loss and fitness program generated over \$300,000 in new revenue from the referrals to the clinic. It took exactly one year and one month to have our first profitable month as a standalone fitness facility. To this day, we have utilized our fitness facility as a marketing differentiator and entry point to bring new patients in to our clinic who are ready for positive long-term lifestyle changes.

In a very short time, both our fitness center and clinic grew at a rapid pace. The original goal was not to create a master plan of driving fitness patients to our clinic. We originally developed ourselves to be a concierge service to Dr. Baumgartner's patients with the plan to improve outcomes rather than as a specific means to attract new patients to the clinic. We instantly recognized that this was the type of program that the community was seeking. The medical integration piece created trust and comfort for those who would not normally join a gym. We knew we could optimize our patients' results with functional medicine and safely progress patients suffering from pain and degeneration. Communicating between the medical and fitness staff, we could provide the maximum safety, progression and results by integrating our care.

We faced our share of ample mistakes along the way. Countless hours were spent developing our program from scratch and we exhausted an ocean of money on ineffective advertising. We set up pricing structures incorrectly and had no continuity revenues built in to our programs. Blocks of sessions were sold rather than putting clients on automatic payment processing or long-term life-changing programs. In the beginning, I was not the leader I needed to be for our business. Years of struggles with self-confidence and

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challenging what I perceived as unnecessary authority turned me into a person who reacted first versus seeking to understand.

I've since accumulated a much greater purpose through my faith, support systems, leadership and mastermind training that Dr. Baumgartner invested in for my attendance. I was always a caring and passionate leader, but I had to overcome my habitual communication style to become more influential. Much time has passed. I've grown. I have grown immensely on a personal level as well as cultivating an organization we have discovered how to operate much more effectively. Over the past nine years, Dr. Baumgartner has invested \$375,000 in just my training, not including what he spends on the rest of the team who receive top-level business, marketing, automation, leadership and system management mentorship. We have all have harnessed the investment!

### **Multiple Eggs Means Stability**

Years in medical school taught Dr. Baumgartner to be a great doctor. My education gave me a base of basic business management. Like many new adventures, we were not the most advanced when it came to building a successful business. Over time, our model has grown following a strategy of adding different sources of revenue to the business model once one sector is performing well. Positioning all your eggs in one basket makes you vulnerable. It's all about creating multiple streams of income and increasing the value of each patient while maximizing each patient's health outcome.

There are going to be swings in the economy. Prepare yourself for those moments with a recession-proof business, so you will keep sailing no matter what happens. With the uncertainty of healthcare reform, it is critical we take protective measures to ensure the success and livelihood of our practices. Devising a strong blend of cash-paying services, along with insurance-contracted services, is critical to your survival in today's competitive business environment.

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Traditionally, medical services tend to slow a little in the first month or two after the New Year due to the reset of insurance deductibles. Developing multiple streams of income makes for a stable system no matter what time of year, whether Dr. Baumgartner is seeing patients or is out of the office educating through speaking engagements. Today our practice can survive on its own with the current team we have even if Dr. Baumgartner were to remove himself from the practice.

	2009	2010	2011	2012	2013	2014	2015	2016
<b>Total Sales(Revenue)</b>	1,343,922.32	2,166,000.03	2,443,240.36	3,061,528.14	3,007,185.42	3,322,826.00	5,059,227.00	6,760,562.00
<b>Fitness (Revenue)</b>	NA	131,210.82	314,121.34	675,219.12	666,448.89	804,903.00	1,232,955.00	1,418,107.00
<b>Fitness Referral</b>	NA	107,890.00	206,040.45	345,678.90	392,825.00	588,220.00	928,265.68	1,169,053
<b>Net Income</b>	459,688.90	211,894.25	150,103.26	272,017.54	47,304.00	(225,000.00)	61,758.92	159,012.00
<b>Net Income + Salary</b>	569,288.90	701,469.09	566,347.76	705,597.85	387,304.00	115,000.00	401,758.00	479,000.00

In January of our third year, which is typically a 'slow' month, the Weight Loss & Performance Center netted \$50,551.75. Despite deductibles resetting, a potential slow month at the clinic can still be a very lucrative month. Dr. Baumgartner could have taken the whole month off without affecting the bottom line. The practice is still making an impact on the community and generating an income without the need to have the medical providers be present at all times. This also creates an environment for higher retention of our providers due to their satisfaction as a result of having multiple team members.

Due to the success of growing Rejuv and the education I was receiving, I became the Chief Financial Officer (CFO) and Practice Administrator. After implementing and improving efficiencies in both the clinic and fitness facility, along with experiencing some very tough

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trials with staff that expressed I was the wrong fit due to my lack of medical background, I urged Dr. Baumgartner to share our model to the world. It was a vital decision.

He was hesitant at first as it's in his nature (as a physician) to be a perfectionist. He did not feel comfortable selling a model when we still had gaps in certain areas in our operation. I convinced him that perfection is nearly impossible in any clinic and we would always have continuous improvement efforts at Rejuv through Lean, 6 Sigma and EOS Traction (three systems for achieving continuous improvement). I reassured him that this was also my baby and could never imagine myself not caring so deeply that I would allow myself to grow away from Rejuv. Stressing that our success at Rejuv is the only way I could ever confidently market this model to other physicians, and that the vision we had for impacting healthcare worldwide, meant we had to become leaders with this innovation.

### **Taking the Model to the Streets**

In 2014, Dr. Baumgartner made the leap. It was time. He and I partnered in a new company called MedFit LLC. to help spread our Medical Fitness I.M.P.A.C.T. Plan to the world. I became the Chief Executive Officer (CEO) of both companies and started with four other practices nationwide who were interested in what we created.

In one of the opportunities, we established another Rejuv Medical in Tucson, AZ with Dr. John Tait. Dr. Tait was going to start a clinic with the same offerings we had in Minnesota. Another opportunity was in Chicago with a group that had a Physical Medicine & Rehabilitation and Functional Medicine practice. Another was a successful OB/GYN physician who was not looking to grow but rather to have an ancillary revenue source that would help her patients with healthy labors, gestational diabetes, postpartum depression and healthy body weight composition post-baby. The fourth opportunity was a chiropractic clinic looking to grow and present preventative medicine and fitness as a solution to create a positive impact in their community.

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Each scenario was another level up for us in presenting new challenges, such as coaching other trainers and practice owners to buy-in to the same philosophies and strategies to effectively implement and strengthen the program. Learning and growing a deep understanding of practice management through consulting with various experts, Medical Group Management Association, and American Alliance of Orthopedic Executives while having no formal medical administration training presented its own challenges.

Management, leadership and coaching are much of the same in terms of execution; however, the approaches with each group required a deep and intensive learning curve. Whether coaching and leading patients, trainers, staff, or physicians, many of the same principles exist in creating understanding and crafting skills. To create change and development, one must understand we are each our own limiting factor for progression, self-fulfillment and triumph. Until we take full responsibility for our course, vision and results, it's very difficult to inspire a team for massive growth. The evolution we personally craft are where the quantum leaps occur. The skills and technical components can be acquired or easily delegated once we connect with our deep reasoning with why we are doing what we are doing.

We must become aware of our gaps and implement the necessary changes in ourselves and our practice to see the outcomes we desire in life. The right coaching and support will provide the strategic path and opportunities to fulfill your vision. Many of the people I coach have big dreams but some are not ready for the change it takes. My goal for all is the same - tough love, conversations in identifying gaps, solution identification, strategy planning and taking massive action. I want all my clients to be an ANT (Action Not Talk).

Not all our groups have been as successful as others and some have even failed. I must look in the mirror first as personal accountability in a recurring assessment. We delivered way too much information without a step-by-step action plan based on where they were when we met them. We provided everything without holding back, which can be intimidating

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when not prepared for the intensity of the hard work necessary to reap the rewards. Not all Implementers, physicians or practice owners had the same skill sets that Dr. Baumgartner and I have been blessed with or trained for in our careers. Additionally, many were not willing to put in the same kind of work hours, be disciplined with their time in learning new skills, nor invest the way we did in terms of marketing and staff development.

In the beginning, I had difficulty having the very real conversations with physicians and Implementers. It was up to me to reflect that it did not seem that they were willing to take full responsibility for the change necessary to grow the way we did. We thought they could all have the same success by adding the full spectrum of care the way we did from the beginning. We didn't force key performance metric reporting to see daily gaps and where customized training needed to occur. We just thought they could implement all at once the way we did. We didn't have the structure, weekly training and coaching dialed in the way we do now. We needed to deliver more structure, customization and support. Structure is the only way to achieve freedom and automation.

### **Formalizing the 6 Steps**

Once we identified the gaps in our delivery, we created our 6-step formal process, "The Medical Fitness I.M.P.A.C.T. Plan". This Plan is a blueprint that guides each new clinic through the specific steps of growth with customized coaching, support, skills training and being part of our community. We had to adapt so we could better serve practices that were ready to make the same impact we were providing our community.

Presently, we turn away more people than we accept into the Medical Fitness I.M.P.A.C.T. Plan based on our assessments and application process. If there are gaps that would prevent any chance of success, we hold on moving forward until they finish the first three pillars of the "The 5 Pillars of Practice Success" our high-level business and marketing mastermind training course. Our mastermind platform consists of Five Pillars: Personal

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Development, Business, Marketing and Sales, Medical Fitness and Integration. Each pillar dives deep into all the necessary components for lasting practice success and personal fulfillment. This training will provide great value for the practice and significantly increase the thriving implementation of “The Medical Fitness I.M.P.A.C.T. Plan” in their facility. These prerequisites significantly increase one’s practice success rate.



Our success to date has been due to initial sacrifice through intense and extreme working hours from Dr. Baumgartner and I, along with a team that has continuously supported our mission to make an undeniable impression in healthcare. I look at how important each of those team members have been in our journey. Without several of them, their sacrifices and investment of time in our organization, I would not be here writing this book.

The investment and resources dedicated to building our programs, our team and personally learning from the world’s best was, and will always remain, a priority. Our mission and success would not have been possible without all the virtuous, brilliant and

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results-driven team members that we have been blessed with in our organization. We are forever indebted to our team and our patients who have guided us to the place we are today.

We have made our program as turn-key as possible, although to accomplish this each team member must be willing to sacrifice, change, learn, lead and invest in their team and program to make their vision come to life. Before any practice is considering this model, a Discovery Call with the potential candidate consists of an assessment to determine the most effective action steps to build the practice that can change the lives of those you serve.

[Take your 5 Pillars of Practice Success Assessment Here](#)

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## Chapter 2: Integration Grows the Practice and Revenues

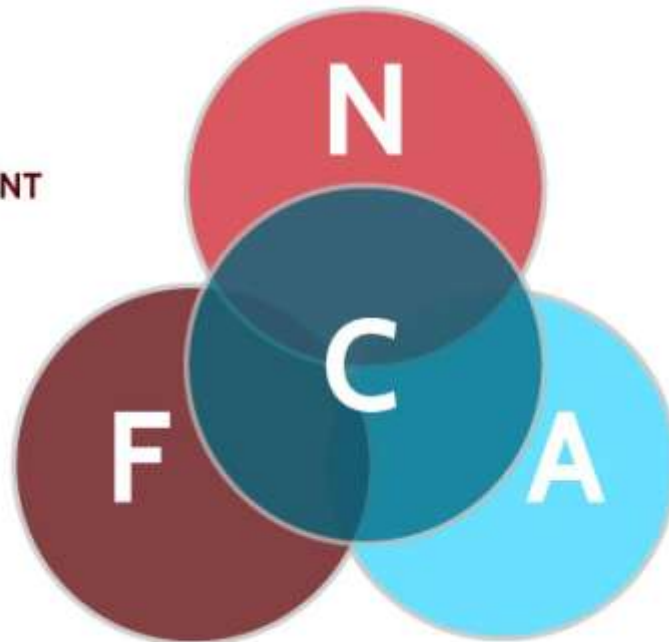
**“Physicians sometimes tend to be cautious, so they miss out on a lot of opportunities.”** ~ Leigh Page, MS, Medscape (from the article *Six Ancillary Services Worth Considering*), October 15, 2012

One of our differentiators in treatment is the Rejuv C.F.A.N. process that communicates our method for producing the best possible healing outcomes. Following is an overview of our C.F.A.N. process. Essentially, we are looking at the state of Cellular health, Functional movement, Articulation and Nerves to determine the extent of recovery required and how to prioritize a treatment plan. This is part of our proprietary process in assessing our patients in their progress toward greater health and vitality.

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**C**ELL HEALTH  
**F**UNCTIONAL MOVEMENT  
**A**RTICULATION  
**N**ERVES



- SUPPLEMENTS
- FUNCTIONAL MEDICINE
  - HORMONE OPTIMIZATION
  - MICRONUTRIENT BALANCING
  - STRESS MANAGEMENT
  - SLEEP
  - TOXINS
- REJUV 4 LIFE NUTRITION
- MEDICAL FITNESS

- BRACING
- LEVELS OF FITNESS
- PHYSICAL THERAPY
- FMS RESTORATION

- PROLOTHERAPY
- PRP
- STEM CELLS
- LUBRICATION (KNEE)

- TOPICAL CREAMS
- NERVE BLOCKS
- EPIDURALS

We clearly communicate with our patients, team and business affiliates what it takes to achieve the best results in achieving weight loss and reclaiming health. We have no problem supporting a patient who is just looking to get moving again because any positive change is a step in the right direction. However, the greatest results come from the combination of behavioral, nutritional and mindset changes. Perhaps most importantly, our value comes from integrating all our departments to create a comprehensive approach and

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patient-centered care. My acid test on how well we are doing this is what I call the “Mom Factor”.

### **The “Mom Factor”**

Jay Abraham’s book, *Getting Everything You Can Out of All You’ve Got*, is one of my favorite books of all time. He talks about the principal of being Preeminent. That for you to be successful long-term, you must be different and a leader in what you sell or provide to your market. He also speaks to being the leader in one of many categories to separate you from competitors. He teaches that you must have a Unique Selling Position (USP) that you and your team can clearly articulate to prospective patients or you will drown in a sea of mediocrity. Each patient or customer needs to be told exactly the most effective means of transformation through your services. I call it my “Mom Factor.”

My mom suffers from Lupus and heart disease along with some chronic injuries. I would be doing my mom a great disservice to not communicate and inspire her to make an investment in each area it will take to for her health to be well-off. I want her to be around to see my kids grow and be a part of our lives as long as possible. This means explaining the need for functional medicine and specific labs, personal training, health coaching, nutritional plans, regenerative therapies, and the nutraceuticals she will need to take to get the greatest benefit from our services. People who do not understand these principles typically think ‘*well, this is just asking for more money*’. It’s ok - this was my mentality at one point too.

Our personal health is our greatest asset. Most people spend money on things that won’t provide long-term happiness. We buy expensive vehicles, clothes, electronics, meals out, substances, gambling and fruitless entertainment that we would all trade in an instant when our body and health start to fail. Most people I talk to state their family is their life and everything meaningful. Without health, we risk losing what is most precious to us.

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Prevention has always been a tough sell, but I promise you that any investment now will save you ten times what it will cost you in the long run if you acquire any metabolic syndrome or autoimmune disease.

We are very sympathetic and empathetic to the patients who suffer from disease and injury. We created a model that offers hope and solutions to reverse or, at the very least, properly manage what patients have brought upon themselves. Don't get me wrong - not all disease or injury is self-imposed, but most of the problems stem from years of lifestyle choices, the environment and state of stress we live in, chemicals and toxins in foods, pharmaceuticals and genetics we carry. Our goal is to uncover the root causes to formulate and execute a plan of action that will prevent and reverse chronic disease and body degeneration.

Susan D. came to us shortly after I joined the practice. She had multiple joint replacements, was on seventeen medications to manage pain and could only move very gingerly. A woman with a zest for life and a personality you couldn't help but love was, unfortunately, on the verge of hopelessness and despair for her future due to her state of pain. She arrived at Rejuv after viewing an ad in a local magazine highlighting our medically supervised weight loss programs.

After meeting with her, I knew she needed to be with Dr. Baumgartner and have some physical therapy before we were comfortable establishing a safe and slowly progressive training program with medical oversight for her. Susan began meeting with our functional medicine provider to optimize thyroid, testosterone, estrogen, progesterone and Vitamin D levels. She was also prescribed nutraceuticals such as turmeric, magnesium, and glutamine, among others. She started following the Rejuv4Life meal plan, eating anti-inflammatory foods.

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Slowly, Christine, our MFS Manager, had her performing functional daily movements and began to incorporate resistance training and a balance program we created and later named “Levels of Fitness Training System.” In just six months, Susan lost fifty pounds. I remember vividly her coming to me with tears in her eyes proclaiming the difference Rejuv’s model made in her life. Susan expressed she had come off all but three of her medications and was re-energized with a new perspective in life. To this day, she still trains with Christine as her rock and motivation to continue becoming the best she can be. Meet Susan in the photo below (top left). We all knew at this point that we had developed the right model of healthcare. Ever since, we have worked with purpose, passion and relentless persistence to amplify this model to our community and the world.



## Medical Fitness As a Business Model

I'm going to explain what has been the most effective for us, but it does not mean you must model our formula exactly. We designed a licensing program with “The Medical Fitness

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I.M.P.A.C.T. Plan” that can fit into any medical system. Each of the principles we've learned can help any medical practice grow its income exponentially. This model will work with any clinic or hospital system after innovating the proper integration plan.

We have implemented the model as an ancillary service to increase the bottom line, patient outcomes and impact. A target/goal is imperative when starting anything new, and this was ours. When we learned how much we could aid people with this program, and how motivated and ambitious our community was about our offerings, it was time to take our model to a higher level.

After a trip to “Fitness Business Summit”, we met Bedros Keuilian. After attending Bedros’ summit, it was an effortless choice to invest in his mastermind to learn how to properly run a fitness business and learn how to effectively market the program. Soon after attending his first mastermind The Medical Fitness I.M.P.A.C.T. Plan became our number one growth factor and Unique Selling Proposition (USP).

Medical Fitness is the finest medicine. It is not only designed to maximize patient outcomes; it became an integrated system that created an extra \$1.75 million in revenue to our existing sports and orthopedic practice within a few years. Not every patient has a sports or orthopedic need right off the bat, so relying on only injured clients to come in would have been a slow way for us to grow the practice. On the other hand, today's population has a need for exercise, proper nutrition and functional medicine optimization. Due to the obesity epidemic and associated cost on society, there is a glaring emphasis on the need for medically-supervised weight loss. This program is completely different from what is offered at your local health club. Too many people looking to lose weight fear gyms, have no idea how to achieve lasting results, are worried about injury, or are too high-risk to do it alone. There are millions of fad diets out there that are causing even further damage to today’s population. That is why there is such great demand for a solid medically-supervised program like the one we have created and have proven client successes.

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Medical Fitness is easier to market than a typical medical practice. We use multiple lead generation systems, which I will cover in upcoming chapters, to interest and motivate people to schedule an initial consultation. After the consultation takes place, we recommend a program to best suit the prospect's needs. Many of our patients need to start with one-on-one training that is medically supervised. This maximizes accountability and is completely individualized. Most of our one-on-one training is a cash-based program while the medical component is covered by insurance in our model. Other locations we partnered with have a goal to operate strictly as a cash clinic.

After the initial assessment, and for those who struggle to see immediate results, we see an impact in the sports and orthopedic and functional medicine side of the practice. Almost all our patients with any risk factors start with a clinical health assessment. The office visit is typically covered through insurance if the diagnosis fits and they have risk factors requiring a pre-activity physical and evaluation. We do it this way as we do not operate as an Affordable Care Act state in Minnesota. ACA-compliant states may code this appointment differently as well as bill insurance for additional weight-loss visits.

After the preliminary lab work comes back, we determine whether the individual's hormones need balancing or whether further functional medicine labs (typically not covered by insurance) are recommended based on the exam. During the assessment and evaluation, if there are injuries present in addition to any metabolic concerns or diagnoses, we may recommend an orthopedic evaluation. At this time, we will also recommend that they see our physical therapist.

After the physical therapist makes a treatment plan, the request is made for further insurance-covered visits if necessary. All the medical services that are billed to insurance are based on recommendations in our model. For nutrition services with the dietician or for health coaching, the patient will use one of their training sessions for cash visits.

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## **The Medical Weight Loss & Restorative Health Program**

### Participant Profile:

- Body Mass Index (BMI) over 30
- Health diagnosis
- Underlying symptoms
- Chronic medication use
- Injury
- Chronic pain

The Program Length: 6 - 12 months PLUS a Lifetime Maintenance Program

### Clinical Components:

- Health Risk Assessment  
Health history
- Medication review
- Biometric measurements
- Comprehensive blood panels

### Clinical Referrals (based on individual need):

- Hormone consult
- Orthopedics
- Physical therapy
- Psychologist

### Metabolic Testing:

- What you burn:
  - Resting metabolic rate

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- Lifestyle & activity
- Exercise
- Weight loss zone
- Maintenance zone

Bio-Score (given based on a combined factors):

Internal factors -

- Total cholesterol
- HDL
- LDL
- TC/HDL ratio
- Triglycerides
- Glucose
- HbA1c

External factors -

- BMI
- Body fat %
- Waist circumference
- Blood pressure
- Smoking status

After getting the medical procedures, in many instances, our professionals clear the patients' physical capacity to get started or continue to work with them until they are ready to begin the medical fitness portion of our program. In turn, we can better serve the patients' long-term health by getting the medical care they need before getting them back to the cash-based medical fitness program with the trainers, dieticians or health coaches

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they initially sought out. In many cases, the patient may just have the metabolic test and pre-exercise physical, then be cleared to start with our MFS. In most instances, a patient will utilize and benefit by utilizing multiple services at one time.

For example, a patient may undergo rehab with a physical therapist for knee issues, but also work with a personal trainer for exercise on uninjured areas, a dietician for nutrition coaching, a health coach for support and accountability and/or a behavioral psychologist for behavioral intervention and modification. When multiple providers are involved, our focus is on communicating between departments regarding the best treatment program. It's a true team effort that pays off in better health outcomes for our patients! The result is fewer medications, less unnecessary surgery, decreased weight, decreased chronic disease, improved risk factors, increased strength, greater functionality with active daily living movements, enhanced energy, a positive outlook for the future and increased vitality.

When fitness advocates meet with a high-risk patient during an initial consultation, we ask him or her to ask the patient to get clearance or a physical from their primary doctor if they decide to forgo our medically supervised program. If they do not have one, we can refer the patient in-house for general services that their primary care physician (PCP) would normally handle. There is no concern at that point for billing for specialty services, such as sports and orthopedic injuries, or cash-based medical services, such as bio-identical hormones.

It is imperative to learn how to operate with ancillary services properly or consult with a lawyer in your state regarding the anti-kickback laws. If we recommend fitness services, we must share other options if they desire. However, we explain how our integrated approach has many distinguishable benefits.

When patients come to our clinic for an injury and our medical providers refer them to other ancillary services, we must educate the patient that we have a direct ownership

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relationship of these entities and that they could go to any of several surrounding practices we have listed as referral solutions. This way, the patient could focus on losing weight or rehab injuries on their own but, for communication purposes and the strength of our programs, it is my recommendation to work within our facilities. Because each state is different, this model is one of the first priorities we discuss with new physicians, practice owners and wellness practitioners who participate in our licensed Medical Fitness I.M.P.A.C.T. Plan.

When a potential patient who wants to lose only 15 pounds enters our facility and is not considered to be high-risk or have any orthopedic needs, in many instances, they will go directly into one of our training programs instead of the medically supervised program. During the initial consultation, we determine which program is best-suited for the patient - the medically supervised program, one-on-one training, semi-private training or boot camps. We also have multiple transformation programs. These are the most common way to gain new patients. These are marketed programs, such as our Ultimate Transformation Contest, 21 Day Metabolic Reset Program, Lose 20 Pounds in 42 Days - Free Weight Loss Challenge, New Year's Revolution, Rock Your Skinny Jeans for The Holidays, Little Black Dress Project and the list goes on.

We also provide online programs with many of the same services. We created an online "Rejuv University" system with medical provider videos that teach patients everything from anatomy, basic exercise physiology, fitness and weight loss principles, nutrition, grocery store tours, and behavioral modification. The online education system is a unique value for patients that sets us apart from any competition. Education and understanding will increase patient compliance and outcomes of any of our services.

Rejuv University has our Rejuv4Life Cookbook and meal plans. Even if a patient comes in only for injury or functional medicine, we give all our patients free access to the system to optimize outcomes, even if they do not participate in one of our training programs.

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When other clinics invest in our Licensed Medical Fitness I.M.P.A.C.T. Plan, we build out the online University platform and brand it with their clinic's name and logo, as this is our best tool and resource for reaching all our patients. Some groups have no desire to have in-house fitness programs and have solely purchased this health education platform for their clinic.

At our pinnacle of integration success, patients who came for fitness programs, we found they end up in the clinic 62% of the time for one or more services. Some of these services, such as the metabolic testing and bio-scores, are recommended to every patient. Several of the higher-reimbursing services, such as pre-exercise assessments, bio-identical hormone testing and functional labs, or orthopedic services, are used depending on patient needs.

In most cases, as patients progress through their programs, they begin to know, like, and trust us. The patient will experience, by observation, that that we truly do have their best interests at heart and, once we realize what key element is preventing them from seeing their desired results, we can make an informed recommendation for additional clinical services.

At times, it can be difficult during the first session to communicate to a new fitness patient they need every service we offer. It's a matter of time and trust before our clients and their families start seeing our medical clinic for services we offer that could benefit them. Each service we offer reflects our standards of quality care, patient-centered service and a solution for optimal clinical outcomes.

Using this system, we drastically cut marketing expenses to the orthopedic practice. Almost a third of new clinical patients are derived from being introduced to the fitness programs. Only in the last two years have we taken a greater emphasis on marketing regenerative medicine as we have had an increase in providers, successful patient transformations and

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an impressive number of patients are seeking stem cell and PRP (Platelet Rich Plasma) injections.

## **The Services We Offer**

The sample form below presents some of the integrated services that we offer. During the fitness sales process, something is usually recommended from the clinical menu, although it is further down the patient experience timeline that many of the other services are utilized. For example, if a fitness patient is struggling to see change, depending on when trust has been established, they are more open to seeing a medical provider to evaluate and assess labs to uncover why a patient may be stuck on a fat loss plateau.

Here is an example of some of the services offered when they join one of our fitness programs:

*Welcome to Rejuv Medical! As a new fitness or weight loss patient, there are many services available to you to help ensure your safety, reach your goals faster and obtain optimal health.*

- **Metabolic Testing** – *This is a resting test that determines the number of calories you burn during basic living. It calculates the caloric requirement of the body to be awake, breathe, and digest meals. From that number, we can precisely predict the number of calories needed from exercise or dietary adjustments to maintain, lose or gain weight. This test is billable to most insurance companies. Typical deductibles/co-insurance would typically apply. It is billed with CPT code 94690. Billable cost is \$128.40. If your Body Mass Index (BMI) is under 30 and there are no cardiac risk factors, it can also be done without the insurance and a 33% prompt pay discount can be applied if payment is made at time of testing. This would be a total of \$86.03.*

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- **Pre-Exercise Physical** – This is a screening visit at the Rejuv Medical Clinic with either an M.D. or a Certified Nurse Practitioner. This exam should be performed before undergoing any strenuous training or conditioning program or intense weight loss program. This is not a “complete physical,” but an examination that provides further recommendations, restrictions, and accommodations. It is not to take the place of your annual exam with your primary care provider, as the focus is screening risk factors that could be a danger to your health while performing activities that may place a higher demand on the body’s systems. From this point, the provider may order additional tests. This exam is billable to most insurance companies. Typical deductibles/co-insurance would usually apply. It is billed with CPT code 99204. Billable cost is \$283.00 to the insurance. Prompt pay discount can be applied if insurance is not being used. The fee at the time of service, with the prompt pay discount, is \$189.61.
- **Lab Testing** – The amount for labs and the CPT codes used is variable based on the findings from the provider’s initial assessment. These labs are used to screen for medical factors that could affect weight loss and/or to screen for risk factors associated with obesity or high-end training. If there are questions about insurance coverage for specific labs, ask and we can get the codes for you to use to call your insurance company before having blood drawn.
- **EKG** – Also known as an electrocardiogram, this test uses pads on the torso, arms and legs to measure the electrical activity of the heart. It is helpful in reviewing potential heart issues. This test may be recommended based on the American Academy of Cardiology Guidelines for pre-exercise screening. It bills to the insurance company with the CPT code 93000. Billable cost is \$190.00. Prompt pay discount can be applied if

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*insurance is not being used. The rate, with prompt pay discount at the time of service, is \$127.30.*

- ***Stress Test*** – *Depends on medical referral.*
- ***Dietician/Health Coaching/Behavioral Psychologist*** – *Depends on type and insurance provider. Doctor referral needed. Cash option is usable at any time in replacement of a training session or at \$50 for 30-minute coaching session.*
- ***Physical Therapy*** – *Depends on medical referral*
- ***ALCAT or LEAP Food Sensitivity Testing*** – *Referral needed*
- ***Exercise Physiologist*** – *Depends on medical referral*
- ***Hormone Testing*** – *Depends on insurance and labs selected*
- ***Orthopedic or Sports Medicine Services*** – *Joel Baumgartner, M.D., and his team of non-surgical Orthopedic physicians use the latest technology in Regenerative Medicine and Orthopedics to get your pain, injuries or arthritis issues resolved so you can live the life you deserve. They do NOT believe in Band-Aid medicine!*

*Most of these services can be billed to your private health insurance or Medicare. Please call the insurance company (the 800 number is usually on the back of your insurance card) to verify Rejuv Medical is in network and to determine your deductible amounts and your level of co-insurance or co-pay. \**

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The system also works vice-versa. If we are treating a patient for orthopedic needs, the providers will recommend utilization of our programs to exercise properly from a preventive standpoint once they have been cleared from physical therapy. If one of our patients is tired and fatigued from their hormones being out of balance, they can benefit from learning to eat properly and exercise.

Our goal is to be the one-stop shop that is literally changing thousands of lives by steering our patients in the right direction and creating permanent changes in their health and reversing chronic disease, as opposed to a supplement store, a gym, or any other professional who doesn't have the best tools to help their patients. If a patient enters our clinic first, we always provide each patient access to Rejuv University and a free medical fitness test drive for additional support, accountability, and customized guidance based off the first two evaluations.

Following is what our patients receive to access Rejuv University.

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## Medical Fitness Wellness Program

How to access Rejuv University:

[www.RejuvUniversity.com](http://www.RejuvUniversity.com)

Username: guest

Password: changemylife



320.217.8480 | [www.RejuvMedical.com](http://www.RejuvMedical.com)

## Medical Fitness Test Drive

### ☀ 2 Week Free Pass Includes:

- Infrared Sauna
- Studio Classes
- Open Gym Access
- Educational Seminars
- Childcare
- Towel Service

### ☀ Health Assessment

### ☀ Functional Movement Screening

### ☀ Customized Medical Fitness Sessions



Most facilities that have implemented The Medical Fitness I.M.P.A.C.T. Plan have the potential to add an additional \$100,000 in revenue the first year from fitness programs.

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The only requirement to begin is a small room, an “Implementer” and “The Medical Fitness I.M.P.A.C.T. Plan” to save time and to get it right. By using what we know now, you can easily duplicate our system and create consistent and predictable profits much faster than we did when finding the right “Implementer”. By embracing this mission, you can positively enhance thousands of lives, which has been our dream and vision all along.

This plan is designed to add additional patients to the practice with minimal time, overhead, investment, and risk when done the right way. The following chapters will dive deep into how to “get it right”. The best part is that it’s not completely dependent on the medical provider’s time. That said, you will need either a physician, nurse practitioner, physical therapist, or chiropractor once the charge provider can no longer see additional patients, or when you are ready to set your business on autopilot and simply watch it grow.

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## Chapter 3: Marketing and Enrolling Is the Secret Sauce

**“Stop selling and start helping.” ~ Zig Ziglar**

A common pattern of destruction I see is that many medical practices and business owners are trying to be everything to everyone. When you do this, it's difficult to create an emotional connection and response with the prospect you are trying to “enroll” and help. When you cast a net that is too large, your message becomes diluted and your personal connection suffers.

It is vital to embrace the definition of a ‘niche’. A niche is a narrowly-defined market that has needs which are not being met by a mainstream product or service. It's about dispensing advice by experience and working to go beyond being average for everyone, but to being superior for the right target audience in in your niche. By narrowing your niche, you add value by being the best solution provider for your target market. If you can't be in the top percentile of what you offer, it's very difficult to separate your practice from the competition. We believe we have the top non-surgical and medical fitness-integrated clinics in the world; therefore, it is our obligation to market and connect with those in need of what we deliver.

At our practice and within our fitness facility, we have multiple services - but we don't market all our services to everyone. For our fitness services, we market directly to females between the ages of 35-55 who want to lose weight and get healthy again. Our marketing highlights our medically-integrated platform that maximizes results and safe progression. We do not market to body builders, powerlifters, or children. In our boot camps, we market to women between the ages of 25-40 who want to look and feel great and who are looking

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for a supportive community that is like a second home to them. We call that the “Cheers of Fitness”.

We have athletic programs as well, but they are not the core focus. That said, each of our fitness offerings can be maximized using our medically-integrated services, so we never lose sight of medical integration as our marketing differentiator. We must separate ourselves from the 100 other gyms and private studios who do not have the expertise to effectively deliver results and offer the same level of education.

With our orthopedic clinic, we educate patients about our C.F.A.N. process that includes nutrition and fitness, which distinguishes us from any other clinic in Minnesota. Our promise is we can help transform those who suffer from disease and degeneration while looking to avoid surgery and ‘cover-up’ medicines (that mask the cause vs. treat it) Again, no one currently else has the same services, expertise and systems we do. While everyone can claim they are the best, and people are attracted to new and different because of those claims, what makes you stand out in terms of delivering results will be the necessary key to sustainable success.

### **Know Your Niche Audience**

You must know everything about the niche, or target audience, you’re trying to attract and help. This includes knowing where they eat, where they shop, what cars they drive, where they hang out, what groups they associate with, their habits, motivations, dreams, incomes they earn, what type of households they have, where they live, problems they have, whether they can afford you, their biggest fears and desires. You need to be able to speak to your niche in their language. What are their hot buttons that inspire action?

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Once you have the opportunity to speak to them, you will need to be able to relate to the target group as an understanding member, not as a foreign diplomat. Unfortunately, when many physicians try to market, speak or connect through social media, they lose people with science. We are not trying to educate other doctors but, instead, to inspire and speak to people at their level and transformational desire. Once you know everything about your prospect - and you understand them - you can create the most effective marketing campaigns.

After defining your niche market, you will experience cost-effectiveness. What that means is you no longer need to send out 50,000 direct mail pieces to try and capture just ten new patients. Once you narrow your target market, you can send out 1,000 pieces and get the same return. It's the difference between a searchlight and a laser beam - you only want to share the right amount of energy to get directly to the people you are looking to work with in your practice.

To really bring this home, why would you want to advertise your services to a niche market over a mass market? In other words, why would you want to target a smaller segment of your community over the entire community? Simply put, it's more effective, less costly and produces better results.

Before you start burning your cash for marketing efforts that may or may not be effective, it is imperative you plan your marketing strategy. The first thing that should be listed in your plan is the type and size of your niche audience and the marketing vehicles you will use to capture their attention.

Once you have defined your target market, it is vital to formulate a marketing plan. Too often when I start working with practices, I discover that many have never have taken the

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time to get their marketing dialed in before executing on it. There is a simple solution that I have used, as well as my clients, with great success.

Here are the three questions I would ask myself each Sunday night before we hired a team of experts.

*1) What am I actively doing to get more patients each week?*

*2) What do I do to retain our patients, get them results, turn them into long-term patients and raving fans?*

Yes, I do want our patients to not need us for acute or chronic conditions if we provide great care; however, all of us can benefit from long-term prevention and health optimization. It is important to know the difference between a one-time patient and a long-term patient. A one-time patient is someone who bought from you for one time or on a short-term solution. A long-term patient is someone under your care and protection; it's a relationship that goes beyond a single transaction. Most practices I start working with have no idea of the lifecycle of a patient, the average visits per referral, or average monetary value per patient, which makes it very difficult to understand what to invest to attract new patients.

*3) What value can I add to my circle of influence, patients, team, family, friends, community and affiliates?*

We must get results or add value to our current relationships. I call this relationship marketing, which is far more effective, affordable and how to build a tribe of raving fans who refer their circle of influence to you. It's less about how well we have marketed or how much we have spent in marketing, and more about our relationships that have led to our success today.

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After you understand these three concepts, you can dive into formulating your plan but, without the preceding, your attempts will fall short of the potential value and benefit you can add to your community. If your product or service adds value to people, you are doing the public a disservice by not learning how to market it ethically and effectively.

## **Seven Key Factors to Your Marketing Plan**

There are seven key factors to successfully setting up your marketing plan as follows.

### **1) Find, define and then dominate your niche audience.**

Typically, successful practice owners view themselves as a specialist and not a generalist. Niche yourself down. Become the expert. Go narrow and deep with a mindset to lead your niche audience to the results they want.

### **2) Figure out your USP (unique selling proposition).**

Why you instead of someone else? Think of all the alternatives people have for medical services in your community. Why should they choose you and not your competitor? What makes you unique, different and better? How can you communicate that message in your marketing as a derivative of the transformation you are providing? It's not about what you offer but about what's in it for your potential clients. What visuals can you create so your process makes sense to your team, patients and prospective clients?

### **3) Become a local celebrity and the face of your practice by telling YOUR story.**

Everyone has a story and your story is unique to you. Most physicians don't tell their personal story and their 'why' reason for doing what they do. The personal story is relatable, making you human, and is what will attract and allow people to connect with

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your mission more than any other marking factor.

#### **4) Systematize everything!**

Have a step-by-step process so that your business can run without you, as the physician, being in it. The most successful practices have owners or team members who work on the business and not just in it. This is the only way you can create time freedom and replicate how you provide services. Your plan must be well-documented, communicated and practiced by all.

#### **5) Market your practice differently than your competition.**

Utilize Facebook, YouTube, Snapchat, Instagram, Twitter, email and your website to market your practice differently than everyone else. Regular videos multiple times a week give your community a "peek" into the operations and community you've built as well as the patient results you've delivered. Too many medical professionals are complaining about people getting rich in the online medical industry, pushing out what they consider bad content; meanwhile, they themselves are producing zero content. Almost as bad, they are communicating content that only appeals to other medical professionals and not the actual prospective patients. Creating great content on today's social media/online space is the fastest way to build the KNOW, LIKE and TRUST factor.

#### **6) Your website is your salesperson.**

Once you drive traffic and leads to your website, your site must be able to communicate the transformation your services deliver. Your site needs to educate, entertain, provide social proof and, ultimately, capture people who visit so you can start nurturing the leads. Too many people give up after the first visit or follow-up but, if you stay in front of people with great content, you will meet their needs when the time is right for them. Follow up digitally and on the phone - relentlessly - for maximum success. No, I'm not talking about calling

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people if they tell you to stop. I'm talking about caring more than they do now until they are ready to commit to the change they want.

### **7) Culture + community + results = the "magic potion" of your business.**

The "magic potion" is what leads patients to becoming raving fans who are referral-giving machines. Your job is to make your patients and team evangelical about your product and services, so they tell everyone about you! Besides, it's hard for people to share their achievement without mentioning how they got it. Remember, this does not happen overnight but can be executed with the right long-term strategy.

### **3 Factors to Have in Place Before Investing in Marketing**

Here are three factors to have in place before investing in your marketing plan.

#### *1) How much should you invest in marketing?*

The answer to this question depends whether you are already established or just beginning your business. Your advertising budget should fall somewhere between 3-9% of your gross revenue. In my first years of starting the fitness side of the practice, the budget was around 13%. We lacked any formal marketing plan. I was throwing out tons of money, not tracking returns, and was waiting for prospects to come in the door. While we were able to gain some traffic, we overspent in many areas.

#### *2) How are you going to track your return on investment (ROI)?*

At a minimum, you should get a 2-to-1 return on investment on all your marketing dollars. Today, I require nearly a 3-to-1 ratio on our paid marketing pieces to continue the ad spend. If it is short of this return, I know something needs to be changed, such as the

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message, the headline, the marketing funnel, offer or the advertising medium. For this reason, it is important to test and track your results.

For example, you can test two separate direct mail pieces to a small sample of your target market and see what piece gets you the most leads. You can use two different phone numbers to track the results. Use two different Facebook ads to the same program to see which one generates better results with more interest.

**HOW HAVE YOU HEARD ABOUT US?**

PROFESSIONAL REFERRAL

- PHYSICIAN / NURSE
- CHIROPRACTOR
- COSMETIC DOCTOR
- HOMEOPATHIC
- NEWCOMERS SERVICE
- ATHLETIC TRAINER/COACH
- FRIEND / FAMILY MEMBER

HOME BOOK

- DEX BOOK
- YELLOW BOOK
- BIRCH MIDBOOK

DIRECT MAIL ITEM

- POST CARD / FLYER
- PROMOPAK
- COUPON BOOK
- COUPON MAGAZINE

RADIO ADVERTISEMENT

- WILD COUNTRY 99
- LITE 99.9
- 104.7 WCLD
- MIX 94.9
- AM1240 WJON
- 98.1 COUNTRY
- SPIRIT 92.9
- BOB FM 105.5
- KASM RADIO

MAGAZINE AD

- BRIGHT SIDE OF 50
- CENTRAL WOMEN
- CHICKS
- STYLE

NETWORKING GROUP

- CHAMBER
- BNI GROUP
- BRG GROUP
- MWBBC GROUP

INTERNET ADVERTISEMENT

- GOOGLE / SEARCH
- FACEBOOK / SOCIAL SITE
- YOUTUBE

BILLBOARD

- NEWSPAPER
- SPORTS PROGRAM
- PRIZE BOX AT A BUSINESS
- EXPO / TRADE SHOW
- WHICH?

**Totals Tab Auto Calculates Your Advertising Budget Based On ROI.**

Simply enter the number of leads earned into the Calculator and Adjust the Dollar value of a new patient and it will show you your Estimated Ad Budget. In this example: Radio delivered 110 new patients to the clinic. Estimated Revenue from one New Patient is \$1,500. Therefore, Radio should only invest \$27,500 / year on Radio Ads to have a 5 to 1 ROI, or \$55,000 to have a 3 to 1 ROI.

Totals Auto Calculate through all the Tabs.

### 3) What will you do with your leads?

Marketing is just one piece of the bigger picture when it comes to getting new patients. Simply put, marketing attracts leads to your business and express interest in what you're offering. For many practices, they can generate leads, but the next step is what to do with those leads. Unfortunately, too many critical leads get lost in the mix and there is very little,

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if any, follow-up. If this is the case, you're lacking a lead nurturing system. We will dive deeper into this topic in the Automation Chapter later in this book.

Having multiple marketing funnels will spread your message and may connect with someone who might not have received it in another medium. Personally, I could be a great prospect for a company, but I would never find their ad in a newspaper or on television because I don't read the news or watch TV. Your prospect might hear a radio ad, see you in the newspaper, have a friend who uses your service, but it was the direct mail piece that got them in the door. That's called the 'force multipliers' of marketing. For this reason, it's difficult to get 100% accurate results in tracking one medium, but all your messages together can be used to leverage your results.

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A	B	C	D	E	F
Month	January				
Week	1st	2nd	3rd	4th	
Trends	College Students Return, Cold Weather	Snow Sports, Ice Man Events	Martin Luther King		
Email Marketing					
Radio					
Press Release					
Video Post					
SEO					
Social Media					
Blog Post					
Web Develop					
Direct Mail					
Joint Ventures					
Events					
Trade Shows					

In my experience, it will be one message that finally brings the prospective client or patient to you. The simple checkboxes on your intake form can show you your greatest return on investment. If you're not tracking or testing, it's imperative that you start now to make the most of your marketing investments.

Most practices and businesses will run newspaper ads, print flyers, use pay per click campaigns, radio spots, and create websites that all cost loads of money. Some completely fail to get a 2-to-1 return on investment in these high-cost mediums. This is exactly how we

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started. Another mistake practices make is to not invest more in what's working when they are getting a good return. If I put two dollars in to a slot machine and four dollars comes out each time, I would keep pumping money into it. I'm going back to that machine repeatedly. The same should hold true for the marketing initiatives that are working for you.

Initially, many practices we work with wonder why their advertising and marketing campaigns are unsuccessful at bringing in the amount of traffic they expect. I learned the key to marketing is to get the maximum number of prospects to KNOW, LIKE, and TRUST you. Once consumers hold you in this regard, you have more people willing to trade their money for your services than you would have ever dreamed.

Before you start implementing paid marketing mediums, you must first start the free and most effective methods for creating likeability and trust. Many successful individuals I have spoken with feel traditional marketing has passed its time and that the key for most local practices is relationship marketing. Our focus has dramatically changed to any medium that allows us to provide content and connect with our prospects. We still pay for radio, but only as the medical and fitness expert on radio stations, or with celebrity endorsements who have had great results with our regenerative services. On the weekly radio show we host, we provide value by offering advice on how to make healthy changes, address fears, desires, hope, myths, tell our story and close by leading listeners to our website.

Too many practices are trying to brand themselves like they are a big household-name brand. Many are looking only where everybody else is marketing and doing the same types of ads, and in the same places. *"My competition is in this magazine so I have to be too."* To stand out today, most of your marketing dollars should be spent while building a relationship with your community and current patient base. This type of marketing will position you as the go-to source in your region.

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For the last nine years we've invested heavily in our marketing and sales infrastructure. As a result, we have had massive growth due to dialing in our systems for marketing, operations, communications, as well as our management and leadership skills. These have been the best financial decisions we could have made to grow our business. Without the help and guidance of other successful business owners as mentors, it would've taken many years of financial struggle along with trial and error (most likely intense trial!). I'm not sure we would have survived through our trying years without the support and systems we received from each of our coaches and consultants.

In the beginning, out of all our paid advertisements, only radio was providing a return on investment. We trained a well-known local DJ who lost 75 pounds in eight months on our program. She spoke about her experience on the radio and shared blog posts as well. That was very successful at providing a ton of new leads. If you're looking to utilize paid advertising, this is one method I'd strongly urge you to consider.

Because of the great success we had with radio, we tried the same with other DJs. But after two or three months, they would fizzle out and not get long-lasting results. They simply liked the free training. Realizing it wasn't good for us, we had to come up with a different system for celebrity endorsements. Now we will take on new endorsement deals, but they must successfully complete six months of training or see clinical success before we decide to do any advertising with them.

At the time, I couldn't understand why all our other marketing didn't have the same return on investment as radio. Within months of the mastermind coaching program, we quickly realized that we were just selling features of our program rather than the transformation we help create, the benefits to our patients and the story behind our care. Our ads would have information such as: *"We provide metabolic testing," "The program is medically supervised by a doctor," "We do grocery shopping tours, cooking classes, bio-identical*

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*hormones and regenerative procedures.*” As we mentioned earlier in the chapter, you can’t be everything to everyone without a defined storyboard. Facts tell, stories sell. Remembering this one rule will leave a meaningful impression and set the necessary tone: any marketing or content piece must state the transformation your service or product provides to your ideal clients.

## **8 Elements of Direct Response Marketing**

Businesses spend an astronomical amount of money on fancy websites that have a generous amount of information and look pretty. That’s great but, typically, they are not successful because they are not pushing emotional hot buttons, they don’t have an irresistible offer, they don’t provide social proof and they fail to call the prospect to action through education and nurturing sequences. That’s great that you can help everyone, and you have three degrees, and six different programs, and the best equipment. Logic would say you need all that, but the reality is that people are seeking you for a pain they want solved. They want solutions - not science and information.

Most medical practices that are successful with advertising and marketing are using the “star, story, solution” method along with social media and email marketing. You will market your clinic in this regard but, with your medical fitness practice, you will use the eight important elements listed below in all your print and audio campaigns. This type of marketing is called “direct response marketing.” With the eight elements below, your ideal potential clients are led to a clearly-defined desired action.

**1) The headline** - You must capture the attention of your audience.

Example: Lose 20 pounds in 42 days - a free weight loss challenge.

**2) An irresistible offer** - This is what a prospect will get for taking action.

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Example: Normally \$499, but yours for free when successfully completing the challenge.

### **3) The science or reason behind your irresistible offer.**

Example: This program is an exchange with you sharing your story, so we can help more people like you who can benefit from a medical fitness program.

**4) Your USP (Unique Selling Position)** – something that separates you from all the rest of the competitive field, whether that's a money-back guarantee, medical fitness, experts on staff or something else.

Examples:

- The only medically-supervised program in the area with medically-integrated services to maximize your transformation and progress you safely based on your internal and external bio-score.
- Medically-tested and proven methods to help you lose weight the right way.

**5) Social proof** - The more testimonials, case studies and success stories you have, the better.

Example: Look at these clients' before and after pictures.

**6) Create scarcity or urgency that leads the prospect to immediate action.**

Example: We only have 20 spots available.

**7) The bullet points of benefits and transformation clients will get from your offer.**

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Examples:

- Not only will you lose weight and have more energy, you will get a done-for-you meal plan and tools that save you thought and time.
- Discover the secrets of your metabolism and why your past diet and exercise plans have failed you. (Bonus: this one also neutralizes the self-blame, shame and guilt.)

### **8) A strong call to action with clear direction on what you want the prospect to do next.**

Whether it be to go to your web page, call to sign up for a seminar, consultation or office visit, or experience a trial period, you want to create a breadcrumb trail that leads to working together (if that's the right solution for the client).

Example: Enter your email in the box and reserve your spot for the orientation today - offer ends XX/XX/XXXX.

## **Making Your Marketing Efforts Work**

There are multiple types of marketing and advertising mediums that could be a focal point. Whether it's paid or free marketing and advertising, you need several different marketing funnels to best reach your target market. Each medium can bring you more leads and prospects. More leads equal more clients and patients when you have your backend automation in place.

Each of your mediums must have purpose and be strategically used - and measured - to determine effectiveness. Focus on relationship and content marketing digitally before

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investing in traditional and paid advertising mediums. Many businesses start investing all their efforts in paid advertisements before researching the overlooked, more important, more effective, and much more affordable relationship and content marketing strategies. This is because every advertiser will tell you how their medium is perfect for you and that you will miss out if you don't take advantage of their service. It's also done for you and requires no work, so it can be alluring.

Print marketers pray you'll just hand over money and accept the first idea they come up with so they can move on to finding more business. They also hope you don't track your efforts because they can make sense of your dollars instead of using true data. They will make claims that your competitors are there and that it works great for them.

If you are not obtaining an impressive return, they will tell you it takes time and you should add to your frequency. As you are paying for advertising, I ask you to consider hiring an in-house marketing and sales manager to spend all their efforts on tracking, making compelling copy, creating new business, growing community relationships and using free content marketing opportunities before paying for any outside advertising.

The goal is to create as many force multipliers as possible. We do this by having several effective marketing funnels all working to get our focused marketing message to our target market.

Many physicians and business owners fail to determine whether their marketing is successful because they lack a system, the staff support to do so, or do not know how simple it can truly be - the truth of it is that there is not much to it.

This chapter is about is stepping outside your comfort zone and not attempting an easy road as a fast path to cash. Offline marketing takes work but it's - by far - the most important of all marketing strategies to build your relationship in the community. It's easy

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to have the newspaper and radio station craft you an ad and you're done. Not only will that probably be the least effective advertising, it's also the most expensive. You must do the free stuff which means getting out in the community including, but not limited to, speaking, writing and sharing video content every chance you get, using social media, participating in joint ventures, attending chamber meetings, doing grocery store tours, offering referral generation systems, and hosting transformation contests.

The online marketing and paid tools can be extremely effective as well, but I have seen many owners and managers get too comfortable sitting behind the computer. Funnels like Facebook, SEO, Pay Per Click, Craigslist, email marketing, and having an effective website are significant to your success. The key is finding models that will work for you.

Take the time to make a system or follow ours to avoid running around doing everything half-heartedly. You need to combine both online and offline methods, free and paid advertising, and pump money into the things that work well for you at building relationships and building trust. This is a long-term approach that needs time and resources invested to make your marketing work well.

No matter what funnel you use, your marketing message must explain why your practice exists and share your story. It's a crowded marketplace and you need a reason for people to want to be part of your cause. Your message needs to speak to the prospect. If they know your "why," it will be easier to build a relationship with your prospects and patients. As a medical fitness facility and a medical practice, you can become incredibly successful not only financially, but in your ability to change lives for the better. However, your practice will be a commodity if you fail to build strong relationships with your team, patients, and prospects. If you become a commodity, then you're forced to compete on price and that's the race to failure.

Once people know your "why" and know you are invested into building relationships, the best marketing will come in the form of content. Not only will you be doing what your

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competitors are not, but content marketing is a proven marketing technique where you create and distribute relevant and valuable content to attract, acquire, and engage a clearly defined and understood target audience. Basically, content marketing is the art of communicating with your customers and prospects without selling. It is non-intrusive marketing because instead of pitching and hard-selling your products or services, you are delivering information that makes your prospect more intelligent. People do not want to be sold but they do like to learn.

The essence of this content strategy is the belief that when we, as businesses, deliver consistent, ongoing, valuable, relevant, practical information to potential patients, they ultimately reward us with their business and loyalty. Consumers have ceased to respond to the traditional world of marketing.

Today, many prospects own DVRs to skip television advertising, ignore magazine and newspaper advertising, stream music online or listen to Pandora to miss the commercials, and now have become so proficient at online "surfing" that they can take in online information while ignoring pop-ups, banners, or buttons. In today's digital economy, traditional marketing is just not the way to be successful; personally, I believe this has been proven. The good thing is you can save a lot of money by not falling victim to traditional forms of advertising.

You can create marketing content that is anticipated and truly makes a connection! You can develop and execute "sales" messages that are needed, even requested, by your potential patients. Content marketing is a distant memory from the "in your face" marketing we have traditionally been bombarded with every minute of every day. Content marketing is success for the present and the future.

However, I do not recommend hiding behind the computer to create content. Instead, most of your time should be spent on "Why Marketing" (mission) and "Relationship Marketing"

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(connections). You can easily outsource most of the "Content Creation" (advice and information storytelling) to copywriters, and funnel-building and/or automation experts if you don't have time. I love to write and speak so it is not a barrier for me, although making it a daily priority is a constant time management necessity. Any time I have fallen off as a result of fighting fires and getting too deep into the day-to-day, growth takes a back seat.

To make multiple funnels work, it's crucial to use the marketing calendar presented earlier. It has all the mediums at the top and makes sure you are effectively planning and making your efforts work together. The difference between acting early versus reacting is critical to the implementation and success of all your efforts.

When you accomplish this, you will have more opportunities for a sale, promotion, or events. It's important to plan three to four months in advance or, as has been proven time and time again, you will be too late to reap the rewards from your hard work.

Take the 5 Pillars of Practice Success Assessment to gauge where you stack up in your marketing efforts.

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## Chapter 4: Personal & Personnel: The Driving Forces

**"Individual commitment to a group effort - that is what makes a team work, a company work, a society work, a civilization work." ~ Vince Lombardi**

Rather than asking why so many small businesses fail, we find more value in defining what it is that makes the top businesses in America so successful. One thing is very certain - it's not luck. Success begins with the owner, their vision and their abilities. From there, successful businesses must have a clear structure and leadership chain throughout the organization. This was something our own organization delayed in positioning, despite knowing how critical these two components are in creating success. By trial and error, it became crystal clear the two primary components were required and, until we conformed to that insight, we experienced numerous problems on multiple levels. It has not been the effort of one person that has built a winning practice, but a collaboration of many team members working together for a common goal.

There is a formula for everything in the business world; within that, every successful business has their own unique ingredients. You have every single capability that successful businesses have - recognizing that is an important key to realizing the dream can happen. In fact, you've got better access to information today than many ultra-successful people and businesses do. You don't have to reinvent the wheel, but most owners and managers must grow as leaders to have a winning formula. Follow the footsteps of some of the most persistent, hard-working, and passionate leaders and companies in the world. I make sure to surround myself with successful people. A few traits they have acquired remain common among all successful people - the courage of a lion, a healthy mindset, physical health, and ability to lead or inspire followers.

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It takes heart to realize that you deserve more, that you must step outside your comfort zone, be willing to do whatever it takes, make decisions that others won't, have the conversations that need to be had, be willing to take risks, deal with fear and uncertainty and to have the bravery to take daily action.

I can't provide you with heart. I cannot force you to be an action taker or instill a good work ethic or force you to grow as a person. What I can give you is access to the tools, tactics, resources, action steps, systems, strategies, ideas and inspiration to make you and your medical fitness practice a colossal success. Once you are overcome with the passion to do what it takes, the next step is making sure you have the right mindset for success. Unlike heart, you can be taught to acquire the right mindset. Leadership and proper communication takes courage and practice, but anyone can learn these skills - I'm living proof.

Do you have the right mindset to be successful? Is there logic for every decision that is made? Mindset means doing everything to make your dreams and vision a reality and knowing you can make it happen. When you have the right mindset, you can weed out anything that does not fit with your core values and desire to make your vision come to life.

Will you do everything it takes? There is no plan B approach philosophy. Do you have a mind of abundance or scarcity? Will there be enough patients for you to help? Can a competitor really stop you if you do what you do best? Do you fully understand that you are the only thing that stands in your way of success? That it's not the economy, our current medical system or lack of capable people to help you - but your own mindset that limits you? Do you believe - without a shadow of a doubt - that you can be successful and were born to have a lasting impact? You must think like a champion to be a champion.

I have removed myself from all the negativity, drama and limited thinking that had previously prevented me from moving forward in my early years. You must surround your

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staff and yourself with pure positivity and forward thinking. Many entrepreneurs don't have what it takes mentally to survive the business world. They're limited in belief - the glass ceiling stops them from reaching their full potential. It is our thoughts and opinions that get in the way of being truly successful in life. What I've learned is how to separate fact from fiction, opinions and beliefs from facts, and how to truly get over any mental hurdles that stand in the way. And that is how we coach many entrepreneurs. You can make your income and impact exponential, instead of linear, when you learn how to acquire the right mindset.

### **Acquiring the Right Mindset**

In one of my very first coaching masterminds, I was told to buy an audio of *The New Version of Psycho Cybernetics* by Max Maxwell. It was instrumental in preparing me for success in our practice. When taking new leaps, such as with this program, we are always faced with fear and doubt. Again, those are opinions versus facts. We must learn to embrace our dreams, passions, and visions in our mind with a clear-cut path on how to obtain and execute to reach them. Likely you have heard of goal setting - that will be a big part of getting this program started.

Oftentimes, entrepreneurs do not understand their gaps or weaknesses. They fail to hire people to do to what they can't or won't, if their ego is too big for them to change how they are perceived or operate. Low self-awareness or asking 'yes' people versus true introspection and/or listening to someone who will share truthful dialog about blind spots is a limiter of potentially epic proportions. The vision in your success lies in what you must change personally and who you surround yourself with who are better than you in your weaknesses. To be successful, harness a team that is productive and passionate about working in their area of genius.

Investing time and money into resources that will educate you and your team in growing your practice will be a requirement. I will always pay for high-level coaching until I have

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learned what I need from that expert, then move to the next person who can continue to move me forward with even more know-how. You need to do that as well. Why? Because you don't know what you don't know.

If you think you know it all, you have an eventual barrier to success. You cannot grow beyond your own certainty. Investing in education and training is something you should do for yourself and for your team. How can you coach others to change their life if you are not receiving coaching?

Personally, I spend an hour each day educating myself with new books, audios or webinars. Below are some of the important books I have read to help me learn many of the essential tools to build a successful medical practice and licensing and consulting business. Thirty minutes are set aside to read leading-edge medical resources and journals to help grow my business skills. The other thirty minutes each day is invested in learning how to be a better person and leader.

Following are some of the more significant business books that will help accelerate the learning curve for both you and your employees. I often request that my team read some of the books directly associated with their position. I ask my Assistant Sales Manager to read all the best sales-related books (and/or listen to audios). This way they learn to become an expert in their position and we have the same knowledge (or, at least, exposure to the same content) for ease of relating. The books you see below are my favorites that I found worth reading and should be added to your business library. Obviously, don't feel as though you must read all these at one time; read one book before moving on to the next.

- *E-Myth* - Michael Gerber
- *Getting Everything Out of All You Got* - Jay Abraham
- *Mastermind Marketing System* - Jay Abraham
- *Turning Pro* – Steven Pressfield
- *Awaken the Giant Within* - Anthony Robbins

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- *Psycho Cybernetics* - Dan Kennedy/Max Maxwell
- *Start with Why* – Simon Sinek
- *From Good to Great* – Jim Collins
- *Traction*-Gino Wickman
- *How to be a Great Boss*- Gino Wickman
- *The Secret* – Rhonda Byrne
- *Customer Satisfaction is Worthless; Customer Loyalty is Priceless* - Jeffrey Gitomer
- *Think and Grow Rich* - Napoleon Hill
- *How to Win Friends and Influence People* - Dale Carnegie
- *Yes, Attitude* – Jeffrey Gitomer
- *The Psychology of Selling Program* - Brian Tracy
- *Delivering Happiness* – Tony Hsieh
- *Built to Last* - Jim Collins
- *The Seven Habits of Highly Effective People* - Stephen Covey
- *The Art of Closing Any Deal* - James Pickens
- *Creativity, Inc.* - Ed Catmull
- *The Soul of Leadership* - Deepak Chopra
- *Pure Genius* – Dan Sullivan
- *Ultimate Sales Letter* - Dan Kennedy
- *Killing Sacred Cows* - Garrett Gunderson
- *How to Master the Art of Selling* - Tom Hopkins
- *Low Profile Selling* - Tom Hopkins
- *Influence* - Robert Cialdini
- *Multiple Streams of Income* - Robert G. Allen
- *Cracking the Millionaire Code* - Robert G. Allen
- *The Tipping Point* - Malcolm Gladwell
- *No B.S. Local Grass Root Marketing* - Dan Kennedy
- *The Go Giver* - Bob Burg/John David Mann
- *How to Develop Self-Confidence & Influence People by Public Speaking* – Dale Carnegie
- *Making a Habit of Success* - Mack Douglas
- *Feel the Fear and Do It Anyway* - Susan Jeffers
- *The Energy Bus* – Jon Gordon
- *The Automatic Millionaire* - David Bach

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- *The 5 Temptations of a CEO* – Patrick Lencioni
- *Ready, Fire, Aim* - Michael Masterson
- *Grouped* - Paul Adams
- *Richest Man in Babylon* - George S. Clason
- *SEO for 2012* - Sean Odom/Lynell Allison
- *Emotional Intelligence* - Daniel Goleman
- *The Innovators Dilemma* – Clayton Christensen
- *No B.S. Marketing to the Affluent* - Dan Kennedy
- *The Art of Strategy* - Avinash Dixit
- *Secrets of the Millionaire Mind* - T. Harv Eker
- *21 Irrefutable Laws of Leadership* - John C Maxwell
- *Competing for the Future* - Gary Hamel and C.K. Prahalad
- *How to Speak Like A Pro* - Leon Fletcher
- *The Art of Selling Fitness* – Bedros Keuilian
- *Flirting for Success* - Jill Spiegel
- *6 Sigma* - Neil DeCarlo
- *The Ultimate Blueprint for an Insanely Successful Business* - Keith Cunningham
- *Predictably Irrational* - Dan Ariely
- *Fitness Launch Formula* – Brian Devlin
- *The Carrot Principle* - Adrian Gostick/Chester Elton
- *Jack Straight from The Gut* – Jack Welch
- *Kiss That Frog* - Brian Tracy
- *The \$100 Startup* - Chris Guillebeau
- *Results That Last* – Quint Studer
- *Triggers* – Marshall Goldsmith
- *Love Yourself Like Your Life Depends on It* - Kamal Ravikant
- *No B.S. Ruthless Management of People and Profits* - Dan Kennedy
- *Teaching to Change Lives* – Dr. Howard Hendricks
- *The Alchemist* - Paulo Coelho
- *Expert Answers 95 Practice Management Questions* – Mary Mourar
- *Change Your Brain, Change Your Life* - Daniel G. Amen
- *The Entrepreneurial Crisis* – Erik Rokeach
- *Flow* - Michaly Csikszentmihaly
- *Positive Psychology Coaching* - Robert Biswas-Diener
- *The 22 Immutable Laws of Marketing* - Al Ries/Jack Trout

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- *The Man in The Mirror* – Patrick Morley
- *The Strangest Secret* - Earl Nightingale
- *The 5 Dysfunctions of a Team* - Patrick Lencioni
- *The 10x Rule* – Grant Cardone

Acquiring the dream will demand your employees' diligent commitment and passion alongside digging their heels in and taking personal accountability for their action items. Each day you can improve your practice and be the leader in your niche. It is extremely important that all your employees have the right mindset and buy into your vision from the start. Wrong team, no dream.

### **Creating a Winning Team**

You and your team's ability to lead and develop the practice is the driving force of your success. When you put in the right processes to help grow your team and determine whether they are right for the job you hired them to do, you will achieve success much faster. It all starts with how you interview, having clear job descriptions, clear expectations and metrics for tracking success. Frequent meetings in the beginning to provide feedback on performance and give training to become better will yield compounded results over time, as well as amazing two-way and team communication.

You may have heard that people don't leave their jobs - they leave their managers. I'm not talking micro-management. I'm talking about creating a culture of excellence, accountability and growth potential when it is the right fit. Team members who are versatile in times of change and resilient in times of the unknown are vital to a healthy corporate culture. These are the necessary essentials to create a winning team. Everyone needs leadership, management and development (including myself). Even as the CEO, I pay experts to help me stay accountable for the goals we set. I need someone to show me ways to improve production, provide coaching and guidance while seeing me through new levels

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of growth and helping me avoid traps and blind-spots I might not see from my own limited perspective.

This also makes the hiring, managing, and termination process much more vigilant and comfortable to incorporate. Some people will be the wrong fit. Gino Wickman states each person must *“get it, want it, and have the capacity”* for the position hired. If you continue to retain a negative attitude in a poor performer, someone who is truly not bought in or resistant to change and growth, will hurt not only your business performance but other team members will question the leadership and accountability in your organization. You risk losing good people due to poor management and leadership. At times, this does not equal retention; instead, it equals ‘right person, right seat’ - are they right for the overall culture.

If there is one thing I have learned, it is that you must hire slow, terminate fast, and cut out any proverbial cancer immediately. I have had to learn this the hard way far too many times. The one challenge I still face today is that some people have great value for the organization but do not fit well in the team environment or, at times, have inflated egos which does not fit our core value of being virtuous. If that person is a key leader, we are faced with asking ourselves whether we invest in developing this person because they have obvious skills, or find a better team fit, or carefully navigate the team to learn to better accept those with unique skills even though they may be rougher around the edges. At this point, I think it may be hard with 90 plus people to all work in perfect harmony, so I continue to focus on development of everyone. It presents a challenge when wearing multiple hats to ensure the growth of many team members. Back to my point - you are only as strong as your ability to develop leaders who can develop other leaders.

You are building a business. As such, there must be clear expectations set forth from day one that your business and your team will be a place of clear process, communication, positivity, forward-thinking, being virtuous and resilient to change. By explaining from the

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onset that their variations from the values, systems and vision will not be tolerated, you minimize potential misunderstanding. Employees can come to us if they believe there is a better way of operating and we will be all ears in inviting healthy discussion, disagreement and positive changes to our operations.

In a medical environment, a team's ability to adapt and work together through changes is a major factor in sustainability. After a decision has been made for the greater good, we all need to be on the same page and present buy-in, even if there is, ultimately, question that needs to be resolved. When a leader shows uncertainty or expresses doubt, the trust in the leadership team will be questioned by all. Create the buy-in, let the team know we will probably get it wrong from time to time, and course-correct as needed if a plan has fallen short of its objective. Course-correction is a normal part of doing business. Planes course-correct constantly to get to their final destinations; as should your business as it adapts to changing conditions.

Trust your intuition and make decisions that correlate with your goals, visions and core values you have put in place. Setting core values is not something to hang on the wall and admire from a distance. Truly embracing, living and harnessing the power of your core values is part of presenting yourself and holding others accountable to them as a way of doing business. This is fundamental in creating your culture, which will reflect in staff and customer retention efforts. When there are systems in place, combined with a positive atmosphere, everyone will be energized and ready to work. This is achieved when staff and the community have bought into your mission. Your happiness and fulfillment will attract greatness. Everybody wants to be a part of something as extraordinary - your practice can be extraordinary.

Seek qualified employees who have the "it" factor. They are out there; you just must know how to find them. It is important when you find great employees that you have systems in

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place to retain them just as you would patients. Motivate your employees financially and with recognition. Believe it or not, recognition holds greater value than money.

## **Grow Smart**

When creating your medical fitness facility, you need a solid plan of attack. One of the most important reads that helped our practice succeed was *The E-Myth* by Michael Gerber. The emphasis of the book centers on creating solid organizational systems that allow you to grow the smartest way possible. All the positions in your company must have clearly defined roles, objectives and metrics for tracking success. Once you have grown to a size that requires the next position needed, you will have clearly defined objectives for that position. Gerber defines three clear roles: the technician, the manager, and the entrepreneur. When starting, you may have to take on all the responsibilities of each position, but each has very clear roles and needs. Oftentimes, small businesses fail because of the lack of movement or fluidity in moving from one role to another.

Each subsequent move will allow you to spend more time on growing the practice. You may have to do many of the duties of the technician before you can effectively delegate to the next key addition to your organization. Some people can't move to the next stage because they can't let go and feel they must control everything. Therefore, you must create easy-to-follow systems that are replicable and accountable with checks and balances. If you aspire to higher income levels and helping more people, you will not be able to run your practice as a team of one.

My role upon being hired was to build our medical fitness program. We call the initial Medical Fitness Coordinator who is responsible for growing the program an "Implementer." I was able to join forces with Dr. Baumgartner, who needed to see patients daily, to successfully formulate the Medical Fitness I.M.P.A.C.T. Plan. Dr. Baumgartner knew he couldn't do this on his own - he simply lacked the time to build his practice on his own. It was simple math for him to understand he had to delegate all that tasks that didn't have a

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\$500 per hour value, which is what he could generate for the practice. This is one of the most important rules you must learn to live by - knowing the value of your time.

Living by this rule with each subsequent hire, we learned to manage, motivate, delegate, educate and let go of employees. With Dr. Baumgartner understanding this principle, he could be minimally involved in the day-to-day operations with confidence that his practice was growing. He has enjoyed watching his team create a system that allowed for the growth of his practice and, at the same time, improve thousands of lives. We constructed the medical fitness center of his vision without him working inside it.

When you follow the steps in this book, you and your key start-up fitness “Implementer” will take massive action to build the practice of your dreams. From what we learned, created, trialed and optimized in all the proven “done for you” systems, you have what you need to do it. The great part is that you get to skip all those painful learning lessons that we endured so you can take off running on the right foot. Our trial and error is your win!

### **Who Will Run Your Medical Fitness Facility as You Grow?**

You will have several team members: Fitness Coordinator/Director, Trainers, Assistant Managers, Administrative Assistant, Front Desk, and Customer Service Manager.

The role of the Fitness Coordinator/Director, or “Implementer”, is one of the most crucial positions in the entire organization. The “Implementer” is directly responsible for the success and growth of your company's program in the starting phase. They must have the ability to acquire sales in a respectful manner. They must be passionate about helping others, be able to speak with people, follow systems, and can successfully lead patients and employees by example.

The role of the Implementer will change as the business grows; initially, this person will wear many hats. When the patient base starts to grow, the Implementer will then hire MFS (Medical Fitness Specialists) to work with the incoming patients.

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Your trainers will be your technicians. Their primary focus is to work with the patients and help them see results. Your Implementer will start seeing fewer patients as he/she begins filling the trainers' schedules to work with new patients. The important part is that they understand and advance your philosophies and visions from the start. They need to follow all the systems, such as your nutrition and workout programs, client retention systems, policies and procedures, and integrate new fitness patients into the clinic for optimal results. Once there are two to three trainers, it will be time to bring on an assistant manager or back office administrator. This employee will take over many of the administrative duties the Implementer had to do. This will include billing, payroll, customer service, content delivery, and some training as well.

As growth continues, there will be a need for additional hires who specialize in roles that will help take your program to the next level. It can be difficult to know upfront the exact hire needs because each hire has different unique skills. The goal is to find people who are better than you in different areas of need and then to keep each team member working in their area of brilliance so they continue to be motivated. Each one of these positions has a detailed list of duties that are required to be accomplished daily. The Implementer simply inspects each employee's checklists to ensure the job is being done the right way and then to follow up periodically as needed to ensure systems and protocols are followed. This process also creates system enhancements for continuous improvement.

There is a system for when the next key employee is needed. The Implementer's role will be to implement all the systems. As growth allows, the position evolves to where the sole focus is managing systems, motivating employees, developing content, delegating tasks, and selling. The goal is to delegate all essential duties required to run the facility so you, the business owner, can focus on growth outside the facility.

In two years and six months, I was done working daily in the fitness center and moved to the Chief Financial Officer (CFO)/Vice President position to oversee the entire clinic/fitness

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operation. I was responsible for overseeing both the clinic and the fitness facility operations. My role as CFO/VP consisted of overseeing the entire workforce for Dr. Baumgartner, developing documented systems, inspecting all when in operation and making hundreds of changes along the way to get a much more effective, scalable, and profitable organization. It started by finding out what our processes were, what everyone was doing, what our numbers looked like - basic stuff. The team helped me create and pull together financial tracking systems that finally let us learn all the metrics behind our business. Phase I was to make our practice completely systemized and automated. There have been several adaptations and improvements from the initial system out of necessity as we grew. Whether it was a new electronic health record (twice), integrated technology, different roles, new additions to the staff - you name it, we crossed each one.

Trust me, trying to get everyone on the same page - especially from some guy who had no clinical experience - was no easy task. We lost good talent while we gained even more amazing team members, all of whom have helped get us to where we are today. In our time, we have had different personalities, views, individual visions, wrong people in right seats. We have also had the right people in the wrong seats. You name it - we have learned and lived through some tough failures and big mistakes. We lost insurance contracts for performing outside-the-box treatments. We lost focus at times by doing too many projects at once. There have been hard times and amazing times. In the end, we will not stop short of aiding in the greater mission of restoring health worldwide. Building something of this nature has been the more significant and rewarding challenge Dr. Baumgartner and I have ever had, and we are far from complete with it.

Two peers I worked with told me I was going to have my hands full and that I was taking on an impossible position. That was not news to me. I also knew (from my personal history) that I was born with a never-quit mentality and have the ability to withstand the greatest

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trials. I knew from the beginning that we were going to change healthcare with this model, that we would persevere and that we would make a real difference.

### **We Had to Share Our Model**

Our next greatest need came when we were ready to start selling the successful model we've built to help other physicians and business owners achieve success. We were profitable and into our new building, but the personnel and Human Resources (HR) systems and technology were not on par as we grew past 45 staff members. HR filing systems were likely out of compliance and not efficiently systemized and our technology was all outsourced. We were not advanced in these areas until I added an HR Director, Integration Manager and IT Director.

With those hires, our entire system went from amateur status to going full-on pro status. These three vital positions have built the key elements we have now to be able to operate effectively and profitably with our scalable system. Our Executive Team is surround by passionate leaders and team members; therefore, the sky's the limit with our mission and intensity to achieve it.

This may sound robotic, but our people love their careers with Rejuv. Five years ago, I took the position of CEO for both companies as our team doubled in size. I have had to come out of most of the day-to-day operations to ensure the growth of both organizations. I have the main responsibility of ensuring success for our entire organization and helping our executives be successful in their roles. I am grateful for each person as none of this is possible without their daily buy-in and living embodiment our core values.

Your systems, policies, procedures and employees should be empowered to grow with your vision.

### **Where You Will Find Your "Implementer"**

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Finding qualified employees is not difficult, but the “Implementer” position needs the most attention and will need to be the right fit for you. My experience was a great fit that led to the my success in my initial position. I worked at a gym while in graduate school, so I also knew the best trainers they had when I started building Dr. Baumgartner’s medical fitness practice. In my first year at the gym, I was a sales representative and, my first year after finishing my Bachelor’s Degree, I was a financial representative. Constructing water towers and playing in sports taught me that teamwork and hard work are the keys to lifelong success. Having two years’ experience in pure sales was a critical stepping stone in selling our vision and transformational outcomes to potential patients. While working in sales, I found a love for nutrition and working out, and discovered I wanted to be a personal trainer. I studied everything I could to become the most effective trainer I could be for my future career. My passion for nutrition was, and is, a must for leading clients to transform their bodies.

I was also a patient of Dr. Baumgartner’s so, essentially, he had multiple interviews with me before I was ever offered the position. He knew I was the right candidate to build his medical fitness platform. Dr. Baumgartner later told me that, in speaking with him, he understood my passion for helping others and knew my work ethic and drive. For your Implementer hire, you must take your time and make the right decision. From that point on, every employee you hire needs to share the same vision, values and know exactly what you're looking for, and be ready to do what it takes to make your vision a reality.

The first thing you want to do today is put an ad on Facebook, LinkedIn, Craigslist, or any agencies around the area describing the qualifications and position requirements. Communicating a thoughtful job description will be imperative to capture the right candidate(s) and facilitate a streamlined recruitment process. We also found that local colleges are a great location to find high- quality and eager-to-learn MFS. You’re not looking for someone who is great, and but thinks they know it all because they won’t follow your

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system. That just sets you up for a mess; instead, look for personal commitment to helping others with the ability to sell transformation with a willingness to follow and promote your system.

As our facility continued to grow, we discovered that long-term patients who love everything about your program can also make great employees. We're not looking for the everyday MFS. They need to live the part, be high-energy, great motivators, with compassionate, caring attitudes, and want to change other people's lives while truly exemplifying our core values.

Due to my affiliations with the Medical Fitness Network, Medical Fitness Association, Functional Aging Institute, and our recruiting platform, we post for all our partner facilities. I also conduct the interviews to see that candidates have the right skills which will increase the odds of having the right fit. I also check local gyms for sales managers, or highly-regarded personal trainers seeking a different career path.

One of the most important qualifications, other than living a healthy lifestyle, is that they are comfortable with sales. You may find an extremely knowledgeable exercise physiologist, dietician, or trainer, but if they lack any sales experience, they will struggle to grow your business. They may make a good team member or a good manager of your systems, but they need to have the ability to lead prospects to action. Too many medical professionals will try to sell with information instead of emotional hot buttons and the vision of transformation. You can teach sales, so if you have the right person with the "it" factor, they may still be the right long-term successful fit. I will be able to train them, but I need to see the numbers in our spreadsheet and have their full cooperation to teach them to close more than 80 percent of the prospects that come to your facility.

You want to find as many qualified candidates as possible to hold group or phone interviews. From there, you will give the vision of your company and what you plan to achieve. Explain all the systems and expectations of the position you plan for them to

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follow. In this position, you do not want someone who wants to create a program the way they see it, but the way that your design is to be followed. Some people don't interview well, so only the final 10 or so will get one-on-one interviews; I recommend doing these interviews in a panel with your other team members. From there, narrow it down to 3-4 candidates for one-on-one interviews with you. Then narrow it down to two candidates, go out to dinner with each and give them situations to challenge them for original vs. canned answers.

Once the Implementer is in place and you know that hire will be a great fit, it's time to expand your staff and let the Implementer continue to make most of the decisions from that point forward. The Implementer will report their weekly scorecard to you, but you will now be hands-off in terms of seeing masses of patients personally. Now it will be the Implementers' role to put the pieces of the puzzle together. I recommend that, once a new person is hired, you sit down with them to share your vision and the importance of each member's role. When people know why you do what you do, they will go to battle for you.

With new hires, there should be a 90-day introductory period with monthly meetings to ensure s/he is a great fit and meeting expectations to develop and fill in the gaps. You will know within three months whether your new hire will be a long-term employee of your organization.

As your business grows, I believe it's important to have one or two MFS with higher levels of experience, such as a Master's Degree in exercise physiology, to work with patients who are high-risk and/or with injuries. Those who do not have a ton of experience can be taught if they have the skill-sets and values you seek. Each of our MFS need to be certified with one of the better-recognized certifications to start with us. From there, we give them time to get certified in our own medical process.

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## How Much To Pay Your Medical Fitness Staff

When hiring your Implementer and any other employees, you don't need to go out and spend thousands of dollars to hire a team to create something from scratch. Hand-select those who match your core values, are excited for your amazing vision and motivated to be incentivized to help you grow something special. We have found it good to pay a fair market base and incentivize team members for growth and success.

Recognizing your employees holds far greater value than a high salary when starting, as wages are both the biggest expense to a startup and do not go as far as titles and incentives. When incentives are attached for positions, employees tend to be motivated in helping your company grow in the right direction.

Have consistent team meetings to communicate, as effective communication is proven to increase team morale and set goals to accomplish tasks that accelerate the practice forward. In addition to paying for continuing education, have other experts come to meetings and speak to your staff as education to be their best. It's the same thing you would be telling them, but hearing it from another perspective can make a greater influential impact. Take your employees to lunch and have staff gatherings. Be the inspiration and admirable company everyone wants to join and grow with over time.

With the Implementer, you want to provide a base salary with incentives to grow. Percentage of the monthly net profit, or EFT (Electronic Funds Transfer), and a profit-sharing model is the best method to motivate the Implementer to succeed. We also provide a base salary to the assistant manager as well as commission from monthly sales. Your administrator will be paid straight hourly rates with multiple incentives for various services performed. Your MFS will be paid a percentage of each session trained, an hourly for specific job requirements such as team meetings, and incentives for various services and performance levels achieved.

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On the clinical side of the practice, we work a production model of incentives as well as reward employees for outstanding service and for reaching a certain level of production. It is proven that practices and fitness facilities that operate with production-based models almost always outperform flat-salaried practices. We offer a percentage of net collections, minus expenses that has bonus allotments as certain metrics are met for our providers.

## **Trainer Scale and Client Distribution**

Following are examples of a typical pay structure for non-salaried Medical Fitness Specialists:

### **White Level MFS**

90-day Introductory Period.

MFS receives a 33% per session pay scale or \$15 hourly rate depending on payment structure. Hourly is recommended but each market must consider normal pay structures for MFS in your area.

\$10/hour for mandatory meetings, networking events, continuing education, sales opportunities or required time.

MFS will receive clients after all advanced-level MFS are given first opportunity; any self-generated referral or lead goes directly to MFS responsible for bringing in patient.

### **Can advance when:**

MFS passes 90-day Introductory Period and has formal evaluation of continued employment.

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Has brought in 2 referrals.

Follows all system checklists.

Successfully passes medical fitness certification.

### **Yellow Level MFS**

MFS receives a 35% per session pay scale or \$18 an hour.

\$11/hour for mandatory meetings, networking events, continuing education, sales opportunities or required time.

Will receive patients after Red Level MFS are given first consideration.

#### **Can advance when:**

Completed checklist documented in all files, following all systems.

Has a client retention percentage above 65%.

Has brought in 5 referrals.

Has 2 patient testimonials.

Maintaining 25+ hours of scheduled patients.

### **Red Level MFS**

MFS receives a 37.5% per session pay scale or \$20 hr.

\$12/hour for all mandatory meetings and networking events, continuing education, sales opportunities or required time, and receives first opportunity on all new patients.

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5% commission on any referral sales.

**Can advance when:**

Completed checklist documented in all files.

Following all systems.

Has a client retention percentage above 68%.

Has brought in 10 referrals.

Has 5 patient testimonials.

30+ hours of scheduled patients or classes to obtain full-time status with benefits at Blue Level. Must maintain full-time status for continued benefits.

**Blue Level MFS**

MFS receives a 40% per session pay scale and benefits if desired and maintains full-time status or \$24/hour.

\$13.50/hour for all mandatory meetings and networking events, continuing education, sales opportunities or required time, and receives first opportunity on all new patients after Black Level has no availability.

5% commission on any referral sales.

**Can advance when:**

Has a client retention percentage above 72%.

Has brought in 20 referrals.

Has 10 patient testimonials.

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Maintains 32+ hours of scheduled patients or classes.

### **Black Level MFS**

MFS receives a 42% per session pay scale and benefits or \$28 hr.

\$15/hour for all mandatory meetings and networking events, continuing education, sales opportunities or required time, and receives first opportunity on all new clients.

5% commission on any referral sales and 5% of maintained EFT for their patients.

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## Chapter 5: Automation and Core Processes Create Scalability and Freedom

**“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.” ~ Bill Gates**

An essential element you must fully comprehend is that, for your organization to scale and grow, you must break down each core process, so your entire organization understands how to operate. Automation and systems are the only way to be efficient, avoid waste, have consistency with employee and patient relations, ensure right outcomes with patients, reduce costs and grow without major pain.

We grew very fast and lacked any formal systems or core processes. We nearly lost everything and had to stop growing for a period to build our foundation from scratch. We had to develop core process for our major business functions. We did not create a 200-page manual; instead, we captured the important steps of each major function in a 30-page document as an overview of our entire operating system. We applied the Pareto Principle - 20% of the most important details will provide 80% of the information our team and patients need to know about our process. Each department head, such as our accountant, may have many more steps and details for our Financial Core Process they navigate operationally; however, personnel who don't need that will not have access to such processes. For example, our MFS staff does not need to know the Financial Core Process; they just need to know about payment policies, reimbursement, payroll, benefits, etc.

Once you establish core processes, you can begin to create systems that automate the steps of your workflows. Below I have outlined a brief description of each process. The purpose of this book is to help you keep your manual as short and sweet as possible; this is a review

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to the necessary components for a successful medical fitness practice. From the following, take what makes sense for your practice to implement with your unique products and services.

### **Marketing Core Process:**

The process of obtaining leads in today's market is through consistent content and relationship management. How you maximize the different platforms is how well you manage your time and use technical applications. It is essential to leverage your relevant, valuable content in as many mediums possible in a timely manner to create omnipresence in your market.

The more leads you get, especially as you get better at marketing, the more you will find they won't be ready to join your programs right away. Typically, potential patients need cultivation over time.

Here are a few keys to nurturing your leads into action:

- Construct a prospect workflow to follow-up via text, phone, email and social media.
- Generate an email autoresponder to share valuable content with your leads.
- Provide opportunities approximately once a month to join your front-end offer or other special promotional programs that will be shared on landing pages.
- Establish opportunities, like workshops and seminars, to get them in your facility and in front of your staff.

There are certain media applications, such as TweetDeck, that allow you to blast one post to all your social sites. These types of apps make it easy to create high visibility in your market.

Monitoring your results is a crucial element of the process. This is critical for split-testing ads, dropping what does not convert and maximizing what works. Having a team that

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understands the flow of lead acquisition, follow-up and results-tracking is essential for your organization to go from good to great.

### **Sales Process:**

A consistent and scalable sales process is the most important of all business functions for scalable, growth-oriented profitability. It's almost a toss-up between that and getting results with patients; however, unless you get patients started, they won't get results. Sales matters.

Without being great at sales, I find it very difficult for a cash-based practice or business to succeed in the competitive health, fitness and cash medicine industry. While I could write a book on helping people buy your services, along with the other thousands of books and styles on how to be a successful sales professional, I do not sell. I coach.

To effectively neutralize the selling fears that employees may face, we teach our team the skills and mindset needed to be successful. We prefer the term "assistant buyer" or "trusted advisor" vs. "salesperson". We also use push-away sales as opposed to hard selling. As a medical facility, we do not want the reputation of pushing people into products and services they don't want or are not ready to commit to for their benefit. Our dedicated sales staff are called Patient Advocates or Regenerative Communication Specialists - not sales professionals. It's the subtle assignment of aiding our prospects to achieve their desired outcomes vs. pushing products and services.

People are turned off by gyms, facilities and professionals who push people into uncomfortable decisions they may regret. There is a fine art to recommending and selling services. Our licensees go through our intense sales training program to help more people make the best decisions for themselves by asking important and reflective questions. They are not really selling at all. These are the skills we teach which have allowed our Fitness

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Director and Patient Advocates to sell more than \$1.2 million in our facility annually for the last two years.

This chapter is not based on theories. We have been trained by the most successful industry leaders, combined all the best practices and then applied them to medical fitness. The goal of this book and, more specifically, the sales process, is to assist you in attracting, selling, and retaining high-paying and compliant patients because you provide the best service value and results. I want you to try and embrace the beauty of helping others instead of thinking of it as sales. From an operating standpoint, new sales are the most critical factor for the success of your medical fitness facility. Yes, of course you must bring an amazing experience and deliver results. But you must get them in the door and started to make that happen.

The whole sales process is dictated by the mindset your staff has regarding the situation. Employees, and people in general, see sales as making people do something they don't want or that they personally wouldn't need to invest in for themselves. For instance, a personal trainer may have a hard time selling a \$380 a month program when they could not afford that themselves or because they already live a healthy lifestyle and wouldn't need the professional help. When they project their thoughts to potential patients, it is hard for them to inspire people to begin the journey.

The irony is that it's the exact opposite. It's about helping people get what they want and then assisting them in the process. Every potential patient we speak to wants to lose weight, change their body, lifestyle or overall health. People see sales as taking advantage of people rather than giving them the tools to be successful. They see it as talking people into their product or service vs. listening to what the potential patient wants for their life. They hear the sales term "close"; for me, closing means opening people for that change, joy and happiness that they may have been lacking.

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Those who cannot sell see sales as forcing or manipulating someone to do something. I only see it as “*What can I give these people?*” I love the slogan *The Biggest Loser* uses: “*Pay It Forward.*” We can make a difference. We are not in “the business of selling”; instead, it is “the practice of changing and giving people what they want.”

Selling means helping the potential patient to value the benefits of your services the way you see them - as transformation. It’s the transference of feelings from you to another for their vision to come true. Your responsibility is in helping the potential patient believe the benefits of living the same healthy and joyous lifestyle you enjoy. Your patients will live longer, healthier, and with more joy when they believe the value of what your organization provides and share the hope your services can deliver as a solution to their desired transformation.

The one thing we ask our employees to remember is that this person is going to have a healthier life in some fashion because of the experience we provide them. If you have that focus, and you truly believe that your service will benefit someone, it’s your obligation to motivate and challenge that person to change and make the investment in themselves. The best sales staff and employees are not those who are great closers or slimy sales professionals. They are great because of the goodwill and passion they get out of helping others. It drives them to make people healthier and to live better lives. Your job as the assistant buyer or trusted advisor is to help that person trust you to guide them to the solutions and results they seek.

You must explain to your sales staff, MFS, and providers that they are not a salesperson; they are a life-changer. They are not an order-taker; they are a prescriber. My weight loss sales staff will not let a person who has a good amount of weight to lose say, “*I just want to buy four sessions.*” We prescribe a program that is going to set someone up to succeed. We don’t allow patients to dictate the way we provide treatment; in that case, we are not the professionals.

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The same thing goes for weight loss. The potential patient would not be sitting in front of you if they didn't need the education, accountability, support, inspiration or motivation to get long-lasting results.

If your staff doesn't live by the "prescription" policy, you will not get people started in your programs, and you will not give them the results they need to be successful long-term. For this reason alone, you must follow a proven and predictable conversion system. If you don't, you will fail to help as many people as possible and your practice will struggle no matter how many marketing leads come in the door. Thus, all your marketing dollars will be for nothing. In one case, I had one group that was getting more than 30 leads a week but closing one prospect on average. In this case, the group needed to replace this person as there was, despite his care and passion to help others, no hope with these types of numbers.

It's easy to train your staff in the sales process. It's not difficult to learn how to build relationships, how to focus on prospects' needs and wants, how to communicate your unique program for transformation, how to understand each person's emotional hot buttons, how to handle objections before they even occur, and how to invite the prospect into transformation. Each employee should know the basics. It's your direct sales staff who are meeting with new prospects that needs to be well-rehearsed to assist people in beginning their journey. Time needs to be dedicated to finding the person who can build relationships by being caring, sympathetic, trustworthy, judgment-free, and a great coach. They need to bring hope, energy, and enthusiasm to every appointment. I call it the "it" factor - some have it, some don't.

Although the traits I mentioned are great, it's not critical if they are lacking a boisterous personality. All they must do is follow the systems provided and be able to listen to clients' needs and wants. Sales staff and employees who listen and hear the nuances and subtle clues that potential patients provide will be the most successful. Find the person who can

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open the prospect to their most relevant conversation, fears and desires and you will have new patients. Books like the *Go Giver* and *Low-Profile Seller* can help give your staff a fundamental understanding of how, through sales, they can help more people and, at the same time, feel positive about the difference they are making in people's lives when they get patients on the right program.

### **Financial Core Process:**

Following are key responsibilities and functions within the Financial Core Process that must be followed and documented.

- Accountant:
- Review bank account balances and credit card balances daily
  - Reconcile bank account balances and credit card balances monthly
  - Using various reports received from various departments, prepare cash basis financial statements for your review
  - Process payroll biweekly
  - Process quarterly and annual sales tax and provider tax returns
  - Prepare items for annual tax return and year end payroll
  - Member of MindBody (software program) task force reconcile all numbers and tie out correctly
  - Verify that intercompany accounts reconcile
- Front Office:
- Greet and check in guests – demographics – insurance intake
  - Collect balances on accounts and co-pays
  - PCC's count out tills at end of day
  - Prepare deposit slip

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- Take deposits to bank

Back Office: - All of the front office duties plus the following:

- Daily Close out reports
- Calculate trainers, esthetics and massage therapists' biweekly payroll
- Track trade agreements
- Member of MindBody task force
- Keeps petty cash

Billing:

- Process monthly billing
- Receive Payments
- Make deposit in Mind Body
- Collections/Payment Plans

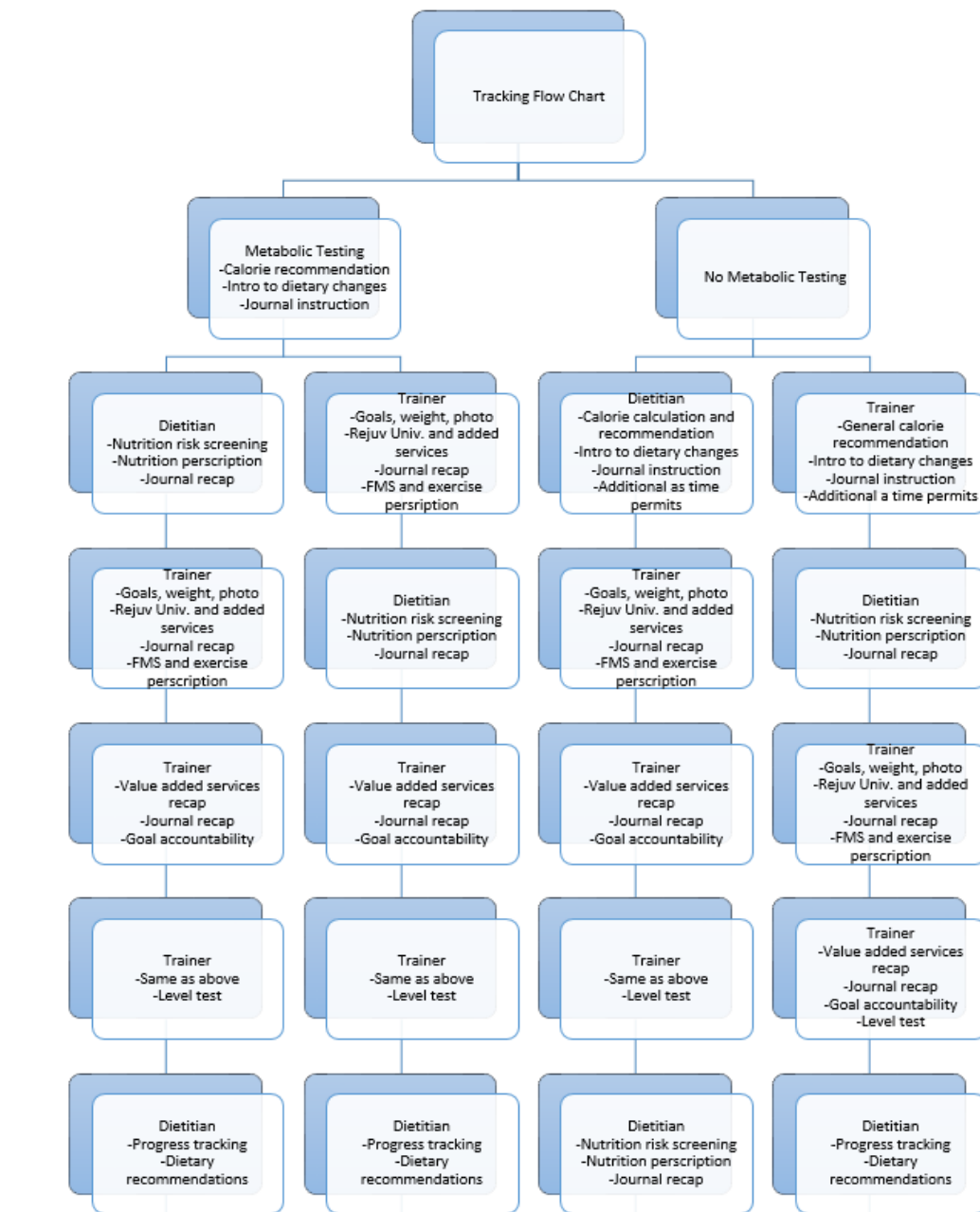
Accounting Assistant:

- Receive invoices that have been approved for payment
- Enter invoices into QuickBooks for payment
- Pay bills by cutting checks weekly
- Attach check to invoice being paid and bring checks to you for signature
- Mail out signed checks
- Reconcile petty cash
- Cut checks for approved reimbursements

**Gym Core Process:**

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There are a few routes patients can go, depending on whether they integrate medically by cash or insurance. The above graphic is if they choose any cash-based medical services or go directly into training. Our goal is to get them started as soon as possible and, depending

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on scheduling order and availability, the patient may see someone different for their first session.

Each new patient's information will be filed in the MFS's binder to make sure all core aspects of the fitness program are covered by the MFS. We have different client-tracking software and a plateau training module to track results and offer coaching and alternative solutions to any roadblocks patients may encounter in reaching their goals. The most important factor is that you have a process that is understood, effective and followed by all.

### **Clinic Patient Flow Core Process:**

Explaining how we diligently focused on automating our clinic patient flow to save thousands of hours a year is beneficial for you to know. We used to have a new patient packet that we had our new patients complete when they arrived. We quickly found many patients showed up less than the 30 minutes before their appointment requested to complete the necessary paperwork, so our entire schedule fell behind. As a first step in addressing this issue, we began emailing patients the packet at the time of scheduling their first session, and communicated they need to be on-site 30 minutes prior to their appointment if the forms were not filled out, and 15 minutes if already complete. That helped but we still had, several times a day, patients who had incomplete packets.

Our next phase of correcting this issue was to, during the reminder calls, explain the same process with a little more clarity. A new electronic health record system allowed us to do follow-up reminders with text, email and phone calls.

The last step was that the new patient packet must be entered online prior to their appointment unless they did not have access to a computer. This ensured that the record was populated in advance, saving your assistant the first 15 minutes of every new patient. This is just one simple example of how important it is to look at each system and see if there are ways to improve efficiencies.

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We utilize a process called Lean and Traction to continue to revisit each initiative for new ideas and technological enhancements that can save time and money. Each improvement allows us to benefit more patients and keep the cost of care stable as we grow.

### **Human Resources Core Process:**

Below is a brief outline of a top-level example of posting for a new position through the entire employment life cycle. This is for our staff to see; however, the HR Director has several additional components and documents that work into this flow that have proven effective.

#### **Intake Need**

- Assess overall needs
- Define role/create job description
- Wage assessment

#### **Recruitment**

- Post position website/social media/schools/networking sites/Career Plug

#### **Interview**

- Pre-Screen/Phone Call
  - Or Decline
- Interview
  - 1<sup>st</sup> round formal in-person
  - 2<sup>nd</sup> round formal in-person/shadow opportunity
  - Or Decline

#### **Background Check/Kolbe Test**

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## **Hiring/Extend Offers**

Letter/Benefits/Dress code/Job Description

## **Orientation**

First Day Orientation

Notification to appropriate team members/all company communication

Specific job training orientation/shadowing

30/60/90 Introductory Visits – Goal setting

Annual/Anniversary Date – Ongoing merit and goal setting opportunities

Compliance Module

## **Performance Improvement Plan – PIP**

As needed

## **Ongoing Benefits Management**

Health

401(k)

FMLA

Work Comp

EAP

Supplemental

LOA

## **Warning Systems**

Verbal/Written

As needed

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## **Termination**

Letter/Benefits Handout

Exit interview

Notification to appropriate team members/all company communication

Compliance Checklist Completed

The creation of core processes is simple. If something is not documented, there will come a time where it needs to be if you ever expect it to be understood and practiced by all.

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## Chapter 6: Communication Creates Clinical Success

**“Communication is the solvent of all problems and is the foundation for personal development.” ~ Peter Shepherd**

The success of your practice is predicated on your ability to communicate with your target market and amongst your team. Patients must have a desire for something your practice offers, and you must communicate how to fill that void. In turn, their life will be better because of your relationship. At the same time, you must deliver your service in a caring way that shows you are doing everything you know to do to protect them. As you grow your team, miscommunications have a proportionately greater potential of occurring and things can be easily misconstrued if you do not harness the need for clear communication as a major focus of your organization.

Communicating effectively is - and will always be - a commitment as an essential component of our success. We had many communication gaps in the past that needed to be addressed time and time again. Team building, core processes, operational systems, employment process all need to be consistently adhered to throughout the organization. For that to be a reality, the team must understand why each function of our system is necessary. We knew this would be the only way we were going to adapt and grow while advancing all our communication channels.

As an overview, it's very difficult to dive into our communication systems and use of technology as it is broad and intensely vital to capture the nuances. It's more important to know 'how' we communicate. We have used Traction EOS, a management/leadership entrepreneurial operating system that involves the entire organization, to improve communications throughout our organization. Communications include everything from

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the mission, vision, core values, core processes, business plan, meetings structure, communication platforms, metrics reporting separated by department - weekly, monthly, yearly and beyond goals - for your organization. As of the writing of this book, we are only four years into the process and have made serious strides at fostering interdepartmental communication and cooperation with the use of this system. The Executive Team commits to weekly, quarterly, and annual planning meetings. Every other department meets weekly as needed and directors communicate to the Executive Team so we all work together to execute the quarterly and yearly goals.

Below is a diagram of our basic Traction vision.

CORE VALUES	<ol style="list-style-type: none"> <li><b>Virtuous</b> – We check our egos at the door, we are humble and loyal to each other as we listen and create a unified synergy with patients and our team.</li> <li><b>Brilliant</b> – We are unique pioneers. We are growth-minded and strive for excellence.</li> <li><b>Results</b> – We are here to change healthcare by restoring health and vitality in our patients. Our outcome-based approach will hold us accountable. Quality care with quality outcomes.</li> </ol>	3-YEAR PICTURE™
CORE FOCUS™	<p><b>Purpose:</b> Restoring health worldwide</p> <p><b>Our Niche:</b> Through integrating regenerative orthopedics, functional medicine, and medical fitness.</p>	<p><b>Future Date:</b> 12/31/2018</p> <p><b>Revenue:</b> \$11,000,000 Waite Park (\$3,000,000 MedFit)</p> <p><b>Profit:</b> (30% Net Profit)</p> <p><b>Measurables:</b></p> <p><b>What does it look like?</b></p> <ul style="list-style-type: none"> <li>• 100-120 Employees</li> <li>• 7 FT Physicians, 4 FT Nurse Practitioners, 2 Physician Assis</li> <li>• Extended Hours</li> <li>• 1,700 Gym Members &amp; 350 CrossFit Members</li> <li>• <del>HARDcore</del> producing \$400,000 revenue</li> <li>• 1,500,000 in Corporate Wellness Accounts</li> <li>• Build out of the building to include business offices and gym</li> <li>• Formulate Corporate Partnerships – MRI's, Surgeons, etc.</li> <li>• Develop efficiencies to better utilize technology</li> <li>• Patented App-Based System fully operational</li> <li>• CFO Role</li> <li>• Online-training module</li> <li>• Have all insurance contracts (any willing provider act)</li> </ul>
5-YEAR TARGET™	<p>350 Locations (Communities Impacted) Worldwide through the sales of Licenses, Masterminds, and Franchises. As of 8/14/2016 count of 31.</p>	
MARKETING STRATEGY	<p><b>Target Market™ "The List":</b> 30-50 yr old motivated and informed health conscious patient who suffers from chronic degeneration or fitness related issues.</p> <p><b>Three Uniques:</b></p> <ol style="list-style-type: none"> <li>1. Regenerative Orthopedics</li> <li>2. Functional Medicine</li> <li>3. Medical Fitness</li> <li>4. Integrated outcome driven</li> </ol> <p><b>Proven Process:</b> C-FAN (Cell Health, Functional Movement, Articulation, Nerve Health)</p> <p><b>Guarantee:</b> A comprehensive approach to partner with patients to maximize their outcomes.</p>	

Can you articulate exactly how to achieve the desired outcome your patients seek? Your patient has no idea what that looks like or how to achieve that result, nor do they have the confidence. It's the understanding you and your staff have of the process and their transformational desire that makes your practice the best.

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Per Jay Abraham, author of *Getting Everything You Can Out of All You Got*, every staff member working with patients will need to share your same core mission by using the Strategy of Preeminence as follows.

- 1) **Empathy** - A true compassion to help your patients change their lives for the better.
- 2) **Leadership** - Taking authoritative charge of your patient's health by being a leader. It's your confidence, knowledge, and direction that will lead them to long-term change. You will be their trusted advisor for life. You will always be there. You are their hero.
- 3) **Understanding** - "*I know how you must feel.*" You must relate to your patient's fears, dreams, and goals. The more they feel you know them, the more they will align with your vision for their success and, ultimately, sing your praises. The more personal touch you can provide, the deeper your relationship.
- 4) **Focus** - Provide your patients with clarity and certainty. Clean-cut directions to attain their goal, and how you can help them one step at a time, creates success. The ability to give them the life they want through your focus and guidance cultivates long-term relationships. You are committed to them as their leader; your path together is different and unique, and you will guide them there through relationship!
- 5) **Connectivity** - You will connect the dots for your patients - you know better than anyone what they need.

Jay States, "*Being preeminent is the foundation of everything you are and do.*" We use phrases like the following all the time. "*I will not let you continue to let your body down.*" "*This is what you need.*" "*I will not let you not achieve your goal.*"

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With medical knowledge, you understand what an unhealthy lifestyle does to a person. You have a responsibility to help them change. You have a responsibility to make your patient's life better mentally, physically, and spiritually.

With the right guidance, we professionals have the opportunity change lives in a big way. Providing extreme value to your patients is the biggest and most powerful factor for guaranteeing a long business life for your practice. Patients must feel welcomed, respected, loved and protected.

One of our trainers continued to struggle in getting results for patients and retain them for more than 4 - 8 weeks. She continued to tell me, *"It's not my fault that they won't listen."* I said, *"You're right - it may not be your fault, but it is your responsibility to help lead them to their goal."* The entire team is vigilant to the development of patient-centered care and coaching skills, so we can help guide patients to greater success.

### **15 Tips for You and Your Staff to Live By:**

- 1) In speaking with patients, you must be politely transparent.
- 2) Don't let your patients feel out of control.
- 3) People need solutions that they agree to - not just intellectual strategies.
- 4) Don't bedazzle them with your greatness - reflect theirs.
- 5) Make sense, respect your patient's intelligence, change their lives.
- 6) Always show your patients where they started from and how they are progressing towards their goal.
- 7) Show your patients how far they have come and how important every small change is to their larger goal(s).
- 8) Give patients ways to validate their decisions and let them help choose the changes they are ready to make.

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- 9) Always be hopeful; optimism is contagious.
- 10) Show patients you understand and listen to their needs.
- 11) Coach your patients. People get lost in information; they seek a solution that works for them, shared in a way they can receive.
- 12) Without trust, your patients will not act; without understanding, they won't change who they have come to be and who they are in their most powerful essence.
- 13) Always use multiple ways to communicate; make systematic follow-up a priority.
- 14) Live from a positive place - greet people with excitement, personal recognition and enthusiasm.
- 15) Always be thinking: How many more lives will I improve and help today?

I have found the more a person develops their communications with patients and their ability to give patients what they want and need, the greater their success will be in all areas of their life. Effective communication is one of the best skills to develop and maintain. Personally, I have grown exponentially as I've become an experienced communicator; however, I still choose to develop this skill even more to expand our mission into our next level of success.

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## Chapter 7: Training and Corporate Wellness Programs

**“The most important thing is to try and inspire people so they can be great in whatever they want to do.” ~ Kobe Bryant**

When deciding which business model to incorporate, there are several considerations you must first navigate. First, have a plan of what business goals your medical fitness program will meet. Will your fitness program be a funnel for your medical practice, used to get your current patients greater outcomes, or are you looking to maximize revenue opportunities? Are you going to be working with only high-risk populations, the elderly, people who have suffered trauma or some other special demographic? Are you in a location that will have enough square footage to provide you the opportunity to run group sessions? All these questions need to be considered before diving into a medical fitness business venture.

Our program started out in a room the size of a common household closet. As such, there was no way we could have run group classes. One-on-one training was our only option. When I reached a full schedule, I hired two trainers and we used a local gym facility and paid monthly memberships for each client. When summer came around, we started running fitness boot camps outside. We also started working with local high school teams by going to their school and running workouts in their weight room and on the football field. Once we had enough clients, we knew we would need a much larger space, so we began our search for a standalone workout facility large enough to suit our needs. The one downfall of this facility was that it would have to be separate from our medical clinic.

Once we had enough space, we could operate any type of fitness program without limitation. When you have generous space, you will have the option of running different

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types of fitness programs. These different fitness programs include: one-on-one training, semi-private training, boot camps, medically supervised training, sports performance and corporate wellness programs. Each of the programs meet a need in the market and will be explained further later in this book. This book will discuss the model and principles of each type of fitness programs that are available, but will not get into the specific program content of each one. Our licensees will be given extensive training on the assessment, programming, and implementation of all topics related to these or any of our training programs.

### **Medically Supervised Training**

Any programs that are supervised or delivered by medical professionals as an extension of a medical provider are called medically supervised training programs. These programs are usually billed through insurance as licensed medical staff will administer and/or supervise the programs. Medically supervised training is the most common program with a patient who has diagnosis codes, which then allow you to bill through insurance.

There are a few current models for this type of programming. If the diagnosis codes allow you to bill insurance, you may have the option to have an exercise physiologist/physical therapy assistant administer the workouts that were designed by an M.D. or physical therapist. In this instance, it is much easier to bill through insurance with a diagnosis of physical injury as opposed to an obesity diagnosis. However, certain insurance companies are allocating a specific number of dollars to be disbursed to patients who have an obesity diagnosis.

Medically supervised programs will have a higher profit margin than cash-based personal training services due to insurance reimbursements. The barrier to entry is lowest for the patient as they are not paying cash out of pocket when insurance will cover medically

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supervised training. Even though the program is processed through insurance, each patient is still responsible for their insurance deductible. We have found that, in most cases, those who may be classified as high-risk or have one or more physical limitations usually reach their deductible one way or another, so this is not a barrier to entry for our programs.

A major consideration is that the United States Supreme Court upheld the Affordable Care Act. Our healthcare system is in desperate need of solutions due to the rising cost of healthcare and increasing incidents of metabolic-related disease due to obesity. The need for medically supervised fitness-based programs that teach proper nutrition and exercise has never been more desperately needed until now. I can almost guarantee that, in the next two to four years, there will be thousands of programs similar to what we have created. There are strong movements in the medical fitness arena that are advocating for insurance-based coverage for facilities such as ours. Clinics that are medically fitness-integrated will help fill the void between long-term prevention and treatment.

### **One-On-One Training**

This is the model that has catapulted our practice success in the shortest amount of time. Although it is not directly supervised by medical professionals, we highly rely on our medical clinic to better provide solutions for our patients. We can offer physicals, metabolic testing, food allergy and sensitivity testing, bio-identical hormone balancing, functional medicine labs and injury treatment and therapy. A large portion of the population is interested in losing weight or learning to live a healthier lifestyle. When potential patients come in for a consultation, they typically ask about losing weight or learning to exercise and eat better. The medical testing can help identify the best methods for doing so or get them past a plateau. The only difference is that we are using personal trainers to deliver the exercise and nutrition guidelines. Don't get me wrong - if they need to see our dietician

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or physical therapist, we recommend they do so. We just communicate back to our medical fitness specialists the limitations or recommendations of our medical findings.

People come to us because we are different than a gym. When you have the medical name, it is much more trusted than a standalone gym. When we have clear direction from medical staff, we are better able to serve those who have any complications or any health considerations. We have an extensive certification program for our MFS's that prepares them to help those with various medical-related conditions and injuries. It is a great synergistic effect that our patients receive when working with us toward a common goal.

We highly recommend that anyone starting a program begin with our one-on-one training programs. Once we are confident the patients have proper exercise form and understand what healthy nutrition is, we are happy to advance them to group training or boot camps.

As far as profits are concerned, a one-on-one training studio alone is not a large source for profits. At one point in our standalone, we had more than 180 clients and we were unsure about why we were not profiting as we had initially. The reason is, when you perform one-on-one training, the net profits are meager after paying the cost of your trainer and the expenses of running your practice. Now don't get me wrong - you will still see a huge revenue increase in your medical practice due to the one-on-one training that you refer to the clinic for lab testing, office visits, procedures etc. but, if you do the accounting as two separate entities like we have, the margins for one-on-one training are small compared to reimbursable programs, group training or boot camps. However, it's about the broader picture of being able to help more people and having a massive funnel to your medical clinic with even greater potential for higher reimbursements and enhanced patient outcomes.

## **Group Training**

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By far, one of the most effective ways of training today is group personal training. This means anywhere from 2- 8 people with similar goals, conditioning levels, and experience at the same time. As a medically integrated fitness studio, you can help more people at one time using this model. They all have the same access to your medical services and program offerings; the difference is that they are simply training in a group as opposed to one-on-one to be more cost-effective for the patient(s).

With small group training, you can earn hundreds of dollars per hour. When training three, six, or eight clients at one time, the practice will make far more money for your time than with the one-on-one model. Using the semi-private training model, your MFS staff members can work part-time hours while making as much as a full-time MFS. We want to make sure we retain high quality staff so full-time MFS can make a more fruitful living with our facility than working at a typical gym. We charge \$35 per person for an hour-long group session. When training one-on-one, an hour workout would be around \$80. In addition, it is more affordable for your patients and the profit margin is much higher for your facility. If you have five people, it becomes a \$175-hour session. If you can fill your busy hours with semi-private sessions, you will see your net profits rise dramatically. If you have only one-on-one sessions, you will have several starving MFS team members as they will all be full during the prime hours between 4 p.m. and 7 p.m. When your MFS team members get full, you will need to hire another MFS. It is very important that you begin to develop semi-private training once you are established.

With group training, your workouts are almost always fun, exciting, and fast-paced so patients love the workouts. When you have this system in place, you will also attract more referrals because you have access to more clients. Once you establish this type of environment and culture, if you lose a patient, it is easy to find another patient to add into the group. The greatest benefit is that you will help more patients in less time. With group

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personal training, because you combine the individual attention and progression of personal training with the high energy of boot camps, you're able to get more people into shape than with other forms of training. Small groups are much easier to manage than huge boot camps and the risk of injury is far less when you can monitor form.

With small group personal training, you will acquire the intense camaraderie, competitiveness, and high energy of a boot camp while still being able to keep everyone's form spot-on and make sure they progress in each exercise as would happen with private personal training. It combines the best of both worlds for the ideal training experience for you and your patients.

Another major consideration is the lifetime value per client with group personal training. You have a much higher average retention rate than with one-on-one training because the workouts are far more affordable and you're able to charge rates that your average client can afford for a long period of time. Group training also builds a support system the client will benefit from to stay active and healthy on their journey. You will immediately find the group is committed and accountable. When one person misses a session, we make everyone in the group do "get well" burpees or push-ups and ask everyone in the group text the missing person. You can't get that type of accountability with one-on-one training. Patients don't want to miss out on spending time with like-minded friends who are all seeking to enrich their lives.

## **Boot Camps**

Boot Camps are a growing industry and a great way to get a lot of people in shape and provide challenging workouts. Boot camp exercise classes vary in style, depending on the teacher. But you can generally expect to be challenged on all aspects of working out. It's an hour or half-hour doing some form of cardiovascular exercise, such as running, hiking,

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interval training, or obstacle course challenges, as well as strength elements using dumbbells, exercise bands, body weight resistance and every other piece of fitness equipment you can dream up. We also focus on flexibility in a stretch portion of the class, which may incorporate elements of yoga or Pilates.

With boot camps, people can come as often as they like without having to book a set time. Boot camp classes are offered for defined periods of time. We have 30 set classes per week. By offering different times, people can come without an appointment and whenever it works in their personal schedule. This is usually easiest for clients, but it does have its disadvantages.

It can be difficult to progress your clients in the same way you can with personal training. Another difficulty is that, sometimes, you will have people who want to come five days a week and that can be hard on the body if you neglect structure to avoid hitting the same muscle groups every day. The sessions are designed to give a great overall workout and are not specifically designed for one person.

You will have numbers ranging from 5-30 people and you must design your workouts to keep people moving. The drawback, when you have the high attendance numbers, is that it is difficult to keep a close eye on form. The risk of injury is higher in a boot camp setting as compared to a one-on-one workout. Therefore, we prefer all our patients to start with personal training or semi-private group training before moving on to boot camps. By doing this, we can teach proper form and lay down the nutrition foundation, so people can see results and minimize risk of injury.

The major benefits of a boot camp include being able to charge a set amount of money and maintain low overhead. On average we charge \$127 a month and can provide impressive workouts and a high-energy patient experience for an affordable price. This can be much more affordable for the patient as compared to one-on-one, or semi-private group training.

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Much like group training, the earnings are much higher than a one-on-one session. This can provide your facility with the highest net return.

In conclusion, we include each of these programs into our facility. It depends on the size of your facility on which of these models you offer. The more patients you have to draw from, the more options you will want to add. I know multiple people in the industry who only specialize in one or two of these options. It's all about finding out who you want to serve and the type of business structure you desire for your practice. For example, if you are only going to market to the high-risk or elderly populations, I would probably only focus on the medically supervised, personal, and semi-private training models. When appropriately rolled out and managed, they all can be very successful.

## **Online Training**

The wave of the future will come in forms of online training, health coaching, and telemedicine through digital coursework, group and individual webcasts. Our online platform has allowed us to reach many more communities worldwide, and we have just begun the journey. Both potential and current patients in our community as well as around the world are looking for more affordable and time-convenient care with no geographical boundaries. Not taking proactive steps aligned with the future of medicine is a major oversight, in my opinion.

Most training, coaching and functional medicine can be performed digitally with ease once workable technical systems are put in place. These types of programs offer greater margins for the practice, are more affordable and offer more detailed care for patients. Online platforms empower significant time savings for medical and fitness service providers. Inside our licensing and coaching program, we are setting up online systems for practices to improve current margins and stay a step ahead of the next shift in healthcare.

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## Corporate Wellness

Corporate opportunities lend a significant opportunity for medically supervised programs. Insurance costs continue to rise for employers. There are many options to help companies grow their wellness programs with rates that fit any company budget. Everything discussed in the online training section of this chapter can be effectively delivered to companies. Healthy and motivated employees are critical to the workplace. Unhealthy employees can negatively affect the bottom-line of corporations in terms of expenditures related to insurance and absenteeism.

Much of your workforce will spend more hours at work than anywhere else, in addition to the time they spend commuting each day. In fact, the typical American works approximately 47 hours a week, which is at least 164 more hours annually than was the average 20 years ago. Given these statistics, it is easy to see why maintaining a healthy work/life balance is becoming increasingly essential. Corporate wellness programs are an important benefit to establish this balance. Programs that emphasize corporate wellness can be implemented in a variety of styles.

One of the primary benefits of corporate wellness involves a reduction in the rates of illness and injuries among employees while globally reducing chronic disease and metabolic syndrome. Unhealthy employees experience a wide range of work-related injuries, such as muscle strain, carpal tunnel syndrome, stress fractures, and/or back pain. High-risk individuals are also susceptible to developing complications such as diabetes, heart disease, and/or a stroke. Employees without the opportunity to participate in corporate wellness programs may develop serious illnesses. Consequently, they could find

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themselves on long-term disability for an extended period or be forced to discontinue working entirely.

In addition to preventing illnesses amongst employees, corporate wellness programs also lead to a reduction in employee absenteeism. Employees who are stressed, unhealthy, or overworked tend to become sick more often than healthy employees. When programs focusing on the benefits of corporate wellness are implemented, this rate can be drastically reduced.

Another benefit of corporate wellness programming is a reduction in the cost of healthcare. When employees are healthy and less stressed, they tend to rely less on costly programs, such as disability insurance and sick leave. Over the last two years, while most companies have experienced significant increases, we have not had a single increase due to a healthy workforce. Our premiums have not increased; instead, they have remained the same. Companies will notice a significant decrease in healthcare costs once they incorporate wellness programs into their workplace.

Corporate wellness programs also contribute to enhanced retention of key employees. Companies that implement wellness programs typically experience a much lower rate of employee turnover. Recruiting, marketing, and advertising for vacant positions is very costly, not to mention the brain-drain factor on knowledge and that it is time-consuming to hire new staff. If your employees are happy and healthy and enjoy working at your company, odds are they are more likely to stay at your company. Employees with health and fitness benefits have reported they feel that their companies care about them personally, which fosters a strong sense of community and commitment from staff in the organization.

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Increased productivity is another benefit of corporate wellness. Employees who are fulfilled and healthy tend to produce a greater volume of work at a higher quality than unhealthy employees. Employers need to realize that implementing health and fitness programs will lower stress levels and increase the overall output of their employees. Many executives and owners look only at the added costs versus the long-term investment and savings such programs have been proven to show over time.

Over the last two years, several companies who are self-insured have implemented regenerative services to their plan to slash their orthopedic spend. According to medical stem-cell research company Regenexx, nearly 80% of a company's orthopedic spend can be reduced by providing non-surgical regenerative solutions. Reducing the use of medications and surgery can have a dramatic effect on a company's bottom-line.

Our goal is to lead companies in experiencing a reduction in employee injuries, illness, absenteeism and healthcare costs, and an increase in employee retention and productivity. Assuming responsibility for establishing a healthy and harmonious working environment allows everyone to relish the benefits of corporate wellness.

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## Chapter 8: The 12 “Should Ask” Questions Before Starting a Medical Fitness Practice

*1) For successful medical fitness practices, what is the most important factor for growth besides the right people who can sell and launch the program?*

In my opinion, the answer is the same for your fitness program and your clinic. You must build using proven strategies for results. Two key growth strategies are having the right staff and a solid marketing plan to get prospects into your funnel. However, those alone are not enough.

Even with terrible marketing, your business can grow slowly if you are superior to any other solution provider in your market. You get referrals when you get results - this is the number one way we acquire new patients. Being acknowledged for results helps you stand out compared to any competition in the area. Providing extreme value and results to your patients is a powerful factor for guaranteeing a long business life for your practice.

Welcome, love, respect and protect your patients to help them keep going toward their ultimate goals. There must be systems in place that empower your patients to get their desired results. After years of practice, it became easy for me to coach people and see results. Many of my subsequent hires did not have those same skills so I had to create training systems accordingly; our organization shifted to employee development training programs with the curriculum created to retain and maximize patient outcomes.

When we meet with patients, we build rapport and are honest with the gaps they need fill to attain results. We share this information in a very compassionate and caring manner. When someone is morbidly obese and says they just want to go once a week for only a

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month, I know I am failing that client by not saying they need a year-long program three times a week. Someone who is inactive and seeing a physical therapist will not get better once a week - we need to see them a minimum of two times a week.

Not offering upsells and telling patients the most effective, fastest, and proven methods of getting results is what we consider not caring enough for your patient. For example, if we sell a training package and stop the process right there, we have done the patient a disservice by not providing the most effective way to get results. After you advise them into investing in training, your next line should be, *"By the way, here are three supplements that will help you see the best results,"* or *"I know your knee hurts. Would you like to meet with the doctor first?"* You must advise them on what will be best - you cannot view this as sales. You don't need their money. The clinic, facility and program will go on without them. Instead, you truly desire your new patient to reach their goals. It's being an assistant buyer and a trusted advisor - not a salesman.

It's okay if a patient chooses not to follow exactly what you recommend, but the point is you must offer them the best path to their goal. Once you have done that, you will continue to show your value to patients. It's not just about results; it's about impacting lives.

We focus most our staff training on how to retain patients and get the best results possible. We educate the reasons why paying clients stop training. The goal is to retain 72% of our fitness patients for a minimum of six months. This is the only way we can have a long-term impact. Below are the three categories clients fall under when they leave.

- 1) No results - Patients will not pay what we charge without results unless you are filling another need.

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- 2) The value in the relationship has changed – the patient is no longer being challenged, the trainer and patient are more like friends now, they hit the goal together and a new one is not established, or a similar more affordable experience may be elsewhere.
- 3) Poor experience - Customer service, unfriendliness, no connectivity, dirty.

Each of these can be addressed in the relationship when the MFS has awareness and training on how to handle these three critical aspects.

***2) Considering “failed” programs, what are the most important staffing lessons you learned as a result?***

We failed to grow a profitable fitness facility in fifteen locations. I can narrow the reasons why those failures occurred down to specific five reasons.

- 1) The Implementer is the wrong hire, were not paid what they believed was fair or were unhappy with the long-term growth plan. In a few instances, I believe that to be true; the others did not take an ethical route, in my opinion, because they took the patients and started their own business.

I recommend a proper incentive-based performance structure, profit sharing model and, possibly, ownership options once performance is proven. Just in case the first person cannot handle the Implementer role, I believe it is very important getting in a second trainer as fast as possible so if the first leaves or can't handle the responsibility of growing the program, you are not starting from scratch. I have had a handful trainers at our facility leave to start their own business and only two did it the right way. This is the nature of the training business at times.

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Amongst all of them, only one is making more than they were as a trainer at our facility - he was the most skilled all around. He was my fitness director after I was promoted to CFO/Practice Administrator and he learned the skills necessary to write his own story. Non-competes in the fitness world rarely hold up in court. I have an abundance mindset and know we can replace the patients when we do our job; I'm happy if they are contributing to making the world a better place. That said, I recommend a non-disclosure agreement as these are more enforceable in protecting your proprietary information and your patients' information. Most patients build a relationship with their coach and you stand to lose patients even if the trainer leaves your organization the right way.

- 2) Team members do not grow and demonstrate full comprehension of your program in the first 90 days. If a team member is not successful in first three months at following your plan, no matter how much you/we like them, they are not the right fit to grow the program. Networking and sales are essential skills of the Implementer. Our program is a license program. I don't have the final say but I let each group know very quickly if they are showing the promise of being the right fit. They may be a good fit as a Medical Fitness Specialist, but the Implementer needs a comprehensive skill set and/or shows consistent growth in the required areas.
- 3) Hiring someone for the wrong reason. Hiring team members without the capacity or skill to run the program because they are a relative, friend, former patient, or because they are affordable is not a good idea unless they have proven success. For each of our affiliates, I interview all initial candidates to ensure they have the initial skills necessary to grow the program.

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When I interview, I determine they have proven experience or the capability to be developed in the following four skill areas which are crucial to your Implementer's skill set. For one group, I interviewed more than 20 candidates before I found someone with these necessary abilities. They must:

- a. Have proven sales and networking success.
  - b. Experience in training, retaining and providing results for patients.
  - c. Stay organized and process basic administrative functions until delegation is a possibility.
  - d. Manage, lead and develop future talent.
- 4) Micromanagement. Owners or Directors who micromanage too much, in areas that do not require micromanaging.
- 5) Communication issues. Lack of fluid, consistent communication or non-collaboration between clinic and gym staff. Several Implementers have stated a lack of teamwork in growing the program along with constant pressure with minimal support as reasons for leaving (or considering leaving).

### ***3) What is the biggest marketing mistake you have seen in your business?***

Not having a marketing budget of at least \$750-\$1,000 a month to consistently have print materials, social media and networking opportunities. Not maximizing the grassroots strategies to grow the outside referrals that are necessary with the launch of the program is a major oversight. In addition, not increasing budget when a positive return is found on any marketing platform. There are times when owners view an increased budget as an expense rather than an investment in both the immediate and long-term growth through positive return.

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***4) How much time does the physician or owner need to be involved in growing their practice?***

In the beginning, we recommend participation in creating the personal marketing storyboard materials and infographics that share and build on the practice's proven process. A vision email and why communication statement will be part of your long-term marketing strategy. In addition, content videos from providers hold significant value. Autoresponders will be written and programmed as a competitive advantage from other fitness facilities by highlighting medical oversight. When the Implementer sets up medical referral education meetings in the community, this is a significant opportunity for clinic and medical fitness growth when the physician is involved in these education opportunities. We also recommend physician involvement in passing out medical fitness test-drive cards to patients during appointments. Lastly, groups that have weekly 30-minute meetings regarding key performance indicators and that work with me on a monthly call have shown greater success.

***5) Am I able to bring my staff members to work with you?***

The greater buy-in and development of the entire organization, the more influential impact overall for your organization. We have detailed advanced training for each role in your organization- provider, billing, IT, administrative, nursing, marketing or business development staff. We want our partners to replicate our path to success while avoiding the mistakes we made along the way.

***6) Can you help me hire the right staff for my program?***

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We teach and have a turnkey recruiting system for each group partner to become equipped with job descriptions, compensation plan options, posting templates, prescreen and interview questions, sample offer letters, suggested benefit offerings, compliance modules and where to post recruiting ads.

We recently implemented a fast action scholarship for our programs which starts after a discovery and strategy call, where we do all the recruiting and interviewing to ensure we have the right candidate with the appropriate skills (a value of more than \$2,000). After this process, we still want each candidate to do an in-person interview to assess skills, harmonization, expectations, personality and core values match. During this key process, we are observing many factors, such as timeliness, presentation, communication style and professionalism, during the individual interview and team shadow opportunity before a candidate is formally offered a position.

***7) Will you be able to teach me everything your clinic is doing to be successful?***

Absolutely! That is the main goal - to increase patient outcomes, profitability and have massive community impact. We implore you to replicate what our team has successfully created. Now ten completed years in practice, our model can't be replicated overnight. We created "The 5 Pillars of Practice Success" that is designed to create a highly profitable, scalable, automated and impactful practice over the course of three years. This includes the Medical Fitness I.M.P.A.C.T. Plan as one of the 5 Pillars.

Below is the curriculum for our three-year program. Some groups will be able to complete the curriculum faster while others may require more time; however, the step-by-step proven process will succeed when consistently executed.

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You can learn more about the curriculum in my bestselling book, *Cash Practice Success: How to See Half the Patients, Increase Your Income, Eliminate Insurance and Practice Medicine that Restores and Regenerates Health*.

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**8) What will our group have to create in addition to what comes with the Medical Fitness IMPACT Program?**

Your original story, mission, core values and scorecard modeling the templates that we provide will be requirements to create to measure and ensure success. Creating custom videos and content will also speed the reach of your message and create a connection for your community to know, like and trust your practice. Each pillar comes with worksheets, video or audio training, and templates to input your unique information.

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To make the full program integrate with your model of healthcare and current systems, we will work closely with your group to customize a workflow that will support meeting practice goals, objectives and key performance indicators.

***9) How do you track success as the Medical Fitness IMPACT Program coach?***

One of the first coaching sessions we experience is to establish projections, key performance indicators, tracking mechanisms, and overall scorecards for each of your team members and departments. You can't manage or improve what you can't measure. You get what you inspect, not what you expect. Your success is measured based on what you decide is important and fits your practice; my role is to share everything I know and help hold you and your team members accountable to what you've said you want to achieve in your practice.

***10) When do you think all insurance(s) will cover medical fitness for reimbursement?***

Centers of Medicare and Medicaid Services (CMS) started to cover preventative and wellness services starting in 2018 for those meeting specific medical criteria. I believe if solid reporting and tracking metrics are established and given a two-year reporting window, this program will prove healthcare savings, medication reduction and greater disease management. I predict all insurances will cover medically supervised training and wellness services for, at the very least, those patients who are in at-risk categories in coming years.

***11) If you could do it all over again, what would you do differently?***

I would have set up EFT programs from the beginning and never sold bulk sessions. I would have had better incentive-based compensation plans for those team members able

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to learn how to play a significant role in growing our programs (we lost a few good people due to this single factor alone). I also would have had only 45-minute group trainings and boot camp programs and 30-minute one-to-one sessions from the beginning as it was very hard to change compensation or payment plans after the fact without negative ramifications.

### ***12) What are the biggest mistakes you have made?***

As I've shared, we made several mistakes along the way. A big mistake we made was in not investing in more high-level coaching and turn-key programs from the start for other department leaders. This would have saved us from several costly mistakes while instead developing critical skills of the leaders of our company. Other than just one such investment has paid 10x the cost of the program. Investing in high-level coaching is crucial for sustainable success and compressing the learning curve.

The largest error we made was having our patients submit letters to insurance providers on the benefits we provided them with our cash-based services in medical fitness, functional medicine and regenerative injections. In 2013, we lost half our insurance contracts due to this - it nearly cost us everything. Currently, we are back in network with all but two payors. Unfortunately, we have helped fewer people due to this mistake and took a major hit to our then-projected growth goals. Now we clearly have a *"this is not covered"* conversation with patients and we have shifted our practice to a larger share of cash pay. We like keeping insurance because many office visits, labs and traditional care that we offer are covered. That said, cash services reduce the cost of business and we believe it to be better medicine, in many instances. In the future, many of the cash services we currently offer will be covered as the evidence is too strong and consumers are demanding these healthcare options. We are not sure we desire that at this time as the

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reimbursement for PRP or stem cells may be drastically reduced when payors start covering these procedures. This will reduce quality when physicians without the proper training start performing these procedures. The pioneers of regenerative medicine have had years of training while bringing this medicine to the point it's at today; if insurers reduce reimbursement and/or physicians who do not have comprehensive training enter the field, it could have negative consequences for everyone.

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## Chapter 9: The 10 Most Frequently Asked Questions

### *1) What is the investment needed to effectively start a medical fitness program?*

Multiple options are available when it comes to getting started. I would base this decision on the following four factors.

- Space:

- 1) Does your existing medical practice have a small room with enough space to house a startup training facility? If this is the case, then the startup capital needed will be much smaller than investing in a standalone location.
- 2) If there is no room in your current facility, there is always the option to rent or lease from an existing facility such as a gym, training facility, or a dance studio. This will keep start-up costs low.
- 3) A standalone facility will require the greatest investment, but will allow the most growth potential (other than owning or leasing a space) scalable enough to handle a fully operational fitness and medical facility.

If you are seeking the lowest startup costs, the ideal place to start your program would be in your own facility. It could be in a small room with hardly any startup fee; this is where the Implementer builds up a patient base before another MFS is needed. It's ideal if you have enough space in your existing facility to have everything under one roof. This makes sales, startup, and the cross-referral process much simpler. It's also easier for the patient and makes it possible to bill for more services while a physician is present. Unfortunately,

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the ability to expand our clinic was not an option, so we had to lease a standalone facility as we grew.

When having all services under one roof is not an option, you could enter an agreement with a small local or box gym as independent contractors within the facility. You would either pay a monthly rent or you would pay a membership fee per client. We have created win-win agreements that help secure gyms to allow our medical practices to start these relationships.

Once you have reached a certain level of patients and your rent from the current facilities is close to what you would be paying for a standalone facility, it's time to start researching and locating potential sites for your new location provided you have major growth plans. The previous model can keep you at very low risk and maintain profitability to give you the opportunity to be certain before taking this next step.

When seeking a standalone facility, it's important that you build a relationship with your realtor. Explain that you are a new facility in need of starting out on the most modest budget possible. This way, your realtor is looking for the most affordable starting point available. Your location does not have to be commercial unless you have the budget for it. It could be industrial because you are looking for the least minimal startup fee possible.

When meeting the owners of the property, it's important to "sell" the owner on your purpose. Share that your facility will help change the lives of many people, bring more traffic to the area, increase value of the immediate proximal area and bring vitality to the area by becoming a local hotspot, attract more interest/referrals to the area, and increase the property's retention rate. Ask the owner what they feel would be fair for the startup cost. There are many options to help with the startup costs so being resourceful will be advantageous. Many owners will pay the first and last month's rent, pay the build out cost

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or other creative options to fill some of their empty space(s). You can also negotiate a lower start rate that increases as your profits increase (a step-up plan) and cap off at a certain rate or percentage.

- Equipment costs:

In the small room where we started, we had a cable cross machine, Bosu ball, yoga mat, set of interchangeable free weights, three resistance bands, and one treadmill. In location number two, we did not incur costs as we used the equipment at the local gym where we provided personal training. We have started programs with as little as \$1,000 in equipment. This is not the ultimate factor for success because you can do functional training with minimal equipment. As revenues come in, your practice can add more equipment to enhance the program platform.

When we created our standalone location, we researched 'Used Gym Equipment'; this is how we purchased all our equipment at 60% off retail value. We chose the colors and equipment we wanted and paid \$64,000 in equipment worth well over \$160,000. I highly recommend that, as soon as you choose a location, you place your order promptly; our experience was the equipment we ordered took three months to arrive from the date of our order.

- Fixed expenses:

Fixed expenses are the known and inflexible costs of doing business, such as your rent, salaried wages, insurance, utilities, employee benefits, office expenses, advertising, telephone, internet, computers, QuickBooks, accounting, bad debt, bank charges, dues and subscriptions, conventions, workman's compensation, legal dues, repair, maintenance, and any lease on equipment.

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Many entrepreneurs overlook the miscellaneous expenses and do not budget appropriately; this is a leading reason many small practices and businesses fail.

- Cost of goods sold:

The cost of goods sold (COGS) for a services business is represented by the wages you pay your MFS team members. You will compensate them only as they see each patient until your operations get to the size of having full-time positions. Cost of goods sold also includes your physical goods sold, such as supplements or pro shop items, payroll tax, and inventory. Cost of goods sold are not a direct expense and they always increase as you grow. You'll find that your payroll and cost of goods sold is always chasing your revenue. Typically, I like a higher COGS if set up properly, and I look to find methods to reduce fixed expenses.

After reviewing the four factors, you can easily predict how much startup capital you will need. If you choose to build right away, join The Small Business Association to help secure capital for your facility if you don't have the credit to secure a loan. If you are already established, it should be easy to get a business loan from your local bank. If building, there are several loans and tax incremental financing options you will want to explore to save the most money. If you have the reserve capital, it could be started with minimal startup costs, but your monthly operations budget will be anywhere from \$4-8k/month if properly investing in the launch of the program.

If you are starting with one of the first two options (leveraging an existing facility), you will not need much capital to begin. A loan or available cash flow between \$25,000-\$50,000 will get you the necessary equipment, cover your fixed expenses and your cost of goods sold. If you have the right Implementer and infrastructure as explained in this book, you will start seeing a return on your investment.

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If you plan on starting with the standalone facility, I recommend allowing for about \$30,000 for every 1,000 square feet of studio space. We required about \$180,000 to build out and fund a 6,400-square foot facility when we factored in all costs.

We had \$15,000-\$20,000 set aside for our first three months of marketing and overhead. We also set aside three months of fixed expenses in case of slow growth for any unforeseen occurrences.

Due to the amount of startup costs in the first year, we averaged an \$8,500 a month loss at the standalone. This figure does not include the approximate average of \$67,000 a month in new revenues the medical practice was earning with new and repeat patient services generated from the fitness center.

Very few business models can show a profit in the first year; this model is going to revolutionize the medical field in the next decade. The Affordable Health Care Act will be eyeing to cut costs and implement new strategies to help patients improve the quality of their life. Medical fitness will be the preventative model that will play an important role in the future of healthcare. This model will help change thousands of lives. It gives our team the opportunity to make a difference, and that is the fulfillment we seek together at Rejuv, MedFit and HealthOvators.

## ***2) What are the Stark and anti-kickback considerations with this program?***

I assume most people reading this book belong to a clinic or a hospital setting that may have many of the legal protections already in place. I will touch on some of the basics, but most of this will pertain to the medical fitness side of a practice. Each state is different, and

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it is highly recommended you seek legal counsel for the proper state and federal regulations that may be applicable to you. The medical fitness model can work for several types of medical practices, although you may have different legal rules and regulations for compliance. Our set-up works as a specialty clinic in sports and orthopedics and operates with a medical fitness component.

If you are starting your entire practice from the ground floor, your business must be incorporated as a separate entity that you have or would be starting. An example of having a separate business would be something like, “*doing business as Joel Baumgartner*.” This is an absolute must to protect you and your family's assets from any potential legal or financial disputes. It is recommended that you meet with a lawyer and accountant to see which structure is best for your company; different types of corporate structures are beneficial, depending on your business plan.

In many instances, if a partnership is in place, there needs to be an exit strategy, and an option to buy-out must be in a legal agreement that also states all parties and their responsibilities, stake, and share. This can be accomplished with your attorney and/or LegalZoom.com. I strongly recommend securing a medical attorney to draft all legal documents.

Earlier, I stated the importance of understanding the STARK and anti-kickback regulations in your state. This is a necessary component with this type of model. We have assisted many in navigating the very specific questions that need to be asked to satisfy your state's guidelines in determining ancillary revenue sharing and referral processes.

Typically, your team of employees will fall under your medical malpractice insurance. It is recommended you encourage all your service providers to seek additional liability insurance to protect their own personal interests. There are several agencies that can help find the best fit for the size and scope of your practice.

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An affordable way to set up proper human resource services is to start with a company like Bergan KDV, Paychex, ADP or others not mentioned here to ensure you adhere to the rules and regulations of your state for payroll and employee benefits. How you categorize your employees is very important. This is something we provide as consultants, but the content is too broad to go into detail in this book. When your growth allows you to hire an in-house HR team member, all your infrastructure would be in place waiting for that person to handle.

### ***3) How soon can I expect to make money with a medical fitness program?***

Depending on your startup costs, I have seen a few groups be profitable in month one if their facility was in-house or they were using another gym. We have customized projection forms to project break-even points; we will take you through step-by-step based on starting costs and chosen growth model. I like to put my break-even projections at the one-year benchmark; however, I suggest creating capital over a two-year break-even to prepare for the worst-case scenario.

Some people who are new to business are under the impression that simply opening a business is enough to become profitable and making a decent living in no time. Yes, that is possible: however, that is not typical reality. Frequently, the owner will need to be paid last to properly invest in the resources required to grow a thriving business. I also ask potential investors to try to live a minimalist life while in the early years of business. Ask yourself: What is the essential income or money you need set aside to live off for a period of at least 12 months? If the means are not available to do this, you may need to consider obtaining capital for starting their practice. Instead of pulling money away from the business, you will want to add to marketing, equipment, staff, and create an infrastructure that will allow you

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to continue to grow and create a profitable business. I strongly believe that investing in yourself and your practice is better than putting money into savings or other investments in which you don't have full control. Even though I have contributed to investment vehicles, I would rather invest more into myself and my company than the stock in some company I do not personally lead or govern. I strongly state the importance of becoming confident in your ability and what you can produce. When you adopt this mindset, it can take you to the next level quickly.

#### ***4) Can my PT director or Administrator run the program?***

Yes. Anyone can oversee the program and I recommend you have multiple team members who understand the program. However, the success of the program hinges on the person who is going to sell prospects into programs, network in the community and execute the marketing plan. The person running the program must have more than patient care skills by having the ability to produce results while thinking and operating like a successful business owner. The ability to sell and develop other leaders is a driving force for building a sustainable and successful practice.

#### ***5) Is medical fitness covered by insurance companies?***

The answer is both Yes and No. When patients use clinical services, like office visits and labs, they are typically covered. If the patient is injured, Physical Therapy, office visits and procedures are covered if the practice carries insurance. If a patient has any diagnosis, such as obesity, diabetes, metabolic syndrome or similar, the provider(s) will create a letter of

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medical necessity so patients can use their health savings accounts or flex dollars. The personal training services would be covered in this instance: however, most training and health coaching is usually all cash pay. As mentioned earlier, CMS will use the Diabetes Prevention Program to pay for training and wellness services for patients meeting specific criteria.

***6) Will the use of these systems help my entire practice?***

Yes, without a doubt. In fact, when we first perform a discovery session with potential practice partners, or program participants, we do the practice assessment mentioned in this book to understand where they are at with their current operations. We created “The 5 Pillars of Practice Success” that includes all the necessary elements for a successful practice. We often have people who join our program go through the first three pillars before we encourage them to start the Medical Fitness I.M.P.A.C.T. Plan. All the pre-work curriculum will lead to a practice that is built with a proper foundation.

Experience a Discovery Assessment by going to this website: [Take your 5 Pillars of Practice Success Assessment](#). Post-completion, we will go over in detail the first three pillars to determine your viability for adding the Medical Fitness I.M.P.A.C.T. Plan to your current practice.

***7) Can I talk to others who have successfully implemented the Medical Fitness IMPACT program?***

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Yes, we have both graduates and current affiliates who are enthusiastic to share their success, challenges and benefits of adding medical fitness to their community and how it might benefit you to do the same. Contact me and I will put you in touch with someone of your similar specialty.

***8) Can this work for my practice model?***

We believe it can work for most medical models. Exercise, nutrition, and mindset are keys to overall health. I don't want to say that it will be successful for all, given there are many factors involved and I prefer to thoroughly assess each practice who is considering such a model to ensure they are seeing the whole picture.

***9) Can the Medical Fitness IMPACT Plan be effective and worthy to put in all of our clinics?***

Yes. We offer a reduced license fee for each additional location (beyond the first). If the director is overseeing additional locations, there will be no extra coaching fees associated with future locations. I have one franchise group that just implemented the Medical Fitness I.M.P.A.C.T. Plan in their first location with plans to extend to each location. I have another group that is in the beginning phase of breaking ground with their growth strategy in multiple locations.

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***10) What are the program fees if I request your services or join as a participating practice?***

This is not an easy answer on paper; it is ideal to have a Discovery Call to give you the best idea of your options. Nearly half our affiliates started the process of working the first three Pillars of “The Five Pillars of Practice Success” to establish a foundation for success before integrating medical fitness. Our fee is \$1,600 per month for our coaching program. Most of the program follows an online curriculum, meaning you can systematically and quickly adjust our forms, templates and materials and rebrand to then implement into your clinic or practice.

Once we have made headway and most of your foundation is in place, we start the Medical Fitness I.M.P.A.C.T. Plan. The “done for you” program license is \$15K, which also includes the website build-out. If you spent three months previously coaching, we reduce your license fee by the \$4,800 that was your original interest in joining us, but we must make sure your practice is prepared for growth and scaling. After this timeframe, you would continue the coaching fee as well at the \$1,600 a month investment.

Once you have been with us for 12 months, the coaching fee drops to \$500 a month and you will stay locked in at that rate if you desire. Because this is a license program and not a franchise, you can discontinue the coaching anytime you feel you can operate successfully on your own. On two occasions, groups have purchased the license only as they felt they had the team to operate the program successfully on their own. Personally, I think it’s a mistake to drop the coaching as my team and I continue to invest in high-level coaching and masterminds to stay current with the best marketing and automation secrets in the industry. We bring everything we learn to our affiliates to help create health worldwide as

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we are committed to knowledge-sharing. (Why spend your money and take downtime for travel, etc. when you can get the distilled, relevant information as part of our programs?)

You should know that when we get to 100 locations, the one-time license fee will increase to \$20K in recognition of the previous and on-going investments we have made, both in the thousands of hours and hundreds of thousands of dollars, compiling this life-changing program. We have priced ourselves within a reasonable means for any serious practice or business owner. We have focused on mastering our delivery and system to better provide success for all our affiliates. From the bottom of our hearts, we thank each pioneer who has taken the leap with us - all in the effort to fix a broken healthcare system and create health in our communities and throughout the world.

We offer four incentives to affiliates seeking to reduce overall investment:

1) Fast Action Scholarship: We believe fast and imperfect action is a key to success. I'm not talking about being sloppy and not doing your due diligence on any investment; instead, this means trusting your gut, taking daily action towards your goals and dreams and always course-correcting quickly to stay on-track. This is a little uncomfortable for some physicians; however, you don't have other physicians critiquing your programs. Consumers don't want perfect or pedestal-topping pictures. They want solid content, relatability, emotional connection and you. Those who start after the strategy call, which is the call after the Discovery Call, awards new participants with a \$2K Fast Action Scholarship. Even if you're not ready for the Medical Fitness I.M.P.A.C.T. Plan and need a few months of pre-work before full participation, we will discount your license fee when you are ready to fully begin the program.

Each of our programs come with a full money-back guarantee; if after three months, you do not feel 100% comfortable that we are going to make your practice successful or, for

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whatever reason, we do not over-deliver on what we have promised, we return your money. We have never had this happen, although we put it out there because we are not short-sighted or choose to operate within our core values (including integrity).

2) Paid in Full: Any program participant who pays in full will receive \$3K off the full investment.

3) Out of Country Discount: It is our goal to spread the Medical Fitness I.M.P.A.C.T. Plan worldwide so the first affiliate in any new country (not yet represented) outside the U.S.A. will receive a \$2K discount.

4) Referral Program: Once we have proven our value to you and you recommend us to any clinics that join our mission via our programs, we provide you with a \$1K referral bonus. That escalates by \$500 for each additional affiliate who joins after your first referral.

Each of the discounts and incentives can be combined to minimize your investment.

We are commencing a franchise in 2020. To that end, we are diligently beginning the process now. The difference in this model is our partners must take our name and we will execute the marketing, billing and management process versus simply giving all our materials, coursework and coaching for the practices. This will come at a higher expense, including the yearly franchise fee and royalty fee; however, we will be providing much more hands-on service. We plan to continue to offer our license model with all the same

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value; nevertheless, the franchise will have much greater brand recognition, marketing and management value.

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## Chapter 10: The 5 Myths of Medical Fitness

There are myths that prevent physicians, practice owners and healthcare professionals from adopting medical fitness in their businesses. Let's go through the top five so they don't stunt your business growth.

### **1) Adding medical fitness to the practice will take too much time for the physicians and/or business owners.**

The physicians, business owners and/or providers see the patients that the program generates but have very little to do with the operations or success of the program. The Implementer and fitness team will handle nearly all the execution.

However, if the owner/physician will create videos or emails modelled from our templates, success will be accelerated for the community to understand your brand. I worked with one practice that did not want new patients as the practice was completely full; the reason she started the program was as a concierge service to give her patients better outcomes and provide additional ancillary income. She realized she was not capturing a revenue source that she was actively telling each of her patients to do... exercise and health-focused nutrition.

The one thing we encourage our providers to do in the room that takes about one minute is to ask two questions as a vital sign in the Electronic Health Record:

1) *"On Average, How Many Days Per Week Do You Engage in Moderate to Strenuous Exercise (Like a Brisk Walk)?"*

2) *"On Average, How Many Minutes Do You Engage in Exercise at This Level?"*

GOAL: 150 Minutes/ Week of Moderate to Intense Activity

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After that, we provide a physical hand-out to Rejuv University and offer a free Medical Fitness Test Drive.

**2) Patients won't be compliant so why encourage them to eat healthy and exercise?**

In medical journals and reviews I have read, I see this garbage message all the time. To me, it's an excuse to ignore our obligation as medical providers to enlighten patients about their health risks and help enlighten them towards a better life. *Patients Who Were Counseled by Their Physician Were More Motivated to Attempt Weight Loss and Had a Better Understanding of Their Health Risk and Were 3 Times more Likely to Attempt Weight Loss than Those Who Reported Not Receiving Advice.* (JAMA. 1999; 282:1576-1578)

**3) There is little money to be made with medical fitness.**

We can show that nearly 60% of all our income stems from medical fitness. Throughout each of my speaking opportunities and travels, I have yet to see a solo owner/independent practice with as much success, growth and impact as ours in such short time frame. Waite Park, Minnesota and the surrounding area where we are from is not very large. The median income is \$47K and it is a very conservative market. I will agree the fitness side on its own is not going to make you rich. It can provide impressive cash flow and net income if you acquire the right person and follow our guidelines. The greatest benefit the Medical Fitness IMPACT Plan will provide is growing your practice with motivated patients who are actively working to get healthier.

**4) People can't afford cash-based services, and/or my market is not right for medical fitness.**

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Show me any area where people are not going to gyms, hiring personal trainers, or spending their money on things to try to make themselves better. People want health and happiness - they just don't always know how to get it. You can put any quality fitness professionals from anywhere in the world together and we (including myself) could grow a successful program. It will be the capability of the person selling the program to provide the hope and the possible transformation with prospective patients that will make any program successful.

I hear the same excuses about regenerative medicine and functional medicine from doctors who say that people can't afford their services. You/we must look in the mirror. I'm not talking hard sales! I'm referring to helping people have what they want and generating results. You want me to prove you wrong? Hire me to come to your clinic, put your patients in front of me for any of your services and I will help them get started (provided I understand your program and how it improves quality of life for people). I could never sell something I don't fully believe in my heart can help someone as that would go against my core values; when I (or you or anybody else) operate outside that realm, it is not good for the soul.

## **5) Medical Fitness is very easy to make work in any practice.**

I have provided each one the primary contributing factors in this book to guide you to success. That said, I can't call it "easy" because we have been diligently committed over a decade to pull this together. We have invested hundreds of thousands of dollars and as much or more in our time to do it. We have made mistakes and taken left-turns that cost us in tangible dollars. At the same time, it has been easy to work so hard because of the passion we have for the services we are providing and the transformations we are helping our patients live every day.

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You will need to grow. Your staff will need to grow. You will all likely get a little uncomfortable along the way. It's simple - but I would not call it "easy". But, for me, nothing truly worthy happens without feeling the burn.

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## Chapter 11: The Benefits of The Medical Fitness I.M.P.A.C.T. Plan

As a quick summary, here are the key takeaways that can bring this all together for you.

- 1) Create real health for patients by aiding to reverse chronic disease and improve outcomes in clinical settings.
- 2) Make an undeniable difference in your community and, thus, be the “go-to” within your niche.
- 3) Lead the mission to change the direction of our healthcare crisis by being proactive in adding conservative, integrative and preventive medicine through nutrition and medical fitness services.
- 4) Mission and purpose driven TEAM that is on fire to make a difference.
- 5) It is easy to add to any current clinic size if there is existing office or physical therapy (PT) space.
- 6) Adding medical fitness has low overhead options and virtually no risk propositions.
- 7) You don’t have to build it - the Implementer leads the implementation.
- 8) Build a practice that isn’t fully dependent on provider income!
- 9) DECREASE the need for MEDICATIONS that DON’T address the root of medical issues.
- 10) Diversify and build a practice that is cash-model friendly.
- 11) Outcome and bundled payment models are the future.
- 12) Create constant new referrals to your existing practice.
- 13) Medical fitness is an incredible marketing and patient attractor for your practice.
- 14) Medical fitness attracts a highly motivated population that naturally yield enhanced patient experiences and outcomes.

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- 15) There is extreme cross-referral synergy that benefits all departments in your practice.
- 16) Medical fitness patients become lifelong patients. Because you change their lives, your patients will become your best fans and raving advocates.
- 17) Medical fitness clinics can use a position of authority to attract patients into a practice using medical oversight USP (unique selling proposition).
- 18) Medical fitness compliments a current medical practice to increase revenue and attract/convert new patients. Medically supervised weight loss captures an untouch market.
- 19) Stay a step ahead of the competition by being the first in your market to offer medical fitness. Differentiation is essential in a competitive niche.
- 20) For the first time, CMS will utilize the "Diabetes Prevention Program." This insurance program will cover wellness services for patients with pre-diabetes, diabetes and metabolic syndrome. By adopting this model, you are poised to help more people who will have funding for the services they need to change their lives and sustainably up-level their health.

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## Chapter 12: Why Is Now the Time to Add Medical Fitness?

- 1) The health crisis and obesity epidemic is here to stay until preventative measures are put in place and better utilized.
- 2) The rising costs to practices will only continue. Practices will continue to be pressured to see more patients; passive income streams will need to be maximized.
- 3) Consumers are seeking better care and looking for solutions that improve outcomes and not just another cover-up.
- 4) The opportunity is now to create change in a several hundred billion dollar per year weight loss industry. Physicians have an unrivaled unique selling proposition (USP) that leverages their expertise and authority with patients.
- 5) Those who win in the stock market can see emerging trends and gaps; likewise, such visionaries can see there is a significant shortage and demand for preventative services.

The mission of this robust and transparent overview is to provide you with the vision and key elements you need to add medical fitness to your practice. Join us in being part of the solution, and not a part of the problem in creating an environment that our patients and loved ones can thrive in.

In Friendship,

J.R. Burgess

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## About the Author

J.R. Burgess, M.S., is the CEO of MedFit and Rejuv Medical. He is also a husband, father, coach, two-time #1 bestselling author and international speaker. JR and Dr. Joel Baumgartner partnered to innovate a healthcare model that reverses and prevents chronic pain and disease. Their regenerative healthcare model includes non-surgical orthopedics, functional and primary care.



Successful outcomes have been proven to be driven by medical fitness. JR and Dr. Baumgartner believe that healthcare without exercise and solid nutrition as the foundation is not healthcare. They have played an integral role in replicating their proven model in more than 74 clinics worldwide. Each clinic aims at redefining healthcare as well as empowering medical leaders and patients to co-create health and impact the world.

JR wrote the bestselling books, *Medical Fitness Impact Plan* and *Cash Practice Success: How to See Half the Patients, Increase Your Income, Eliminate Insurance and Practice Medicine that Restores and Regenerates Health*, both of which continue to be resources for practice owners and wellness professionals who are consciously choosing to build their practice.

JR lives in Minnesota with his beautiful wife and four amazing children. He gives gratitude daily for the challenges that, ultimately, made him who he is today.

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