

Sample 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 healthcare 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 cared for.
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 and 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 who 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 fall; 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 shooting down ideas or finding ways that proposed solutions won't work. Rejecting ideas too early in the process simply ends the exploration and kills creativity.
10. **We are laser-focused and don't waste time.** While we value a can-do attitude and open-minded exploration of solutions, we also value staying focused on established priorities and goals. We say no to projects, ideas, and methodologies that aren't consistent with these priorities and goals, and we do not waste time on solutions or tasks that don't facilitate these priorities and goals.
11. **We operate the company via documented procedures and systems.** Any recurring problem can be solved with a system. Each employee makes time to create, implement, maintain, and revise our systems and procedures. If there is a recurring problem or task, a system or procedure must be created to address it. We do not, however, bog the company down with procedures for “one-off” or “once-in-a-while” problems or tasks.
12. **Our documented procedures are “off the street.”** This means that anyone with experience in a related position could perform procedures with minimal assistance or oversight and that new employees can be onboarded and performing their job within a short period of being hired.
13. **We aim for simplicity.** We create the simplest possible solutions to problems. We continually iterate and refine until we have the leanest, most efficient process for handling the operation of the business. We leverage the newest and best-available technologies to create simple and elegant solutions.
14. **We take responsibility and initiative.** If we encounter a problem, something that is out of place, or a loose end, we either address it immediately or we ask another team member to help. If it is a serious issue that can't be resolved by a team member, we report it to management.
15. **We double-check our work.** Before we do anything—from publishing a blog post, to charging a patient, to sending an email, to filing a tax report—we double-check our work to ensure that it is accurate and meets the standards of the Company. If this is not a personal habit, each employee will need to cultivate it. Double-checking should be performed by the person completing the task, his or her manager, or both.
16. **We strive for perfection—but we don't become crippled by it.** We aim to produce the highest-quality result possible in every task we do. But we never allow “the perfect to become the enemy of the good.” If a 98 percent effort meets the standards of the Company and pushing for the additional 2 percent will not be a good return on the time, money, or energy invested, we settle for 98 percent.

17. **We write and speak with care.** We are aware that how we sound and what we write reflects our deeper values and mission and is often the first experience patients, vendors, and others have with the Company. Mastery of the English language in written and spoken form is essential, and we are encouraged to develop these skills.
18. **We aim for *mise en place*.** *Mise en place* refers to “a place for everything, and everything in its place.” Within the context of our virtual business, this means that we make sure our software systems, documentation, and other tools are properly maintained, well-ordered, and functional. We have no figurative “cobwebs” or “messes.”
19. **We get the job done.** In a virtual environment that doesn’t always have set hours, this means meeting deadlines, doing what you say when you say it, responding to patient or team member inquiries within a maximum of 24 hours (excluding weekends), and approaching each work day with a focused and clear mind.
20. **We are committed to lifelong learning, improvement, and growth.** We hire people who value self-awareness and self-development and who continually pursue learning and growth, both personally and professionally.
21. **We value work–life balance.** We recognize that a healthy diet, adequate physical activity and sleep, stress management, play, and social support are vital to health, happiness, and productivity in the workplace. We support staff members in cultivating this work–life balance.
22. **We market and sell with authenticity and integrity.** We treat potential patients as we would like to be treated. Our marketing materials are professional and aesthetically representative of the quality of our products and services.
23. **We spend money wisely.** We are lean, efficient, scrappy, and resourceful, and we always seek to maximize return on investment. At the same time, we’re not afraid to spend money and take risks in order to grow and scale the clinic and the business.
24. **We treat our vendors with respect.** We rely on laboratory companies and distributors and manufacturers of supplements to be able to care for our patients, and we will always strive to demonstrate that we rely on and value relationships.
25. **We are a socially responsible business.** We seek to maximize profit in order to further our mission, but we never do so at the expense of work–life balance, authenticity, integrity, or our commitment to serving our patients. In other words, we don’t “sell out.”
26. **We invest in long-term growth.** We only pursue revenue-generating strategies that closely fit the values of the business and the needs of our patients. We would rather leave money on the table than do something that threatens our credibility or integrity. We will always decline a short-term opportunity—no matter how promising—if it might compromise our long-term growth.