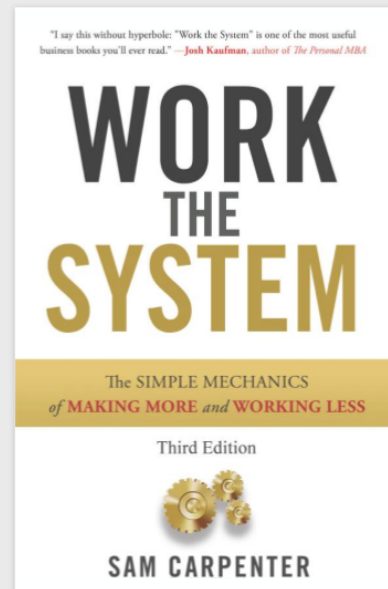


PM: Back-End Documentation

Hey, everybody. In this presentation, I'm going to talk about systematizing your practice procedures for maximum efficiency. We've already discussed the Work the System methodology, and I've delivered written working procedures for various aspects of running a practice throughout the practice management section of this course.

The Simple Mechanics of Making More and Working Less



Work the System methodology was created by Sam Carpenter, an entrepreneur who was working 80-plus hours a week and became overwhelmed by the complexity of his business. He had an epiphany where he realized that most of the things that happen in his business were repeatable, systematizable tasks. If he could write them down in explicit detail, this would have several effects. First, it would dramatically reduce mistakes. If he or an employee was doing the task, they would just have to follow a procedure, not reinvent the wheel each time and remember everything that needed to be done. Second, that would make his business more profitable because he could hire lower-level staff members to accomplish tasks that are documented because they don't need the same level of creativity, autonomy, and skill or experience to handle higher-level, non-repeating tasks. Third, this would significantly cut the time it takes to onboard new hires because they would have detailed procedures to follow. Fourth, it would ensure that operations and activities of the business are consistent with its established goals and visions.

Another central idea of the Work the System methodology is to be a fire preventer rather than a firefighter, so this means setting things up so they run smoothly in the first place rather than being stuck in a constant state of reactivity and damage control. Work the System has been invaluable to

us at CCFM. I was a solo practitioner for the first part of my career, as many of you know, and then decided to join forces with Dr. Sunjya Schweig to create CCFM in 2014. Since then, we've continued to grow at a breakneck pace, and early on, we really struggled to keep up with this growth. Things were falling through the cracks. The response time of admin staff and clinicians to patient questions was getting too long. Mistakes were being made, and everyone—staff, clinicians, and patients—were suffering the consequences. I knew we had to do something differently because things were not headed in the right direction, and we were in danger of coming apart at the seams.

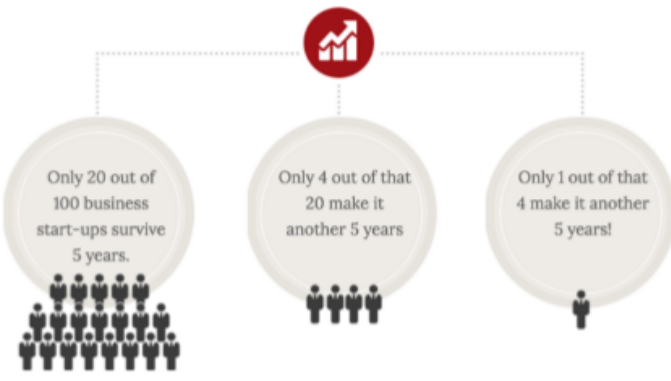
Of course, the two most common reasons that small businesses fail is that they don't grow fast enough or they grow too fast. Either of these can be a significant problem, and the latter was the bigger issue for us. This is when I discovered the Work the System methodology, and I hired Josh Fonger, who is Sam Carpenter's right-hand man, and spent thousands of dollars and many hours with him guiding us on implementing Work the System methodology at CCFM. It was a complete game changer. We now have a response time that is less than 24 hours to patients, in most cases. The patients are really happy about this, and the staff and clinicians are much happier as a result. When we hire a new employee, onboarding takes a couple of days instead of several weeks, and all of this is because we have detailed, written working procedures for every aspect of the business.

There are a few ways to work with the Work the System methodology. The first is a DIY approach where you buy the book, follow the instructions, and set things up yourself. You can use the working procedures we're providing from our practice as a fantastic starting point, and this may be all that many of you need, at least initially, if you're motivated and you have time.

WORK the SYSTEM ACADEMY

THE SIMPLE MECHANICS OF MAKING MORE AND WORKING LESS

CONSIDER THESE STAGGERING FACTS



Only 20 out of 100 business start-ups survive 5 years.

Only 4 out of that 20 make it another 5 years

Only 1 out of that 4 make it another 5 years!

Is your business on life support, slipping gradually towards oblivion on its way to becoming just another statistic? Or, is it just stuck and there seems to be no hope for relief?

Fortunately, there is a way to turn things around before it's too late...

I will show you the exact, proven blueprint I used to transform my failing business into a money-generating machine that only requires 2 hours of my attention per week!

The second is something called the **Work the System Academy**, and I pictured that here on this slide. It's a guided class with 19 lessons, email support, templates, etc., to help you get started, and it's \$200, so really affordable but it provides a little bit more structure to the process so that it can keep you on track and give you some accountability. Third is working one-on-one with a Work the System coach like Josh, which is what we did. Of course, that is the most expensive version but the one where you get the most personal attention.

Given how much of our own Work the System methodology that we're delivering to you, it's unlikely you'll need coaching unless you are a large and fast-growing clinic that has special needs, as we did, or if you really just need the accountability and structure that one-on-one coaching and guidance offers, which is, frankly, quite valuable, especially when you're busy.

CCFM Strategic Objective

We work with patients (who frequently have complex medical cases) to prevent and reverse disease and optimize health using diet, lifestyle change, natural therapies, and functional medicine. We also sell supplements to consumers, and train other clinicians to practice functional medicine.

We leverage technology and documented systems to maintain low overhead and efficient operations. We hire experts in their respective fields that share our company values and who are committed to providing a high level of customer service. We provide a supportive work environment and prioritize work-life balance for ourselves and our employees.

We serve patients that are skeptical of or disenchanted with mainstream medicine, but are also skeptical of "alternative" treatments that lack scientific evidence; who think critically and appreciate thorough analysis and research; who are looking for natural solutions with proven results to their health problems; who are interested in the Paleo diet and lifestyle, organic food, non-toxic products, and natural supplements and herbs; who are interested in functional medicine; who live in the continental United States, are predominantly (but not exclusively) female and in the 25-55 age group, well-educated, and have sufficient income to buy healthy food and services. We serve this market because we are committed to helping people to recover their health so they can live their dreams.

We provide new options and directions for patients who traditionally have not been helped or served by the mainstream medical system. Frequently these are patients with health concerns that have eluded proper diagnosis and treatment.

We are known for our in-depth investigation and treatment protocols that provide patients with proven results. We have a unique ability to gather and synthesize complex case history data with comprehensive and cutting edge laboratory data, and communicate them in simple, practical ways. Patients appreciate our real-world clinical experience and our willingness to adjust our diagnosis and clinical plan when new evidence comes to light. We are committed to having open minds and being willing to question any conclusions and adjust our frame of reference in response to new or changing information. We strive to be knowledgeable and flexible at the same time. We are committed to improving the health of our patients as the primary outcome.

Our staff is conscientious, accountable, responsible, detail-oriented, self-directed, and committed to providing a high level of customer service.







































































Our business makes decisions quickly because our strategic objective is clear, and we have documented systems to enable staff to act independently without micro-management. Our employees respond as soon as possible (with a maximum of 24 hours, excluding weekends) in

CCFM Operating Principles

1. All Company decisions must conform to the Strategic Objective, Operational Principles, and Working Procedure documents.
2. We are committed to excellent patient care, and to serving patients with complex health care needs who have frequently not had their needs met by the mainstream medical model. In order to do this we use functional medicine, ancestral (Paleo-type) nutrition, dietary supplements, and lifestyle and behavior change. This commitment guides all other operating principles, and it is the basis of who we hire, how we treat employees, and how we interact with patients.
3. We deliver a **first-class, high-touch, memorable patient experience**. From the first time a patient contacts our clinic, to every touch point with providers and staff from then on, including patient portal, phone, or in person, we not only meet, but exceed expectations. The patient is not always right, but we make sure they always feel respected, valued, and taken care of.
4. **We take care of each other**. We treat fellow team members with respect, empathy, and consideration. We encourage each other to perform at the highest level by providing constructive feedback, moral support, or a helping hand when necessary.
5. **We hire A-list people that want to work for us**. We hire people who share our mission; who are driven to perform at peak capacity; and who are committed to continually improving and developing themselves professionally and personally. We encourage employees to innovate and think creatively and share their ideas for how to best achieve their work.
6. We stay grounded, focused, and **we are "problem solvers"**. If a problem arises with a patient, fellow staff member, or vendor, we address it immediately or bring it to the attention of someone that can. Problems are opportunities for creating a new system or improving an existing one. When a problem occurs, we think "thank you for this wake-up call" and take action to prevent it from happening again.
7. **We communicate openly and honestly** with each other and with our patients. Open and honest communication fosters connection, trust, and safety.
8. **Mistakes are opportunities for growth**. We embrace the saying "to stumble is not to fail; it is to move forward faster." Without the freedom to make mistakes, we cannot innovate, create, or grow. When a mistake is made, we don't hide it or attempt to cover it up; we learn from it and use it to improve our processes.
9. **We have a "can-do" attitude**. When confronted with a problem, challenge, or new idea, our first response is always to explore possibilities with an open mind, instead of

Regardless of which path you choose, the first steps in Work the System are not to start writing procedures but instead to develop your strategic objective and your operating principles. In strategic objectives, you explain what you do, what your overall goal is in specific language, and the strategy you will use to achieve that goal. You also highlight your systems focus, competitive advantage, explain your organizational layout, and discuss other aspects of your business that are important. The purpose of this is to be a living document that encapsulates the mission, purpose, and strategy of your business in one place. All new employees and current employees should have access to it, such as a corporate mission statement, but it's much more useful than a mission statement, and it's written in clear language. The operating principles are your staff members' guidelines for decision-making that will provide a framework for making moment-to-moment and long-term decisions. Where the strategic objective is the *what* of your organization, the operating principles are the *how*. It should be based on what you believe and how you think you can make your world superefficient. These are really kind of your personal rules of how you and your people will make decisions. I'm sharing our strategic objectives and operating principles for CCFM and also linking to the page on the Work the System site where Sam shares his company's versions as examples and provides instructions for creating your own.

I encourage you to develop your own strategic objective and operating principles using your particular goals, values, and preferences, although you're certainly welcome to use ours as a starting point or a way of spurring your own ideas.

Shared with me > CCFM WTS Documents > Onboarding New Patients		Shared with me > CCFM WTS Documents > Encounters		Shared with me > CCFM WTS Documents > Navigate the PPQ	
Name		Name		Name	
 Old Onboarding Procedure		 Process Appointment Encounters - SS.mp4		 Order Supplements	
 NP Onboarding Workflow		 Working Procedure for Follow-up Appointments week 21_proofed86		 Quest & Comm for Clinicians	
 CCFM WP #A: Outline of NP Onboarding Procedure		 Create Superballs.docx		 Upload Consents.docx	
 CCFM WP #G: NP Onboarding Process Registration Form		 Chart Prep: AN & CK Follow-Up Appointments		 Upload Forms.docx	
 CCFM WP #C: NP Onboarding from Initial Consult through Case Review		 Process Appointment Encounter: Initial Consults		 Upload Labs.docx	
 CCFM WP #E: NP Onboarding Initial Inquiry Follow-Up		 Process Appointment Encounter: Follow-Ups with Plan Items that Get Charged.docx		 Tag Consents, Forms, & Questionnaires.docx	
 CCFM WP #D2: NP Onboarding Initial Inquiry for Chris		 Process Appointment Encounter: Case Reviews.docx		 Order Prescriptions.docx	
 CCFM WP #D1: NP Onboarding Initial Inquiry for CCFM Clinician		 Two Open Encounters with Charges		 Send Messages.docx	
 CCFM WP #B: NP Onboarding through Booking Initial Consult		 Estimate Approvals.docx		 Upload Other Information.docx	
 CCFM WP #K: NP Onboarding Initial Consult Follow-up		 Retrieving Dictations for SS.docx		 Update CC Info.docx	
 CCFM WP #N: NP Onboarding Case Review Follow-up		 Process Appointment Encounter: Follow-Ups with No Plan Items and Items that do not Get Charged.docx		 Update Addresses.docx	
 CCFM WP #O: NP Onboarding Case Review Follow-up Call		 Estimate Modifications.docx		 Send Tasks.docx	
 CCFM WP #M: NP Onboarding Case Review CCFM Clinician		 Chart Prep: SS Appointments		 Start Notes.docx	
 CCFM WP #L: NP Onboarding Initial Consult Follow-up Call		 Inactivating Patients.docx		 Reorder Lab Kits.docx	
 CCFM WP #J2: NP Onboarding Initial Consult Chris		 Estimate Additions.docx		 Refunds.docx	
 CCFM WP #J1: NP Onboarding Initial Consult CCFM Clinician		 Chart Prep: Initial Consults		 Pharmacies.docx	
 CCFM WP #I: NP Onboarding Schedule Initial Consult Follow Up		 Chart Prep: Case Reviews		 Accept Faxes.docx	
 CCFM WP #H: NP Onboarding Schedule Initial Consult				 Declined Credit Cards.docx	
 CCFM WP #F: NP Onboarding EHR Registration				 Check Open Labs.docx	
				 Appt Requests.docx	
				 Add Handouts.docx	
Shared with me > CCFM WTS Documents > Schedule		Shared with me > CCFM WTS Documents > CCFM			
Name		Name			
 Schedule, Edit, and Cancel EP Appointments		 Setting Up and Using Ring Central			
 Schedule Video Appointments in Chron		 Initial Set Up of Ring Central			
 Reschedule CR.docx		 Setting Up Ring Central			
 Schedule CR.docx		 Add Charges to the Database			
		 Add CPT Options to the Database			
		 Add Supplements to the Database			
		 Sending Medical Records			
		 Create, Manage, and Use Chart Parts			
		 Create Invoices with Bill.com			

The next step is to start documenting all repeating tasks using written working procedures. I've put a screenshot here of some of our working procedures on this slide. You'll see they are quite extensive. They include onboarding new patients, processing encounters, navigating the PPQ, scheduling, and other miscellaneous tasks. We've been delivering these to you throughout the practice management unit, so you should already have a good sense of how they work and how to develop them. In this week's resources area, we'll deliver the remaining written procedures that we haven't given you yet. Frankly, this may not be the most fun thing to do, and it may seem like a lot of unnecessary detail work, but I assure you that it is worth the effort.

Okay, that's it for this presentation. I hope you get a lot out of these procedures, as much as we have, and they really help streamline your business, make it more efficient, and enable you to provide a higher level of service to your patients.