



Your best clinical practice

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What's in this handout?

1. What is the purpose of your business?
2. Services you offer
3. Clinic space
4. Delivery & Systems
5. Marketing & Networking
6. Future Proofing
7. Creating your best clinical practice



1. What is the purpose of your business?

- End Goal
- What type of Naturopath are you?
- Strengths, vulnerability & boundaries
- Generalist or specialist
- Don't get stuck, re-assess as you develop



End Goal

- What type of business do you want
- Income
- Work hours
- Transitional goals
- New services
- Solo clinic or multiple practitioner
- What does success mean to you? What does it look like?
- Balance of work and family life

1. What is the purpose of your business?

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What type of Naturopath are you?

- What do you offer now?
- What do clients or patients say about you?
- Your impact - One on one or group sessions
- What clients or patients gets you excited?
- Solo or multi practitioner clinic
- Is it a job or a calling ?

1. What is the purpose of your business?

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Strengths and vulnerabilities

- Personality and behavioural type
- Skills set
- Communication Style
- What is your sacred purpose?
- What part of your business don't you like?
- What are your current limitations?
- Needs & Non-negotiables
- Professional block?

1. What is the purpose of your business?

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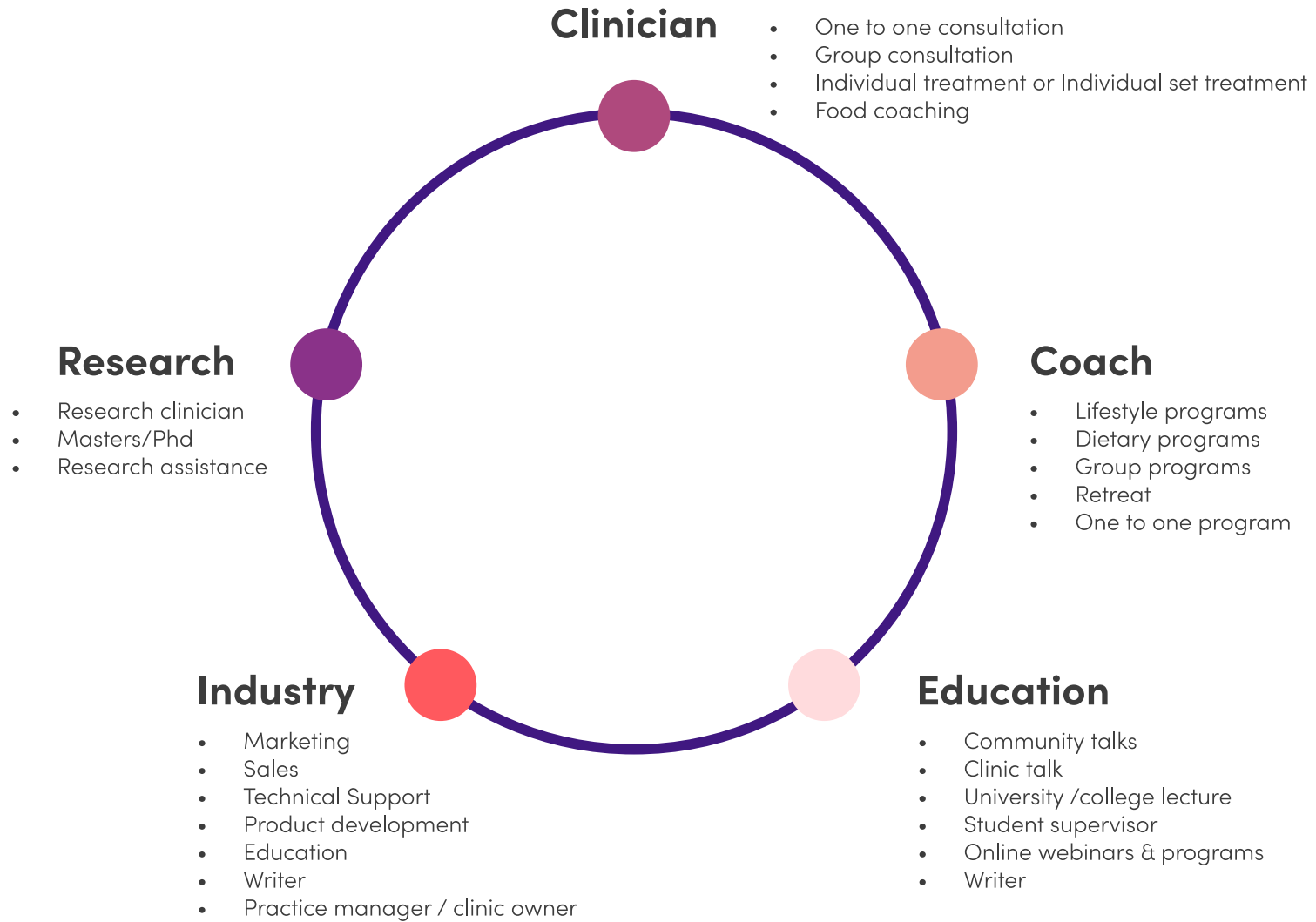
Niche or generalist

- Analyse your current clinic
- What are you attracting?
- Generalist or Niche
- Find your Avatar
- When to niche?

1. What is the purpose of your business?

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2. Services you offer





3. Clinic Space

- Physical
- Online Space
- Hybrid
- What environment do you work best in?
- What type of clinic space best suits your current career profile?
- Rented or shared
- Owned space



4. Delivery & Systems

- Patient and Naturopath experience
- Practice Management Software
- Managing a dispensary
- Clinic systems
- Staffing
- Website

Patient Experience

Enquiry	Booking	Intake	Impression	Appt	Treatment	Follow-up
<ul style="list-style-type: none"> • Website • WOM • Social media • Referral • Google • Phone • Foot traffic 	<ul style="list-style-type: none"> • Phone • Email • Messenger • Online booking • Staff booking 	<ul style="list-style-type: none"> • Intake Forms • Process • Automated or on the day • Expectations 	<ul style="list-style-type: none"> • Style of clinic • Online /clinic • Presentation • Meet & Greet 	<ul style="list-style-type: none"> • Appointment Process • Be consistent • Professional boundaries (clinician, coach etc) 	<ul style="list-style-type: none"> • Prescription • Supplements • Clear & consistent • Paper or paperless 	<ul style="list-style-type: none"> • Rebooking & follow-up • Offering access to other options
<p>Paper Clinic OR Practice Management System</p>						

4. Delivery & Systems

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Patient Follow-up Options

Follow-up	Food coaching	Pathology	Programs	Programs	Socials	N Program
<p>Typically</p> <ul style="list-style-type: none"> • 3 week follow-up • 4 weekly x4 • 6 weekly x3 • Every 4-6 months 	<p>Blocks of 4</p> <ul style="list-style-type: none"> • 10min appt Food only 	<ul style="list-style-type: none"> • Long appointment 	<p>Self-paced lifestyle</p> <ul style="list-style-type: none"> • Gut health • Food • Education • Rest & Repair 	<p>Self-paced wholefood</p> <ul style="list-style-type: none"> • Gut health • Food • Breakfast • Snacks & Treat • Meal Planning 	<p>Encourage</p> <ul style="list-style-type: none"> • Facebook, Instagram • Private interest group • (Navigating program) 	<ul style="list-style-type: none"> • Join 12 week niche program retreat etc
<p>Paper Clinic OR Practice Management System</p>						

4. Delivery & Systems

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Naturopath Experience

Forms	P/S	Education	Listen	Questions	Treatment	Finish
<p>Intake forms 24hr prior</p> <ul style="list-style-type: none"> • Questionnaire • Symptom Q • Mood Q • Food Diary • Pathology • Marketing 	<p>Primary reason for appointment</p>	<ul style="list-style-type: none"> • Explain how I work • Clear framework of my expectations & what the patient is seeking 	<p>Spend time being fully present (listen, look & feel)</p>	<ul style="list-style-type: none"> • Go through questions and intake form • Be very thorough, consistent & flexible • Physical exam • Pathology discussion 	<p>Patient Health Summary Request</p> <p>Prescription</p> <p>Send for pathology</p> <p>Email lifestyle homework and welcome pack</p>	<p>Rebook and payment</p> <p>Upload supplements on vital.ly or sell in clinic</p> <p>Offering access to website</p>
<p>Paper Clinic OR Practice Management System</p>						

4. Delivery & Systems

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Systemise email and letter templates

- Practice Management Software make clinic life easier
- Patient handout email templates
- Pathology Email Templates
- New Patient Initial Confirmation Email Template
- Prescription & Online Ordering Template
- Welcome pack Template – ebook, recipe book, homeplay focus
- Owned space

4. Delivery & Systems

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4. Delivery & Systems

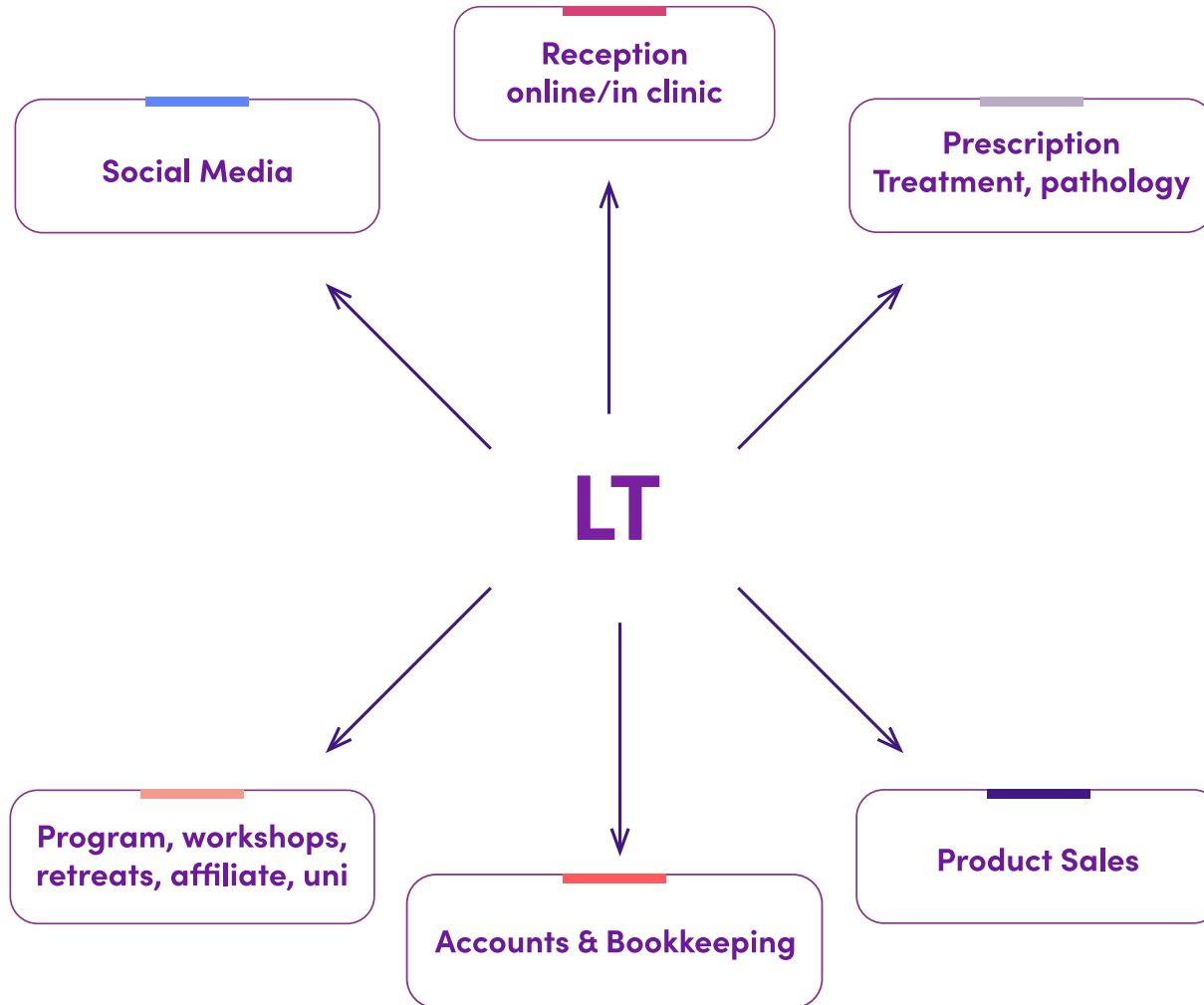
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Managing a dispensary

- In clinic – Physical dispensary
- In clinic – Online through your own website & delivery
- Third party – Physical dispensary
- Third party – Online

Remember staff cost to operate dispensary takes from your profit

- Crunch the numbers
- Factor in operating hours of dispensary
- Factor in delivery overheads



4. Delivery & Systems

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Staffing

- **General roles of Staff – In clinic, VA or shared reception**

- Answering phones
- Making appointments – for new patients and follow ups
- Greeting/looking after clients/Taking payments from clients
- Uploading scripts into vital.ly

- Explaining the online ordering system to clients

- Answering emails/sending emails

- Setting up patient files for the next day's consults/Checking pathology is in

- Scanning any paperwork

- **Specialised roles of Staff:** Important to delegate strengths of staff

- Accounting & stock ordering/Setting up new software and looking after it/typing/marketing



4. Delivery & Systems

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Website

- **Be clear with the role of the website**

- Info only - Landing page is great and cheap

- Provide patient info

- Capture emails

- Sales page

- Shopping cart

- Host programs

- Booking system

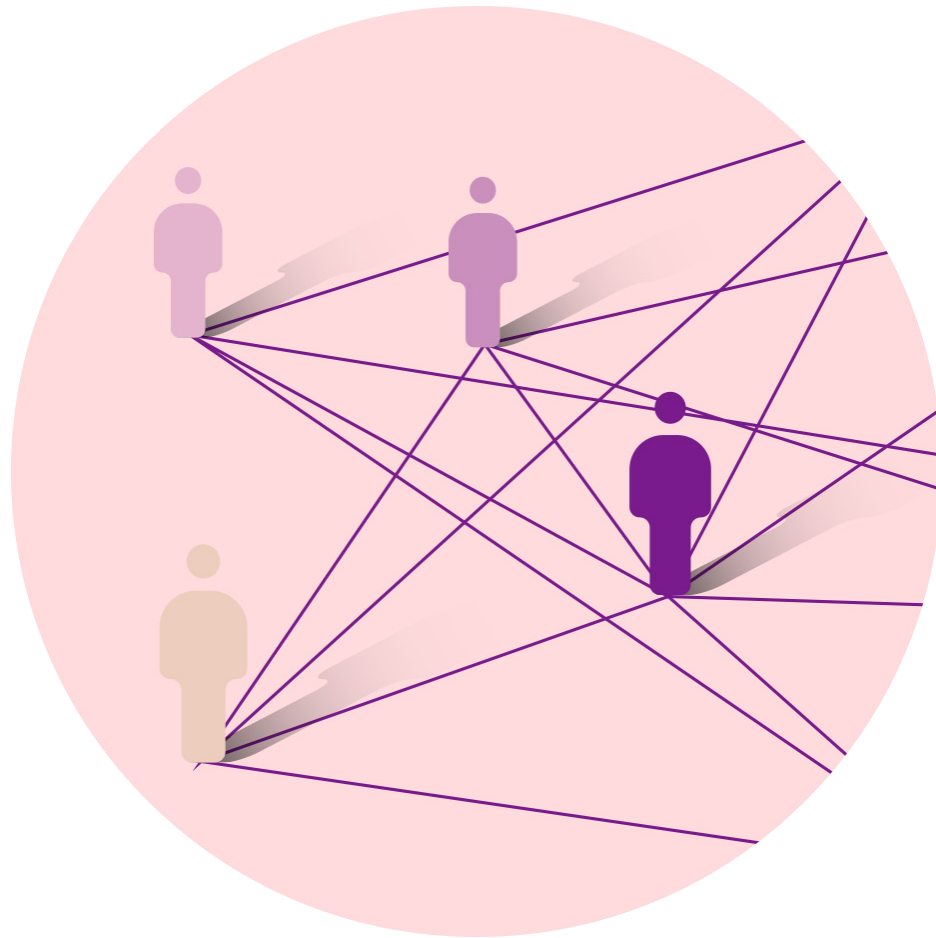
- Ecommerce page

- Get help -[upwork.com](https://www.upwork.com)



5. Marketing & Networking

- Patients offer the best referral network
- Branding - be clear with your message
- Networking & Referrals
- Be consistent and loyal
- Give to receive
- Crunch the numbers
- Factor in operating hours of dispensary
- Factor in delivery overheads



Patients are the biggest referral network

- Be authentic, be good at your skill, be professional and consistent

Professional development

- Women in business, public speaking, mentor programs

Professional relationships

- Write to GP and allied health professions, professional organizations (NHAA, ATMS, CMA), industry professional pages, contribute

Keep your message clear and consistent

- Socials, website, community

5. Marketing & Networking

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6. Future Proofing

- Multiple streams of Income
- Invest time into the business weekly, monthly seasonally, yearly
- **Audit the services**
 - Improve efficiency first before expanding
 - What is working and why
 - What is not working and why
- **Professional development**
 - Business, clinical, mentoring, public speaking must be inline with your business goals
- **Professional relationship**
 - Write to GP and allied health professions, professional organizations (NHAA, ATMS, CMA), industry professional pages, contribute



• **Staff**

- Keep staff active and rewarded, focus on their skills, delegate

• **Accounting**

- Keep on top of it, daily, weekly role

• **Data collection**

- Make sure intake forms has a marketing element

• **Client retention**

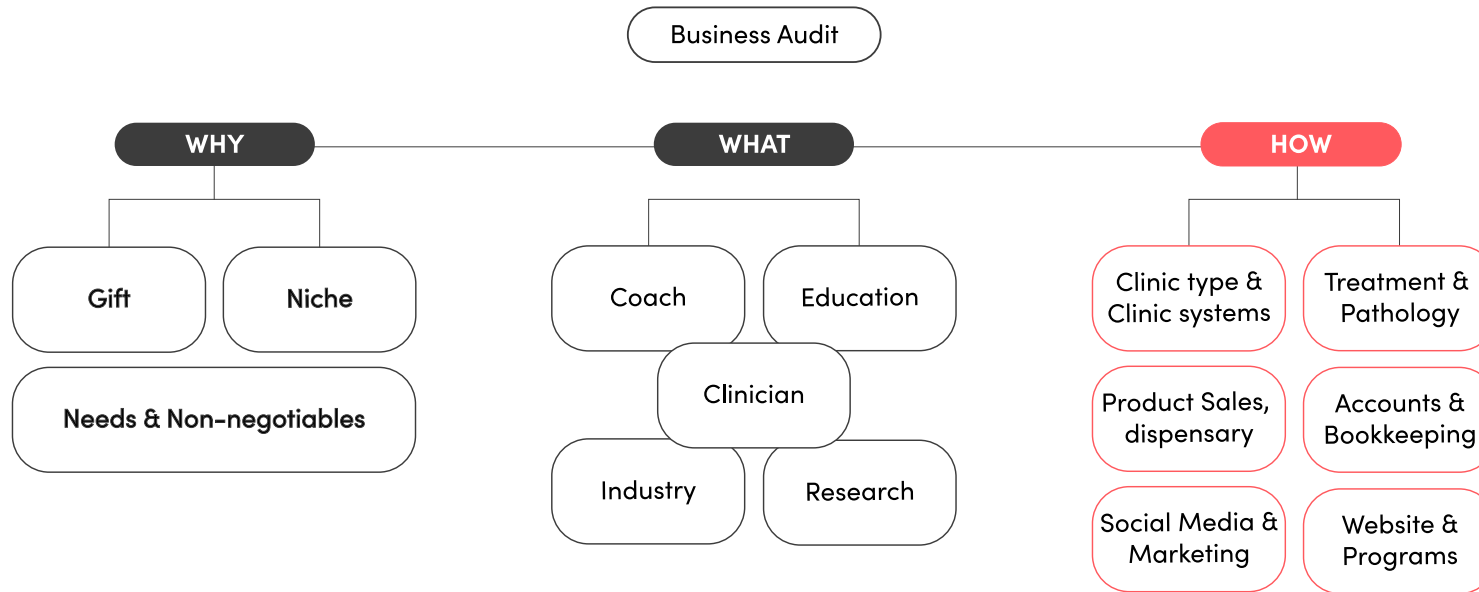
- Be authentic, clear on your role, boundaries, delivery, outcome and keep the relationship
- Working with difficult patients

6. Future Proofing

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7. Creating your best clinical practice



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Business Audit – **WHY Assessment**

- **Gift**

- **Myer-Briggs, Truity** – Free Big Five personality Test [truity.com](https://www.truity.com)
Enneagram
- **Sally Hogshead** – Marketing Focus. [howtofacinate.com](https://www.howtofacinate.com)
Meditate, Lifetime Journal

- **Niche**

- What are the current trends in your clinic?
- Reflect and journal your ideal client. What do you get excited about in your current clinic?
- Meditate and ask yourself, work with a coach

- **Needs & Non-negotiables**

- Naturopathy is a profession not a charity
- What do you need to earn? Be clear with what you need and are worth.
- What are your current lifestyle and work needs

7. Creating your best clinical practice

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Business Audit – **WHAT Assessment**

• Clinician

- Be clear what a healthy balance is for you.
- Is your gift to listen to people's problems and take them along their health journey as a clinician?
- Do you have clear boundaries and meet people where they are at?
- Are you OK if they don't do their homework and keep going off track?
- Do you like keeping up with the pathology, latest research and interventions?
- Spend money and time being good at your trade.

• Coach

- Do you prefer to be the motivator, the positive light for people to follow?
- Is your personal journey and experiences a big part of the services you offer or the language you use?
- Is lifestyle medicine an interest or expertise?

• Education

- Do you want to share your knowledge to your community, industry or wider audience ?
- Do you like writing and developing programs?
- Do you like delivery in them or are your skills better behind the scene?
- Are you a great clinician and want to share your knowledge?

• Industry

- Can you balance your clinician life with an industry company or collaborate your skills with another clinic?
- Are your skills in marketing, sales, office/practice management, branding or writing?

• Research

- Are you experienced clinician and want to validate or explore the evidence in your program or clinical expertise?
- Do you see yourself as a researcher?
- Do you like reading and writing ?
- Are you wanting to contribute to the industry via research?

7. Creating your best clinical practice

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- **Identify & prioritise** the area of focus
- **Create a plan** and stick to it a good start is a clinic systems audit
- **Being clear with your WHY** and making business decisions will be much easier and clearer

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