

# Coaching, Marketing, and Sales in Clinical Practice

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*"The secret of getting  
ahead is getting  
started."*

-Mark Twain



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# Establishing Your Functional Medicine Practice

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## Establishing Your FM Practice: Checklist

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- ☐ Setup functional labs (see handout)
- ☐ Setup supplements (in clinic or dispensary)
- ☐ Prepare your patient forms (e.g. symptoms survey and anti-inflammatory diet patient handout)
- ☐ Integrate FM with current services or schedule a separate day/s for it
- ☐ Insurance, cash, or both


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## Establishing Your FM Practice: Checklist

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- ☐ Insurance, cash, or both
- ☐ Membership, pay as you go, or packages
- ☐ Are you offering free 15 minute 'meet and greet' consultation?
- ☐ Which condition would you like to focus on?
- ☐ Promote your services and attract new clients
- ☐ Engage your clients and stay in touch

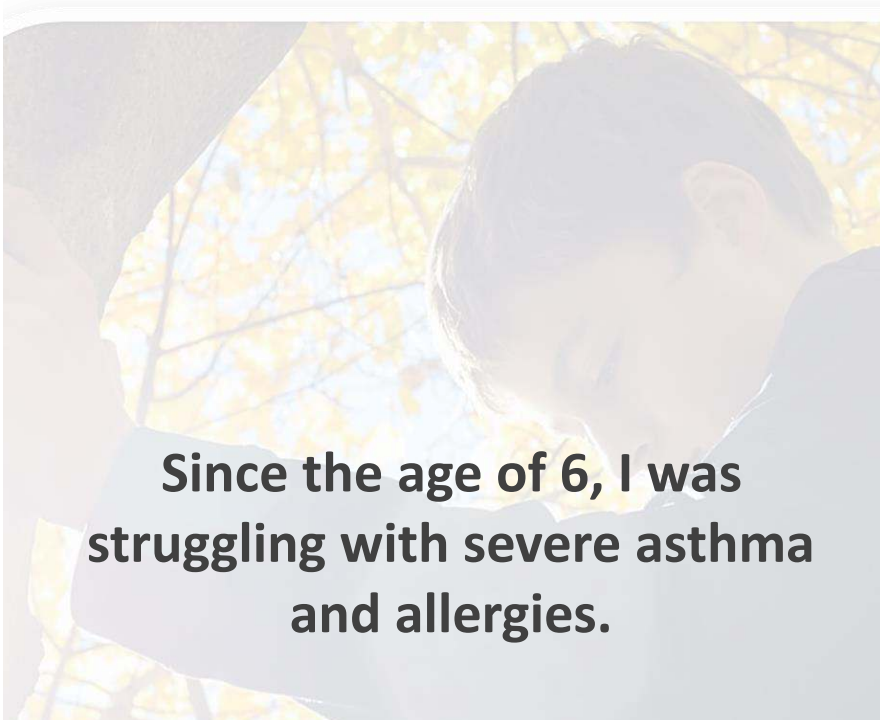
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What is Your  
story and  
mission?

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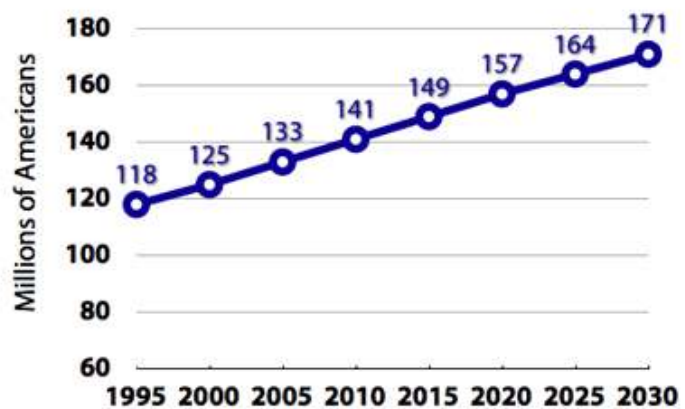
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Changing  
healthcare.  
One  
patient at  
a time.

### Prevalence of Chronic Disease in the U.S.



Source: Wu, Shin-Yi *et al.*, 2000. Projection of Chronic Illness Prevalence and Cost Inflation. RAND Corporation.

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# Why is your story and mission so important?

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Your story will help patients to connect with you.

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***"A vision is not just a picture of what could be;  
it is an appeal to our better selves, a call to become something more."***

—Rosabeth Moss Kanter,  
Harvard Business School

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" Facebook's mission is to give everyone in the world the power to share, and to make the world more open and connected. Connecting the world is one of the fundamental challenges of our generation, so this is a long-term effort. As long as we stay focused on that mission, we're going to keep attracting talented people who share the same goal and want to make it a reality."

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*“To organize the world's  
information and make it  
universally accessible and  
useful.”  
(Google)*

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# Mission statement vs Vision statement

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## Mission Statement

*“Our mission is to feed America’s hungry through a nationwide network of member food banks and engage our country in the fight to end hunger.”*

## Vision

*“A hunger-free America.”*



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Using your story and  
mission or vision  
statement to  
understand your  
patients

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## THE CHALLENGE!



Patient Care Specialist

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The biggest challenge a Patient Care Specialist has is to change the patient's mindset (and associated behavior).

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## Marketing your Functional Medicine Practice: How to Get New Patients

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## Attracting new patients

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- Start with who is your target audience?
  - Who would you want to work with?
  - Who will benefit from your skills, knowledge, and services?
  - Who will appreciate your skills, knowledge, and time you put into their care?
  - Who can afford what you are offering?
  - How can they afford your services?

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Your marketing and communication should be geared towards them.

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*It's all  
about them.*

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*Talk about  
the benefits  
of your  
service, not  
features.*

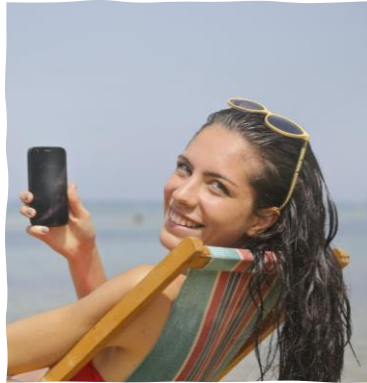
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**It's about the destination and experiences,  
not the way to get there.**

Talk about the benefits of your service, not features.



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## Attracting new patients



### **Paid advertising**

Facebook marketing  
Google and Bing Marketing  
Youtube videos



### **Free marketing**

Facebook or Instagram posts  
YouTube videos  
Local events, e.g. lecture at the public library  
or support groups (in-person or online)

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## Your Client's First Impression of you



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*“A stunning first impression was not the same thing as love at first sight. But surely it was an invitation to consider the matter.”*

Lois McMaster Bujold

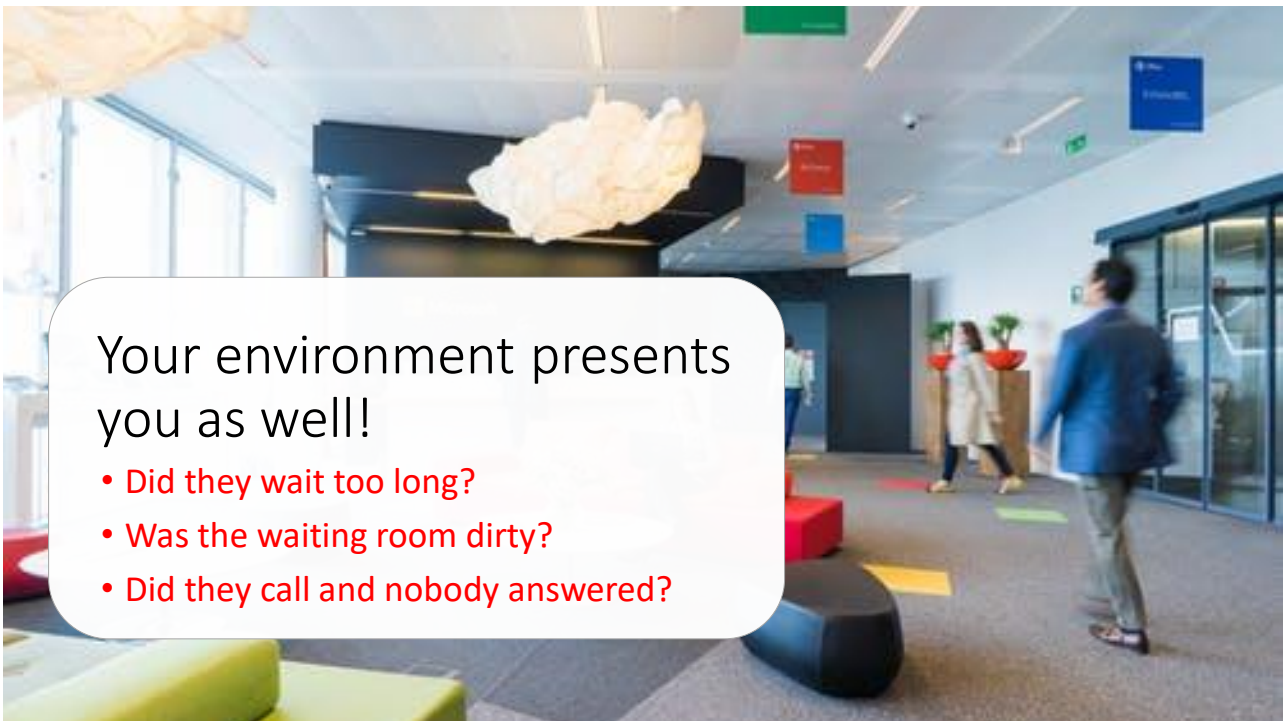
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# Your Client's First Impression of you...

- Starts with your website
- when they call your office
- When they are greeted by your team
- When you walk into the room
- With the way you listen to them
- When you make recommendations or prescribe a treatment

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## The Patient's Story & Motivational interviewing



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### The Interview Process:

1. What are their challenges?
2. How is that effecting their lives?
3. Show compassion ("I am so sorry to hear that")
4. Be engaged:
  - "I understand. If I was in your place, I would be concern too."
5. Are they concern about how the future looks like if they will not resolve these issues?
6. What are their health goals?

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*“Sales is not about selling anymore, but about building trust and educating.”*

– Siva Devaki

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Promote your services by educating your client about possible solutions.

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## How to guide and teach your patients if you don't have the time:

- Consider hiring a health coach or nutritionist
- Record your educational material and share it with your patients (on your website or a separate link)
- Give them handouts

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What might that be?



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## Goals For Your Meeting With Patients

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- ✓ Listen
- ✓ Build trust
- ✓ Be confident
- ✓ When possible, give them hope
- ✓ Provide them with value, even if it is a short 15 minutes session or consultation
- ✓ Share your recommendations for care (including time frame, what needs to be done, cost?)

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## Follow-up and Remote Engagement

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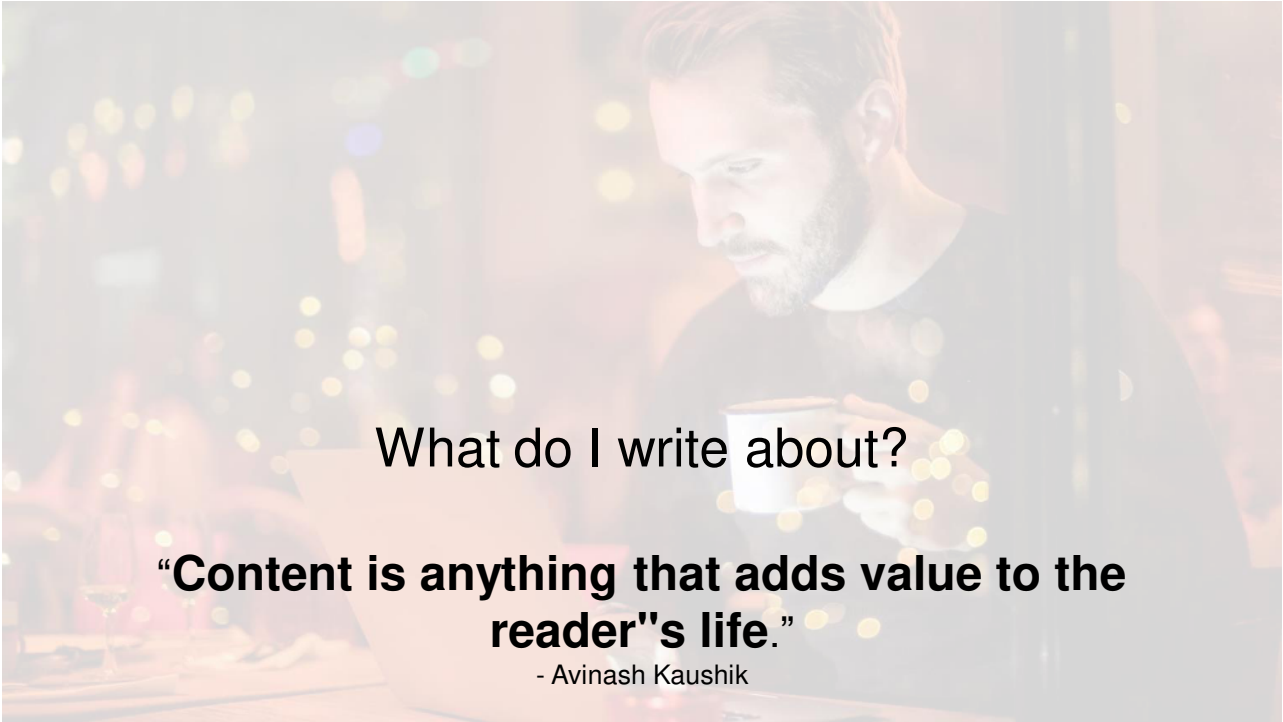
### Engaging & Staying In Touch With Your Patients (on autopilot)

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- Email marketing is the most simple, affordable, and effective way of communication.
- A great way to remain in your clients' mind, increase awareness, and get them engaged.
- Write one or two days a month and schedule it to go automatically.

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What do I write about?

**“Content is anything that adds value to the reader's life.”**

- Avinash Kaushik

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## Topics to think about:

- FAQ you patients ask you
- Current interest, e.g. 3 ways to support healthy immune system
- Topics or key words your audience is looking for, e.g. How to treat type 2 diabetes or what are the signs of arthritis
- Let them know about a new training you had, new service, a promotion, or a new lab you started offering
- Supplement or nutrient of the month, e.g. importance of vitamin A
- Finish with an invite to reach out to you if they need your service

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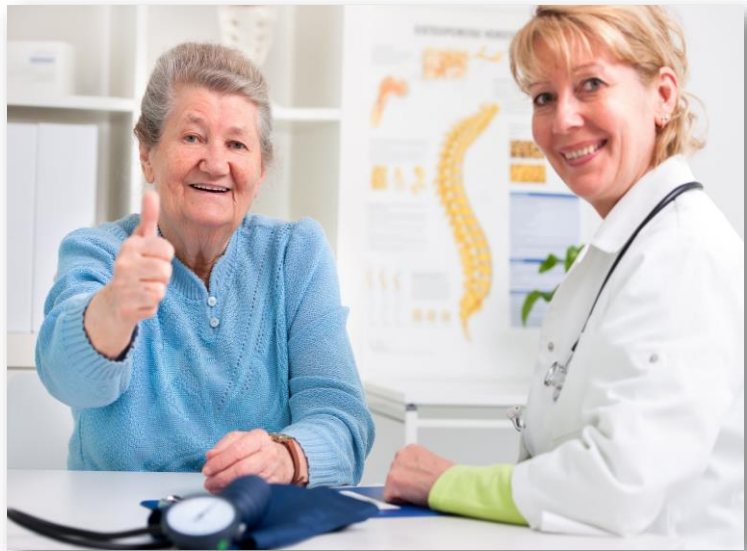


*"The successful warrior is  
the average man, with  
laser-like focus."  
-Bruce Lee*

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