

Course Overview - Part Three

We'll talk about how to structure your practice, including policies, procedures, new patient intake, patient flow as they move through the practice, scheduling, tracking patient progress, and staffing. This stuff is maybe not the sexiest material, but it really can make or break a practice. My own personal experience definitely confirms that. When I first started out, I was a solo practitioner. I just had one staff person that was playing a number of roles, everything from bookkeeper to practice manager to patient navigator. That worked pretty well for a while, but as my practice started to grow and expand and I partnered with another physician, Dr. Schweig, and started the California Center for Functional Medicine, we just grew so quickly that it got away from us and we weren't able to provide the level of service that we wanted to provide. We didn't have the foundation and structure in place that could support the number of patients that we had and the level of growth that we experienced, and it definitely led to some significant growing pains.

It was really hard and painful for me to see how dissatisfied many of the patients were and to know that in my heart I was doing my best to provide the high-touch, high-quality experience that I always wanted to provide and had provided, so I basically put all of my energy and attention into figuring out how to structure the practice in a way that could support that level of service and future growth. I spent tens of thousands of dollars consulting with procedures and systems business development consultants developing a systematic methodology to streamline everything, to develop written working procedures for how to do everything that we did, which made hiring new people easier.

We really dramatically transformed the practice, and now we'll frequently just hear out of the blue from patients about how thrilled they are with the experience of being a patient and how it's the best patient experience they've ever had. The staff is much happier, all the clinicians are happier, and the patients are happy. So I know how difficult it is, and I also have been through it and spent all the time and energy and money to figure it out so you don't have to. I'm going to pull the curtain back and share everything that we learned, including all of the written procedures that we developed for every aspect of how we run our business, which makes it vastly easier for you to get up to speed and also for you to hire and train new staff people. This includes everything from new patient intake forms to operating procedures to FAQs for how to do lab tests for patients because that can be confusing, to handouts for you and handouts for your patients. It's really a whole practice system in a box.

We'll talk about how to leverage the latest technologies for maximum efficiency and cost savings. In the last few years, there's been an explosion of tools available, but it can be hard to know what to use if you haven't done all of the research. I'm kind of a tech nerd myself, and I'm really interested in how to use technology to create not only a more efficient and cost-effective model, but one that better serves the patient and creates a higher-touch kind of environment and level of care. I've easily spent probably a hundred thousand dollars figuring this out over the years, and you're going to benefit from my missteps and also the things that I've learned along the way. We'll

cover the best options for electronic health record, or EHR; accounting; bookkeeping; video conferencing; virtual PBX, or phone system; collaboration tools; in-house chat, which is crucial if you have a virtual team; and other back-end systems.



Module 1
**Introduction &
Key Concepts**



Module 2
Exposome



Module 3
GI Disorders



Module 4
HPA Axis



Module 5
**FX. Blood
Chem**

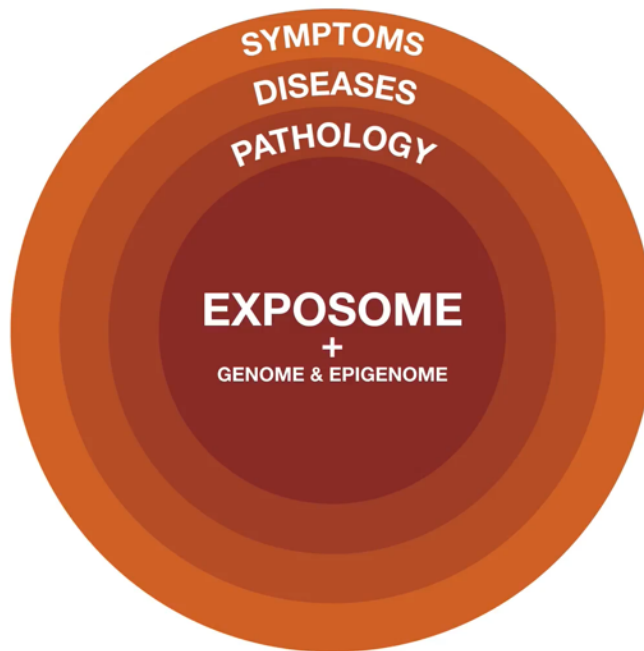


Module 6
**Practice
Management**

All right, now that we've covered the objectives and the overview of what you'll learn, let's take a closer look at the content breakdown.

The training is broken into six modules. The first is introduction and key concepts, the second is the exposome, the third is the HPA axis, the fourth is GI disorders, the fifth is functional blood chemistry, and the sixth is practice management. Let's look at each of these in a little bit more detail, and then make sure to check out the handout that we've included on learning objectives.

In the introduction and key concepts section, we'll cover the basic concepts and framework that inform an effective approach to functional and evolutionary medicine. You'll understand the key differences between functional and conventional medicine; why an evolutionary or ancestral perspective is important in patient care; how recent discoveries in genetics, epigenetics, and the exposome inform patient care; and how to structure and layer a treatment using the ADAPT Framework model.



In the second section on the exposome, you'll understand the key principles of a nutrient-dense ancestral diet; which nutrients require supplementation and how to obtain them; the importance of personalization; essential interventions for stress, sleep, and physical activity; minimizing toxic exposure; and hardware and software tools designed to maximize compliance and success. As you can see here, this is a systems model of functional medicine that I created, and it's really meant to represent the hierarchy of things to address when it comes to approaching a patient from a functional medicine perspective.

The exposome—and everything that we just mentioned that fits into that—and how that interacts with the genome and epigenome is really at the core of this model. It's always the starting place with patients, and that's why it's so important and why it's an absolutely critical part of the ADAPT Framework.

In the section on the HPA axis, we will talk about how changes in the HPA, or hypothalamic-pituitary-adrenal, axis contribute to health and disease and how to discuss this syndrome or framework with your patients and with other clinicians. Up until very recently, and still in many areas of functional and alternative medicine, the phrase “adrenal fatigue” is used to talk about this. Unfortunately, that's a bit of a misnomer because more modern research using better tools has shown that what is typically referred to as adrenal fatigue, which suggests that the adrenals are no longer able to produce adequate amounts of cortisol, is actually quite rare. In many cases, the problem is more either too much cortisol or a problem with the metabolism of cortisol or an issue with the cellular receptivity to cortisol, where the receptors become insensitive, so it's kind of like cortisol resistance, or a maladaptive communication between the hypothalamus or pituitary or adrenal glands and the thyroid and gonads, which are part of that axis as well. We're going to look at a much more evidence-based current model of “adrenal fatigue,” which I refer to as HPA axis

dysregulation, and talk about how to use the most current testing methodology to identify problems there and address them effectively.

We'll talk in Unit Four about gastrointestinal disorders. You'd have to have been living in a cave not to know how critical gut health is to overall health, and it's a huge focus even in the conventional media now. There has been a series of mainstream books that have been published on the microbiome and its importance to health and disease, and if you've been doing this work already for some time, you'll know how common gut issues are and how important they are to address in terms of resolving any type of health problem—and even if a patient doesn't have gut symptoms. In the ADAPT Framework training, you'll understand the crucial difference between gastrointestinal disease or syndrome, like irritable bowel syndrome, IBS, or GERD, and pathology, which is the underlying cause that leads to those symptoms and syndromes. We'll talk about diet and lifestyle factors that lead to GI pathology. We'll talk about the core pathologies that underlie all gastrointestinal disorders. We'll talk about how to use functional stool, urine, breath, and blood testing to identify pathologies; how to design dietary and lifestyle protocols; and how to use herbs, supplements, medications, and other treatments to treat pathologies and restore proper gut function.