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Remarkable Manuals

The Remarkable Practice has created a three-part series of Process and Procedure Manuals designed to help make your practice truly Remarkable!

**Remarkable (adj): Worthy of mention; notable; extraordinary**

There is a Remarkable Manual dedicated to each of the 3 Domains of your practice:

- **Part One: Remarkable Attraction**
- **Part Two: Remarkable Conversion**
- **Part Three: Remarkable Retention**

There is a dedicated DC and CA version for each domain.

Inside this Remarkable Attraction Manual, your team will find everything they need to be Remarkable: including the Procedural steps of each part of the TRP system, relevant scripts, forms, and references to the DC and CA Academy (see Module # for references) as well as the TRP Competency Check-Lists which serve as your "training syllabus" and training guide.

**Welcome to your Remarkable Practice!**
Remarkable Attraction

Overview: Attraction = Certainty (Module 67)

According to a study done by AARP, the top three qualities patients seek in a doctor are certainty, empathy, and passion. Certainty is the cornerstone of attraction.

- **Certainty:** a firm conviction that you know what you know
- **Empathy:** the ability to communicate that you understand what another is feeling
- **Passion:** a compelling enthusiasm or desire for something

There are four pillars, or sources, of certainty: philosophical, clinical, communications, and business acumen.

1. Philosophical Certainty
2. Clinical Certainty
3. Communications Certainty
4. Business Acumen

Be sure to review DC Academy Module 67 for a complete review and training on how to increase all 4 Sources of Certainty.
REMARKABLE MARKETING
Marketing Machine
(Module 4)

Your Remarkable Marketing Machine is how you are going to reach your goals. Here are three ground rules to keep in mind as you begin:

- Marketing Chiropractic is an Act of Kindness

Remember your Vision, your Purpose, your Mission and your Premise. “You can only help the ones that you attract!”

- If You Are Breathing - You Are Promoting

Focus on one thing: bringing chiropractic to your community. The #1 reason that people in your community are not coming into your office to get checked and adjusted is simply OBSCURITY! - people don't know why they should come to you - so tell them!

- You Are Not a Marketing Expert

In the real world, companies hire marketing professionals instead of one person trying to do everything - and the results show it!

There are five steps to creating a functional, sustainable marketing department.

Step One: Identify Your Four Pillars

These are the legs under your marketing platform. You can think of them as four channels for patient acquisition. You need to identify them so that you can focus your resources.

Example:

- Internal Marketing
- Outside Speaking
- Spinal Screening
- Passive Marketing

Step Two: Equip Yourself

Think about what you will need in each pillar to be successful. Think about systems, technology, budgeting, and people.
Step Three: Build Your Team

There are several key roles on your Marketing Team. (Keep in mind, often multiple roles may be played by the same person.)

**Marketing Director:** They are in charge of planning and strategy. This may be you. Often this person is in charge of Internal Marketing and Promotions (Internal Marketing Calendar).

**New Business Development Expert:** This is someone with professional sales training and experience. This person will add tremendous value - even if they are part-time (and on commission).

**Digital Marketing Expert:** again, this person has professional training and expertise. (This position is usually out-sourced to a contracted expert.)

Screening Team: a great screening team needs two sales people (Greeter and Screener), and one administrator.

Step Four: Create Your Marketing Plan

Write an actual plan. Start with outlines in chronological order, month by month, one for internal marketing and one for external marketing. Put these outlines into calendars, then translate the calendars into work flow charts. (See samples in the following pages.)

Start with an **Internal Marketing Outline**. Create from the top down, from big events to small. First, put in your biggest annual event. Then add quarterly advanced workshops. Then add any standing holiday events. Make sure 2 are Patient Appreciation Days.

Then you can move to your **External Marketing Outline**. Start with big annual events. Then add smaller annual events, then outside talks and corporate wellness fairs, then pencil in radio shows, teleseminars, or webinars.

Step Five: Move EVERYTHING Onto a Marketing Calendar

The spatial orientation of a calendar helps you grasp what's going on, especially once everything is on one Master calendar. Google calendar is a helpful tool, as is color-coding.

*For more on your Remarkable Marketing Machine, see DC Academy Module 4.*
# Detox Your Lifestyle

Find a buddy who can keep you accountable with your health and we will show you how to detox your lifestyle for a healthier happier you in the New Year! Refer your accountability buddy for a new patient exam to kick-start their detox, for only $47.
This month as we focus on love and Valentine’s Day, remember the health of your heart. Learning how to decrease stress WILL improve your health. And don’t forget to Spread the Love - give the gift of health to someone you love this Valentine’s Day.
## 2015 March

### Cabin Fever – Get Moving

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#### Notes

- Who’s tired of winter? We’ve had enough. Join us on March 16th as we celebrate the sun. Wear your Hawaiian shirt and enjoy a healthy “boat drink”.
- On March 25th, learn how to fight the cabin fever and move your body towards health at our GET MOVING workshop.
### Tax Season - Stress Prevention

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*During the month we will be teaching you how to better manage stress for healthier relationships and a healthier life – Don’t miss the Webinar and free chair massages. This month refer your family and friends for a new patient exam and be entered to win a free massage for you.*
# Overcoming Allergies – Who Do You Know?

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- Who do you know that is struggling with allergies? Is it a child, a coworker, a spouse? Don’t miss the Overcoming Allergies webinar!
- During the WEEK OF MAY 4th buy the gift of health for a Mom in your life that can benefit from Chiropractic Care. Gift them with our New Patient Experience for only $10 (a $285 value).
Give the gift of health to a Dad in your life with our New Patient Experience for only $21 (a $285 value).  
Register for the FFC 90-Day Challenge kicking off at the Hormones & Weight Loss Workshop.
## Independence From Pain

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- **Who do you know that is struggling to get their health back? Or maybe to stay healthy? Introduce them to the benefits of Chiropractic with our **Independence From Pain **webinar.**
- **Don’t miss our summer celebration here at the Cummings Center with a cookout and car show on Sunday the 12th. Fun for the family!**
Franson Family Chiropractic opened its doors at the Cummings Center in August, 1997. In honor of that special day, refer a new patient to the practice from August 17th to August 27th and we will donate their new patient exam fee to HAWC. It’s a win, win!
# Back to School Health

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## Notes
- Don't miss the Healthy Kids webinar and send outrageously healthy kids back to school.
- We will be performing free spinal checks for all kids from the community from Sept 14-Sept 24th. Help us help the kids!
- In honor of the 120th Birthday of Chiropractic all New Patient Exams this month will be only $18.
This month we are celebrating the incredible innate intelligence of our bodies. By removing the interference of spinal subluxation, toxic foods, and unhealthy lifestyles we allow our bodies to do what they do naturally...Heal Themselves!
We are collecting cash donations ALL MONTH so we can donate fresh, local, healthy food to The Beverly Bootstraps Food Pantry. We will contribute the proceeds from ALL New Patient Examinations performed in November towards the food drive.
During the month we will be collecting donations of new mittens, gloves, hats, and gloves. **We will gift a New Patient Examination in our office (a $285 value) to anyone who makes a donation.** Please help us help those in need this winter.
THE REMARKABLE PRACTICE ACADEMY
JANUARY MARKETING MAP

JAN WEEK 1: LAUNCH PREPARATION & PROMOTION

1.1 SEND LAUNCH EMAIL
1.2 MESSAGING / MARK FOR EVENT
1.3 REACTIVATION CAMPAIGN
1.4 WEEKLY COFFEE BREAKS
1.5 LAUNCH GOOGLE CAMPAIGN

JAN WEEK 2: LAUNCH PROMO CONTINUED

2.1 LAUNCH 2 VIDEO TESTIMONIAL CHALLENGE
2.2 WEEKLY COFFEE BREAKS

JAN WEEK 3: JANUARY MARKETING PLAN & LAUNCH PARTY PREPARATIONS

2.3 REACTIVATION CAMPAIGN
2.4 MONITOR ANALYTICS / ADJUST CAMPAIGN
3.1 CONTINUE CHALLENGE
3.2 WEEKLY COFFEE BREAKS
3.3 WEEKLY WORKSHOP

JAN WEEK 4: FINAL LAUNCH PREPARATION

4.1 FINAL PREPARATION FOR LAUNCH
4.2 EXPERT BUNDLES FOR FEBRUARY

JAN WEEK 5: LAUNCH PARTY

5.1 LAUNCH PARTY AT THE OFFICE
5.2 LAUNCH VIDEO WITH JON BUTCHER
5.3 TALK TRACK - ENERGIZE PATIENT BASE
5.4 CAPTURE TESTIMONIALS

• "I Need Your Help..."
• Be a great PT, refer, screenings, talks...
• Landing Page Gift Certificate
• Continue mail Campaign
• Invite to Launch Party
• Direct Mailer to Inactive List
• Establish out talk
• Screenings
• Corp Wellness Leads

• Special Reports on Headaches, Back/Neck Pain, Allergies
• Landing page mails
• Survey

• Patient Orientation
• Brilliant OR Foundations

• "Let's start a MOVMT in 2014!"
• 15/20 by 2015
• Get in front of 15% of the population in a 20 miles radius by 2015
• Screenings
• xternal Talks
• Generating Referrals
• Teleseminars
MAR WEEK 1: PLANNING, PREP AND PROMO FOR DINNER TALK / WORKSHOP

1.1 UPDATE LIST OF BUSINESSES FOR EXTERNAL TALKS
1.2 HOLD A SPINAL SCREENING EVENT
1.3 PLAN FOR DINNER TALK / WORKSHOP
1.4 WEEKLY COFFEE BREAKS
1.5 LAUNCH DINNER TALK / WORKSHOP CAMPAIGN

MAR WEEK 2: DINNER TALK PREP

2.1 CREATE DINNER TALK / WORKSHOP PRESENTATION
2.2 WEEKLY COFFEE BREAKS

MAR WEEK 3: PLANNING FOR APRIL’S LADIES NIGHT OUT

3.1 PLAN FOR APRIL’S LADIES NIGHT OUT
3.2 PRESENT AN EXTERNAL TALK
3.3 WEEKLY COFFEE BREAKS
3.4 HOLD A SPINAL SCREENING EVENT

MAR WEEK 4: LAUNCH DINNER TALK / WORKSHOP

4.1 PREPARATIONS FOR DINNER WORKSHOP
4.2 HOLD DINNER TALK / WORKSHOP
4.3 WEEKLY COFFEE BREAKS
4.4 HOLD SPINAL SCREENING EVENT
4.5 EXPERT BUNDLES FOR APRIL
MAY WEEK 1: PLANNING, PREP AND PROMO FOR MOTHER'S DAY THEMED LADIES NIGHT OUT (LNO)

1.1 UPDATE LIST OF BUSINESSES FOR EXTERNAL TALKS
1.2 HOLD A SPINAL SCREENING EVENT
1.3 PLAN FOR LADIES NIGHT OUT
1.4 WEEKLY COFFEE BREAKS
1.5 LAUNCH LADIES NIGHT OUT CAMPAIGN

MAY WEEK 2: LNO PLANNING & PROMOS

2.1 PREP FOR LADIES NIGHT OUT
2.2 WEEKLY COFFEE BREAKS

MAY WEEK 3: CONTINUE PROMOS FOR MOTHER'S DAY THEMED LADIES NIGHT OUT

2.3 HOLD A SPINAL SCREENING EVENT
2.4 PRESENT EXTERNAL TALK
3.1 EXTERNAL DINNER TALK TO PROMOTE LNO
3.2 WEEKLY COFFEE BREAK
3.3 HOLD A SPINAL SCREENING EVENT
3.4 TRACK MARKETING PROMOS / EVENT REGISTRATION

MAY WEEK 4: FINALIZE PREPARATIONS AND LAUNCH MOTHER'S DAY THEMED LADIES NIGHT OUT

4.1 FINALIZE PREPARATIONS FOR LADIES NIGHT
4.2 WEEKLY COFFEE BREAKS
4.3 PRESENT EXTERNAL TALK
4.4 HOLD A SPINAL SCREENING EVENT
4.5 EXPERT BUNDLES FOR JUNE
5.1 LAUNCH MOTHER'S THEMED NIGHT OUT
The Remarkable Practice Academy

July Marketing Map

- **Begin**
- **July Week 1**: Planning, Prep and Promo for 100 Day Challenge
  - 1.1 Update List of Businesses for External Talks
  - 1.2 Hold a Spinal Screening Event
  - 1.3 Plan for 100 Day Challenge
  - 1.4 Weekly Coffee Breaks
- **July Week 2**: Plan & Promo
  - 2.1 Prep for 100 Day Challenge
  - 2.2 Weekly Coffee Breaks
- **July Week 3**: Continue Promos for 100 Day Challenge
  - 3.1 Present an External Talk
  - 3.2 Weekly Coffee Break
  - 3.3 Hold a Spinal Screening Event
  - 3.4 Track Promos
- **July Week 4 / 5**: Finalize Preparations and Launch 100 Day Challenge
  - 4.1 Final Prep for Official 100 Day Challenge Launch
  - 4.2 Weekly Coffee Breaks
  - 4.3 Present External Talk
  - 4.4 Hold a Spinal Screening Event
  - 4.5 Expert Bundles for August

- **Summer Fun Theme**
- **Hawaiian Days**
- **Plan for 100 Day Challenge**
- **Landing Page**
- **Emails**
- **Fliers**
- **Social Media**
- **Direct Mail for Invitations**
- **Create Marketing Campaigns for Other Biz's to Promote Event**

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Created by Strategic Momentum Solutions for THE REMARKABLE PRACTICE
AUGUST WEEK 1: PLANNING, PREP AND PROMO FOR SUMMER FUN: HAWAIIAN DAYS

1.1 UPDATE LIST OF BUSINESSES FOR EXTERNAL TALKS
1.2 HOLD A SPINAL SCREENING EVENT
1.3 PLAN FOR SUMMER FUN
1.4 WEEKLY COFFEE BREAKS
1.5 LAUNCH HAWAIIAN CAMPAIGN

AUGUST WEEK 2: HAWAIIAN DAYS PLANNING PROMOS

2.1 PREP HAWAIIAN DAYS
2.2 WEEKLY COFFEE BREAKS
2.3 HOLD A SPINAL SCREENING EVENT
2.4 PRESENT EXTERNAL TALK
3.1 EXTERNAL TALK TO PROMOTE HAWAIIAN DAY
3.2 WEEKLY COFFEE BREAK
3.3 HOLD A SPINAL SCREENING EVENT
3.4 TRAC PROMOS HAWAIIAN DAYS

AUGUST WEEK 3: CONTINUE PROMOS FOR HAWAIIAN DAYS

4.1 FINAL PREP HAWAIIAN DAYS LAUNCH
4.2 WEEKLY COFFEE BREAKS
4.3 PRESENT EXTERNAL TALK
4.4 HOLD A SPINAL SCREENING EVENT
4.5 EXPERT BUNDLES FOR SEPTEMBER

AUGUST WEEK 4: FINALIZE PREPARATIONS AND LAUNCH HAWAIIAN DAYS

• Plan for Hawaiian Days

Landing Page
• mails
• Fliers
• Social Media
• Direct Mail for Invitations
• Create Marketing Campaigns for other Biz’s to promote event
• Inside-Out Philosophy

• DD Palmer’s First adjustment - Sept 18th

• Back to School event

Back to School event

Landing Page

• mails

• Fliers

• Social Media

• Direct Mail for Invitations

• Create Marketing Campaigns for other Biz’s to promote event

BEGIN

UPDATE LIST OF BUSINESSES FOR EXTERNAL TALKS

SEPT WEEK 1: PLANNING, PREP AND PROMO FOR CHIRO BIRTHDAY / BACK TO SCHOOL EVENTS

1.1 WEEKLY COFFEE BREAKS

1.2 HOLD A SPINAL SCREENING EVENT

1.3 PLAN CHIRO BIRTHDAY EVENT

1.4 WEAKLY COFFEE BREAK S

1.5 LAUNCH BIRTHDAY & BACK TO SCHOOL CAMPAIGN

2.1 PREP FOR CHIRO BIRTHDAY & BACK TO SCHOOL EVENTS

2.2 LAUNCH CHIRO BIRTHDAY & BACK TO SCHOOL CAMPAIGN

2.3 HOLD A SPINAL SCREENING EVENT

2.4 PRESENT AN EXTERNAL TALK

3.1 SEPT 1Th - HOLD CHIRO BDAY EVENT

3.2 WEEKLY COFFEE BREAK

3.3 HOLD A SPINAL SCREENING EVENT

3.4 TRACK PROMOS / BACK TO SCHOOL REGISTRATION S

4.1 LAUNCH BACK TO SCHOOL EVENT

4.2 WEEKLY COFFEE BREAKS

4.3 PRESENT AN EXTERNAL TALK

4.4 HOLD A SPINAL SCREENING EVENT

5.1 EXPERT BUNDLES FOR OCTOBER

SEPT WEEK 2: CHIRO BDAY & BACK TO SCHOOL PLANNING & PROMOS

SEPT WEEK 3: CONTINUE PROMOS FOR BACK TO SCHOOL EVENT

SEPTMBER WEEK 4 & : LAUNCH BACK TO SCHOOL EVENT
DECEMBER MARKETING MAP

**DECEMBER WEEK 1: PLANNING, PREP AND PROMO FOR CHRISTMAS / GIFT GIVING EVENT**

1.1. UPDATE LIST OF BUSINESSES FOR EXTERNAL TALKS
1.2. HOLD A SPINAL SCREENING EVENT
1.3. PREP CHRISTMAS / GIFT GIVING EVENT
1.4. WEEKLY COFFEE BREAKS
1.5. LAUNCH CHRISTMAS / GIFT GIVING CAMPAIGN

**DECEMBER WEEK 2: CHRISTMAS / GIFT GIVING EVENT PLANNING & PROMOS**

2.1. PREP CHRISTMAS / GIFT GIVING EVENT
2.2. WEEKLY COFFEE BREAKS

**DECEMBER WEEK 3: CONTINUE PROMOS FOR CHRISTMAS / GIFT GIVING EVENT**

2.3. HOLD A SPINAL SCREENING EVENT
2.4. PRESENT AN EXTERNAL TALK TO PROMOTE GIFT GIVING EVENT
3.1. EXTERNAL TALK TO PROMOTE GIFT GIVING EVENT
3.2. WEEKLY COFFEE BREAK
3.3. HOLD A SPINAL SCREENING EVENT
3.4. TRACK PROMOS / GIFT GIVING EVENT REGISTRATIONS

**DECEMBER WEEK 4 & 5: LAUNCH CHRISTMAS / GIFT GIVING EVENT**

4.1. LAUNCH CHRISTMAS / GIFT GIVING EVENT
4.2. WEEKLY COFFEE BREAKS
4.3. PRESENT EXTERNAL TALK
4.4. HOLD A SPINAL SCREENING EVENT
5.1. EXPERT BUNDLES FOR JANUARY

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New Year, New You

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Marketing To Your Muse  
(Module 99)

One of the secrets to modern marketing success is counter-intuitive. Instead of marketing to everyone, or even to a large group, successful businesses market to a specific person: their MUSE.

_Muse: a specific person who embodies most if not all of the qualities and attributes or your Ideal Customer or Client._

Your muse is not fictional; they are a real person. Who is your favorite patient? Who is the exact type of person you would love to attract? Get to know them better. Learn to speak directly to them. Learn to attract them.

**Identify Your Muse**

Who is your...
- Ideal Female Patient?
- Ideal Male Patient?
- Ideal Patient Family?

Once you've identified them by name, fill out the Defining Your Muse Questionnaire (pp 35-36), and create a profile for each Category Muse. Then determine what your Unique Selling Proposition (USP) is for your muse, using the USP Worksheet on page 37. Remember, be specific!

Once you've created your Muse Profile, you can speak directly to your Muse. You will be able to focus your market message, your services, and your practice.
Exercise: Defining Your Muse

1. You should identify a Muse for each “Category” of Practice Member you wish to serve:
   a. Who is your IDEAL FEMALE PATIENT?
   b. Who is your IDEAL MALE PATIENT?
   c. Who is your IDEAL FAMILY OF PATIENTS?

2. Complete the following exercise for EACH CATEGORY / MUSE
   a. State their NAME (Actual Person)
   b. Age?
   c. Status (single/married/divorced/widowed...etc)? (Describe relationship)
   d. Profession?
   e. Children? (Describe relationship w kids)

3. Profession
   a. Full Time? Part time?
   b. Self Employed? Corporate?
   c. Profit or Non-Profit?
   d. Where do they volunteer?

4. Income? Household income?

5. Education (Level)?

6. Interests
   a. Sports
   b. Fitness
   c. Recreation

7. What do they care about? What are they passionate about?

8. What causes do they support?

9. Describe their Living Arrangements / Home

10. Do they go to Church? Where?

11. Do they go to the Gym? Where?

12. Yoga? Crossfit? Other?

13. Where do they shop?
   a. For Food?
   b. For Clothes?
   c. For Family?

14. What do they buy?
   a. Describe their grocery cart contents
   b. Describe their Home Depot cart contents
   c. Describe their Staples cart contents
   d. What bags would they leave the mall with?
e. What is on their Christmas List?
f. What do they want for their birthday?

15. Do they shop on-line?
16. Where on-line do they shop?
17. What do they buy on-line?
18. What do they buy off-line?
19. Where do they go out to eat at lunch?
20. Where do they go out to eat for dinner?
21. Where do they go for coffee?
22. Where do they get their hair, nails, spa?
23. How do they spend their Free Time?
24. Who do they spend their time with?
25. Are their friends local, global or both?

26. What Circles of Influence to they have?
   a. Work
   b. School
   c. Church
   d. Clubs
   e. Teams
   f. Other Organizations

27. What books do they read?

28. What are they studying? (What Workshops/Seminars do they attend?)

29. Do they watch TV? What do they watch?

30. What do they do for entertainment?

**SELF-ASSESSMENT:**

On a scale of 1 to 10 (10 being optimal) – How would they rank themselves:

- Health
- Happiness
- Marriage
- Parenting
- Professional Life
- Financial
- Contribution
- Fulfillment
- Fun

*For more on your Muse, see DC Academy Module 99.*
USP: UNIQUE SELLING PROPOSITION

• What problem are you trying to solve for the customer?
(What problem do you think they have that you could solve with your offering(s)?)
• Do they think that they have this problem?
• Are they looking for a solution?
• Would they pay to solve this issue?
• Are they aware of you and your offering as a solution?
• Would they consider you as a solution?
• Would they pay you to solve this problem?

This is just a sampling of questions that you can use to build-out your own “Muse Profile”... Remember – this is not fictional – you are not fabricating an Avatar – you are describing a real person – your Ideal Practice Member – Your Muse.

Repeat this exercise for each category and corresponding Muse that you have identified.

Use this exercise to further your understanding of you Muse – their wants, hopes, dreams and aspirations – as well as their fears, problems and challenges. This knowledge will sharpen the focus of your marketing, education and services.

Return to this exercise regularly – and share it with your Team.

The more that you know about your Ideal Patient – the more Ideal Patients you will attract into your practice... Remarkable!
Talk Track  
(Module 93)

Your Talk Track is the Key Concept that matters most to you. What matters in your practice? What are you measuring? What are you messaging? That's your Talk Track.

Your "messaging" is at the core of all your marketing and promotions. You must be clear and compelling, and straightforward enough that your patients can repeat the message to others. Here's an exercise to establish your Talk Track.

1. How do you describe the Problem you solve? This is your "Anchor Concept."
   a. ex: Interference, stress, inflammation, fixation, etc.
   b. ex: Unwanted inflammation creates nerve irritation - which in turn causes sickness.
2. What is your key word or "Pivot Word"?
   a. ex: movement, stress, innate, flow, communication, inflammation
3. What do you measure?
   a. what kind of testing do you perform?
   b. ex: posture, bilateral weight, thermal, nervoscope, static palpation, motion palpation, x-ray
4. What is the Objective of your care?
   a. ie, improved communication, flow, expression of innate, reduce stress, increase movement, reduce inflammation
   b. ex: reduce unwanted inflammation
5. What other Lifestyle Recommendations do you make?
   a. ie, exercise, diet-style, sleep, stress mitigation
6. What do you enjoy talking about - what are you passionate about?
   a. ie, analogies, table talk, stories
7. What is the benefit to the patient? What's in it for them?
   a. ie, move better, optimal health, heal better
   b. ie, look good, feel great, function better
   c. ex: inflammation goes up - health goes down; inflammation goes down - health goes up.
Marketing Manifestation
(Module 97)

Keeping track of marketing can seem like juggling too many plates at once. Sheer brute force may produce some results, but at the expense of your Remarkable Life. The Marketing Manifestation Formula is a simple and powerful tool to help you keep organized. It helps you break down all complex ideas or initiatives into clear and follow-able action steps.

Your Marketing Manifestation is divided into 3 columns.

- **Column 1: Subject** - this is your idea or initiative or project or challenge
- **Column 2: Account** - or domain
- **Column 3: Category**

See the following pages for examples.
# Manifestation Formula: Practice

<table>
<thead>
<tr>
<th>Subject</th>
<th>Account</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Attraction/Promotion</strong></td>
<td></td>
<td>Web, Talks, Workshops, Referrals, Traditional Media, Screenings, Collateral</td>
</tr>
<tr>
<td><strong>Conversion</strong></td>
<td></td>
<td>Clinical, Education (In-House), Promotion, Financial, Team, Purpose/Intention, Vision</td>
</tr>
<tr>
<td><strong>Patient Education</strong></td>
<td></td>
<td>Practice Brand, Pre-Consult, Consult and Exam Reports, Micro-Education/Table Talk, Workshops, Collaterals</td>
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<tr>
<td><strong>Practice</strong></td>
<td><strong>Clinical</strong></td>
<td>Paperwork, Consultation, Exam, Recommendations, Adjusting Protocols, Supportive Protocols, Re-Exams</td>
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<tr>
<td><strong>Team</strong></td>
<td></td>
<td>Check-In CA (&quot;Boss of Today&quot;), Check-Out CA (&quot;Boss of Tomorrow&quot;), Tech CA, Exam DC (Tech CA...Plus), Back Office (Manager), Adjusting DC1 (Exam DC...Plus), Adjusting DC 2 (Adj. DC 1...Plus)</td>
</tr>
<tr>
<td><strong>Financial</strong></td>
<td></td>
<td>Protocols/Recommendations, Payment Plans, Prices-Services, Special Arrangements, Insurance/Cash/Cash-Like (Culture), Technology (EFT/Software/Credit Cards), Financial Policies</td>
</tr>
<tr>
<td><strong>Retention</strong></td>
<td></td>
<td>Clinical, Education (In-House), Promotion, Financial, Team, Purpose/Intention, Vision</td>
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</tbody>
</table>

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## Manifestation Formula: Promotion

<table>
<thead>
<tr>
<th>Account</th>
<th>Categories</th>
<th>Action Steps</th>
</tr>
</thead>
</table>
| **Web**  |            | Website
         | Blog
         | Facebook Fanpage
         | Twitter
         | Banner Ads
         | Bonfirehealth.com
         | SEO
| **Talks** |            | Focus (ex. Schools)
           | Create Opportunity (Patients)
           | Contact Person (Warm Leads)
           | Send Introduction Letter
           | Email Follow-up
           | Meeting/Materials
           | Schedule
| **Workshops** |            | Schedule (quarterly/yearly) Topics
                 | Outline (Content)
                 | PowerPoint
                 | Promo Inside Office
                 | Promo Outside Office
                 | CTA – Schedule NPs
                 | Technology (Productions)
| **Promotion** | **Referrals** | Pre-consult Script
                   | Workshop
                   | Referral Coupon
                   | Special Promotions (PADs, Holiday, Buddy Wk)
                   | Body Signal Business Cards
                   | Ask at 1st PE/PR; R4; R5
                   | TIC – Table Talk
| **Tradional Media** |            | Collaterals
                   | Web (Site, SEO, Facebook, Blog)
                   | Newspaper (ROP)
                   | Newspaper (Inserts)
                   | Magazines
                   | Cable
                   | Radio
| **Screenings** |            | Script
                   | System (Tech)
                   | Training
                   | Team
                   | Anchor Campaigns
                   | Special Events
                   | Chip Shots
| **Collateral** |            | Business Cards
                   | Report Brochures (R1)
                   | Business Brochure
                   | Topic Brochure
                   | Website
                   | Books (Gifts, Lending Library)
                   | DVD Lending Library
Marketing ROI Report
(Module 98)

As you dive into Marketing, it is important to keep track of your Return On Investment. This will help you know exactly where those resources need to be spent.

You have 4 Limited Resources. These are:
- Time
- Energy
- Focus
- Money

Where these are invested is critically important.

The following report is a tool to help you break down individual investments to help you see what your ROI was for each.

*For more details, see the DC Academy!*
RETURN ON INVESTMENT REPORT

Month:______________________________

<table>
<thead>
<tr>
<th>Event</th>
<th>Time (0 - 3)</th>
<th>Energy (0 - 3)</th>
<th>Focus (0 - 3)</th>
<th>Money (0 - 3)</th>
<th>NP Leads (Scheduled)</th>
<th>NP Prospects (Exams)</th>
<th>NP Conversions</th>
<th>Grade (A - F)</th>
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INTERNAL MARKETING
Generating Internal Referrals  
(Module 68, 69)

**Organic Referrals**  
When patients are happy with their care, they naturally refer others to the practice.

**Process-Driven Referrals**  
At set points in the patient process, provide opportunities for patients to refer friends and family. From Day 0, use scripting and processes to bring this to the patients' consciousness. This is every team member's top priority.

**Day 0:**

- **Outside Talks:** Offer a special discount or rate for multiple family members. Always mention friends and family during your CTA.
- **Spinal Screenings:** Actively look for other family members or friends accompanying the person you're screening, and get them involved! Again, offer family discounts.
- **NP Phone Call:** Always ask "Is this appointment for you or for your entire family?"
- **NP Intake Forms:** Include questions about family, children, pregnancies, etc.

**Day 1:**

- **NP Tour:** Be sure to introduce the concept of children and whole families being checked. When reviewing the success story, be sure to mention referrals.
- **Meet & Greet:** If a patient is referred, be sure to recognize the referring party by name.
- **Pre-Consult:** Include a statement around children and early check-ups, and engage the person by asking "Does this make sense?"
- **ROF:** Encourage their spouse to attend their Report of Findings. Getting the spouse involved is a critical part of the Day 1/2 process!
- **NP Check Out:** Give the patient a Referral Coupon.
Process-Driven Referrals, continued

Day 2:

ROF: Mention Family Check-Ups once the patient sees and acknowledges their own problem.

Family Check-Up Policy: Create a policy that you extend a NP Consultation and Exam to all family members at no charge within 2 weeks of the first family member’s ROF.

Financial Plans: Keep families in mind when you create your financial plans. Focus on creating value over creating bargains. (See Mod 25 for more details.)

Day 3+:

Table Talk: This is your opportunity to educate your patients, and provides a natural segue into asking who they know. Share testimonials, ask them questions, be specific in equipping them to share chiropractic's story. (For more on the twelve major concepts all your patients should know, The Dirty Dozen, see Module 50.)

Workshop: The workshop is key to helping your patients understand chiropractic, to have their own epiphany. You should focus on four main elements:

1. The Wellness Paradigm
2. The Chiropractic Principle
3. How to Be a Successful Patient
4. The Mission

These elements should all tie into a Key Concept that you want the attendees to take away. (Example: "Why should children have their spine and nervous system checked by a chiropractor throughout life?")

Progress Report: Use this time to specifically ask if the patient has had their family checked yet.
Referrals (Tactics – System – Automatic)

Three Categories of Referral:

1. Organic
2. Process Driven
3. Internal Promotions Driven

CHECK LIST:

- Family Check-Ups at Screening / Talk
- Friend Parlay at Event
- Family Rate in Advertisement
- First Phone Call – “Whole Family?”
- Tour
  - Kids Corner
  - Success Story
  - Family Photos
  - Adjustment / Wellness Club
- Family Check-Up Offer / Policy
- Spouse at Report
- Expectation Thread Video #2
- NP Orientation / Workshop / Better Results Faster WS
  - Guest at WS
  - Referral of Friend or Loved One to Check-Up Appt
  - Dinner Talk Referral
- Advanced Spinal Care Class – Same as Above
- Testimonials – Written and Video / Book / Web
- Power Point Slides (D Teck)
- Gifting (Thanks for the Referral)
- Referral Coupons / Gift Cards
- Sharing on Social and Blog / RSS feed / forward
- Progress Exam Questionnaires
- Hot Seat Intros - Tribe
- POW / FOM / CKOM (Patient of Week / Family of Mo / Chiro Kid)
- TY Card w Copy of Testimonial to the Referring Source /Patient

For more on generating Internal Referrals, see DC Academy Modules 68 - 69.
Getting Testimonials  
(Module 83)

Humans innately respond to stories. Story-telling developed primarily as survival, not entertainment, but as the primary way to pass on knowledge and experiences. We gain confidence and find validation in hearing about others like us share their experience. Sharing the right testimonial, at the right time, can provide that extra bit of certainty and confidence to get patients to start and stay under care.

Build getting testimonials into your system. From Day 1, introduce the concept. Include testimonials in your tour, in take home materials. Make sure to post them on social media, and your blog. Include them in Table Talk, and in your slide show. Make sure they are visible to your patients. Plan certain point in a patients' care, such as progress exams and reports, when you always ask for their testimonial. Automaticity is your friend!

When you ask for a testimonial, make the request personal! Tell the patient "I need your help." Tell them there's someone just like them, who needs to hear their story. When they write, say "write as if you were talking to you." And get it that day! Don't ask for it next time.

Once you get the testimonial, use it! Collect them into a book, and keep the book in your waiting area. Hand out a Testimonial of the Week. Put it online: your blog, social media, your website, ads. Include one on your slideshow. Always have a success story up. Read them before a workshop!

There are stories waiting to be told that will inspire and motivate people - ask for them!
In your own words, please explain your reason for seeking chiropractic care, and any initial complaints. What advice would you give to a friend, coworker, or loved one who was considering taking a step toward better health through chiropractic? And finally, how has chiropractic made a difference in your life?

__________________________________________________________________

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Thank you for sharing!
You have been selected as one of our outstanding patients whom we would like to give the opportunity of sharing your Chiropractic success with others.

Please answer the following:

1. What was your life like before you came into our office?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

2. How did you find our office?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

3. What has life been like since you came into our office?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

4. What would you like to tell someone who is considering chiropractic?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
TESTIMONIAL THANK YOU CARD

(Send these to the person who refers the patient who writes a testimonial. Include a copy of the testimonial, and expect another referral soon!)

Hello Name

I thought that you would enjoy reading this testimonial.

We appreciate the opportunity to make this kind of difference in someone’s life through our work at Franson Family Chiropractic.

“Our Mission is to Educate and Adjust as many Families as possible toward Optimal Health through Natural Chiropractic Care.”

Thank you for helping us serve our Mission! If you were not so kind as to send this person to us we would not have been able to help them.

We appreciate your trust and advocacy!

Let us know if there is anyone else that we could help.

Thanks, again!

The Team at Franson Family Chiropractic
Suite 101D
Cummings Center
Beverly, MA 01915

978.927.8466

www.fransonchiropractic.com

(INCLUDE COPY OF TESTIMONIAL)

For more on Testimonials, see DC Academy Module 83.
Patient Gifting  
(Module 84)

Gifting is possibly the easiest, most fun, and most effective marketing strategy there is. People love to receive gifts, especially unexpected ones. They feel energized, and are more likely to return the act of kindness. Everyone wins!

Again, build this into your system! Here are some ideas for when and what to gift:

- Marketing Events
  - Inside Event: Raffle Prizes
  - Outside Event: Drawings
- Day 1 Check Out (Water Bottle)
- Welcome Kit (T-Shirt)
- First Progress Exam (Token, Gift Card)
- Re-Exam/ Re-Sign (Book)
- Testimonial (Gift Card)
- Referral (Thank You Card, Gift Card)
- Success Story (Pro Shop, Gift Card)
- Patient/Kid/Family of the Month and Year (Custom Gift/ Plaque)

Make your gift personal, relevant, and immediate. Pick a team member to own this, to be the Gifting Czar, to be the Ambassador of Love in your practice.

Remember: Make sure that everything lives in a SYSTEM – a mechanism that protects the action step – make sure it happens, every time!
Buddy Week  
(Module 91)

Buddy Week is the week all your patients are asked to bring someone they know to observe their adjustment. This is a week of organized observation days:

*Every Buddy knows some Buddy, and any Buddy is welcome!*

To begin your plans, pick a theme, then a date. Design a contest, with prizes. You can even plan an in-office party, with music and food. And promote everywhere!

When a patient brings a Buddy, explain what you're doing. Go over the patient's findings, and talk the Buddy through the adjustment. Be ready to do a BSE for the Buddy, and get them scheduled for their New Patient appointment.

Think of Buddy Week as a week-long internal spinal screening event.

Mom's Tribe  
(Module 92)

Mom's Tribe is founded on the premise that what is good for the people is good for the practice. Mom's Tribe is for moms of all ages and stages - even not-yet moms! Its purpose is:

- To Provide a Supportive Environment for Mothers
- To Create a Platform for Sharing and Discussions
- To Discover Information and Best Practices
- Peer Modeling and Sharing Wisdom

A Mom's Tribe gathering starts with social time, moves into discussion of a topic, which is followed by a time for sharing experiences and asking questions. All of this builds community. Mom's Tribe can be led by one of your DCs, by your spouse, by a CA or other team member, or by a special practice member.

And again, promote everywhere! In addition, contact local mom's groups, and put flyers in local coffee shops or other hot spots. Make it clear that ALL moms are invited, whether or not they are a patient in your practice.
Sweetheart Luncheon  
(Module 94)

The Sweetheart Luncheon is designed to recognize and multiply your favorite patients. It is an intimate, lunch gathering that provides the perfect setting to appreciate these wonderful patients. You will hear their stories, learn why they love your practice, and have a chance to invite new people in to your tribe.

Who To Invite:
- Patients of the Week - plus their guests
- Families of the Month - plus their guests
- Stand-Out Success Stories - plus their guests
- "Ambassadors" - and their guests

Where To Host:
- A Local Restaurant
- Beautiful Setting
- Quick Service - Reliable
- Start a Relationship

How to Execute:
- Recognize your Guests as Ideal Patients
- Explain your "Muse"
- Encourage/Prompt sharing stories and testimonials
- Ask Provocative Questions
  - Why do you love our practice?
  - What do you love about our team?
  - What makes us different?
  - What does your chiropractic care mean to you?
  - What do you tell others about us?
- Listen to Responses!
- Promote Future Events - Inquire About their Interests
- Celebrate and Recognize their Commitment to Health
- Recruit and Deputize Them
Inside Talks/Better Results Faster
(Module 52-53, 74)

Inside Talks are one of the most effective ways to build your practice and your impact in your community. As you practice, visualize your ideal patient, and their family, friends, and co-workers. Keep your Muse in mind!

For all workshops, follow this general outline:
1. The Opening
   a. Welcome
   b. Introductions
   c. Pre-Frame (Set Expectations - State your Premise)
   d. Compelling Story (Make Connection)
2. The Body
3. The Close with CTA

The Body of your workshop is the time for you to move your audience from Curious to Empowered and from Empowered to Engaged. You are helping them to understand your message, not just hear it.

Here is a more specific outline for the #Better Results Faster Inside Talk.

1. Introduction: Patient Testimonial.
2. Opening: make it funny, and ask for their engagement.
3. Personal Story.
4. Lead with Questions.
5. Body of the Message. 10 Questions That You Must Ask if You Want to Be Healthy (see following pages for a handout!)
   a. Are You Designed to be Healthy or Sick?
   b. Is Your Body Smart or Stupid?
   c. What is the Most Important System for Staying Healthy?
   d. What Protects Your Nervous System?
   e. Is Your Life Stressful?
   f. What is All of this Stress Doing to Your Body?
   g. What is the Real Cause of Health Problems?
   h. How is Your Nervous System Functioning?
   i. What Should You Do if You Have Subluxation?
   j. When is the Best Time to Take Action with Your Health?
6. The Offer.

More detailed notes, as well as several sample PPT decks, are available as part of the DC Academy!

For more on Remarkable Workshops, see DC Academy Modules 52 - 53 & 74.
10 QUESTIONS THAT YOU MUST ASK IF YOU WANT TO BE HEALTHY:

1. ARE YOU DESIGNED TO BE SICK OR BE HEALTHY?
   - SICK
   - HEALTHY

2. IS YOUR BODY SMART OR STUPID?
   - SMART
   - STUPID

3. WHAT SYSTEM IS MOST CRITICAL FOR OPTIMAL HEALTH?
   - DIGESTIVE SYSTEM
   - MUSCULOSKELETAL SYSTEM
   - NERVOUS SYSTEM

4. WHAT PROTECTS YOUR NERVOUS SYSTEM?
   - SKULL AND SPINE
   - BIKE HELMET
   - AIR BAGS

5. IS YOUR LIFE STRESSFUL?
   - YES
   - YES

6. WHAT IS ALL OF THIS STRESS DOING TO YOUR BODY?
   - ________________________________

7. WHAT IS THE UNDERLYING CAUSE OF MOST HEALTH PROBLEMS?
   - BAD GENES
   - BAD GERMS
   - BAD LUCK
8. HOW IS YOUR NERVOUS SYSTEM FUNCTIONING?
   - I HAVE NO IDEA
   - HOW WOULD I KNOW?
   - I AM CURIOUS

9. WHAT SHOULD YOU DO TO CORRECT PROBLEMS WITH YOUR NERVOUS SYSTEM?
   - IGNORE IT
   - DRUG IT
   - CORRECT IT

10. WHAT IS THE BEST TIME TO DEAL WITH YOUR HEALTH ISSUES?
    - NOW

ARE YOU INTERESTED IN A CONSULTATION? (Y / N) (INDIVIDUAL / FAMILY)

For more on the Better Results Faster Orientation, see DC Academy Module 74.
Body Signals Workshops  
(Module 86, 100-103)

Body Signals are symptoms or conditions. The Body Signals Workshop Series, is a highly effective, subluxation-based, condition specific, patient education system that will flood your workshops with leads and your office with Prospective New Patients. These workshops are a way to connect and resonate with people who are actively seeking a solution.

How to Run a Successful Campaign

Start by announcing and explaining the program. Survey your practice members to discover what symptoms they are most interested in. People are most likely to attend when you choose topics they care about!

Once you’ve chosen your Body Signals, create a calendar of the monthly themes

Then, prepare your content and assets. (See Module 103 for how to write compelling content!)

Promote, promote, promote! Utilize flyers, handouts, social media & blogs, postcards, table talk, email blasts, articles, and traditional media. Be sure to talk to individuals, too, both in and out of the practice.

Create a system that works, so that your marketing automatically flows from month to month.

The Workshop Itself

Create structure, and be consistent from month to month.
- For your Introduction, utilize testimonials.
- Describe the Body Signal = Topic of the Month/condition/symptom = the Problem
- Describe specific Patient Presentations
- Review the Allopathic Approach and Results (outcomes/ failures/ side-effects/dangers)
- Explain the Chiropractic Approach.
- Call to Action.
- Close with an Offer to the Guests.

For more on For sample promotional materials, including post-cards and fliers, as well as suggested Body Signal topics, and sample PPT decks for the talks, see DC Academy Module 86.
Wellness Lifestyle Program  
(Module 79)

Behaviors predict outcomes. As a Wellness Oriented health care provider, you are going to have to help patients change their behaviors. You have to teach them to transform their lifestyle. There are several ways you can influence your patients: Information to Transformation, Health Talk Series, Wellness Lifestyle Education, Community Engagement, and Web Resources.

Your objectives are

• Information that empowers, inspires, and equips.
• Environment that promotes and rewards healthier choices.
• Resources that make it easier to make healthy choices.
• Community that supports a healthier lifestyle.
• Specific Health Interests such as weight loss and stress reduction.

Logistics:

• Health Talk Series (4 Talks)
  1. Bonfire Foundational Workshop, Program Orientation, Launch
  2. Bonfire FUEL (how you eat)
  3. Bonfire AIR (how you move)
  4. Bonfire SPARK (how you think)
• 90 Day Challenge (Quarterly)
• Buddy System
• Web-Based Program (www.bonfirehealth.com)
• Clinical Assessments
• Bonfire Journal
• BF Periodic Table of Essential Elements
Reactivation Campaign  
(Module 82)

Reactivation Campaigns serve to make sure previous patients know you are still thinking about them and still care for them. These campaigns put them at ease, welcome them back, and make it simple for them to return.

There are three primary types of Reactivation Campaigns:

- Birthday Reactivation Cards
- Full Scale Reactivation Campaigns
- Event-Centric Campaigns

Birthday Cards

These are the cornerstone of your Reactivations. Every month, send a Birthday Card to all your former patients with birthdays that month. Include a Reactivation Message on the card, with a special offer and a specific Call to Action. This promotion is running constantly, throughout the year.

Full Scale Reactivation Campaign

This is an email driven Reactivation Campaign. Segment your list into Active Patients, Previously Active Patients, and Leads (people who never became patients).

Create a VLOG or blog post that speaks to your value and uniqueness, and post on your blog and any other social media you have. Email the actives and leads to announce the VLOG - include a link to your blog or VLOG post.

For the previously active list, send an email sequence. After the first email, take care of any responses, then send the second email to all who didn't respond. Continue this pattern until you get a response or exhaust the sequence.

Make sure you train your team ahead of time on how to handle Reactivations. Train on scripting and procedures, and make sure you have room in your schedule! Start each Reactivation with a Consultation - don't assume you know what they want. If they want to re-start their care, do another Examination, and take them through all the Expectations and Agreements again. Re-visit the 4 Agreements - see DC Module 17!
Reactivation Birthday Message: Sample

Hi Nina,

HAPPY BIRTHDAY!

Do you remember that we used to tell you that you actually get to subtract a year on your birthday each year that you are receiving regular chiropractic care?

I would love to be able to say that to you again!

In honor of your birthday, we’d want to offer you the chance to come and visit us during this month at no charge. Please accept our offer of a complete consultation and examination done at no cost to you.

This exam is comprehensive including any x rays you may need – regularly a $285 value. Let’s revisit your health and find out where you stand. We can set some new goals and put together an action plan.

You know that your life is better when you are healthy. Let’s get started.

I’m looking forward to seeing you soon. Give us a call today: (978) 927 8466.

Happy Birthday! Many happy and healthy returns!

In Health from Within,

Doc

Dr. Stephen Franson

For more on Reactivation Campaigns, see DC Academy Module 82.
REACTIVATION EMAIL: SAMPLE 2 EMAIL SEQUENCE

(WITH VLOG – VIDEO BLOG)

1. POST VLOGs TO BLOG (series)
2. BLAST LINK TO 2 LISTS
   a. ACTIVE PTS
   b. LEADS
3. THEN SEND (FORWARD) PREVIOUSLY ACTIVE PTS SERIES OF 3 DRIP EMAILS
4. POTENTIAL OUTCOMES:
   a. THEY SCHEDULE TO COME IN FOR CONSULTATION
   b. THEY OPT-OUT OF EMAIL LIST
   c. REQUEST THAT YOU DISCONTINUE CONTACT
   d. CRICKETS (NO RESPONSE)

EMAIL #1: SUBJECT: DID YOU SEE THIS?

Hello Nina

I am not sure if you’ve been following our blog – but this post is right up your alley. Check it out!

http://www.youtube.com/watch?v=3bLNgAa6Fl4

BTW, these things work w spouses and co-workers, too!
Let me know what you think.
Hope to see you soon. We miss you!

In health from within,
Doc
EMAIL #2 (2 DAYS LATER): SUBJECT: DID YOU GET THIS?

Hello Nina

I hope that you enjoyed that video. If you missed it; I put a link at the bottom of this note for you.

I know that it’s been a while since you’ve been in our office. People drift away from care for any number of reasons – we change jobs, have kids, move – or just generally get too busy for even the most important things.

We just wanted you to know that we were thinking about you and would love to have you back; and we want to make it easy for you.

To start, we’ll need to catch up with you and find out where you are in your health. We would like to extend to you a consultation and any examination (including x rays if necessary) at our expense – no charge to you.

We can follow that up with a discussion of your findings; we can then set some goals and create a game plan for you.

Life is better when you are healthier. Let’s get you going in that direction again.
I look forward to seeing you soon.

In health from within,

Doc

PS: Enjoy this post “Never Let Your Kids Leave for School without These 5 Things”

http://www.fransonchiropractic.com/blog/2013/08/29/never-let-your-kids-leave-for-school-without-these-5-things/

It’s right up your alley – BTW, these things work w spouses and co-workers, too!

*** If you are feeling especially ambitious...

Add: “I know that you are busy so I have asked Sarah to follow-up with you next week. If we don’t hear back from you, watch for a call from Sarah. Looking forward to reconnecting.”
EXTERNAL MARKETING
Sales Force: New Business Development Expert (Module 75)

The next level in Chiropractic Marketing is a real sales force - a sales professional or team of professionals dedicated to finding New Patients Prospects.

Your New Business Development Expert, or Biz Dev, is your community outreach director and coordinator. Their job is to network, build relationships, generate opportunities, and execute events. This person is outgoing, driven, high-energy, and experienced in sales.

Other members of your External Sales Force can include a Community Outreach Director, contracted outside experts, and a Spinal Screening/Corporate Wellness Captain.

For all of these team members, train them, and provide scripting for their interactions with the community.
Biz Dev Outside Talks Phone Script: Sample

Hello, my name is “name” and I’m the Community Outreach Director for “name of organization”. I’m calling on behalf of local wellness expert, Dr. “name”. How are you doing today? (Respond appropriately)

Can you put me in touch with the person in your office that would be able to help me with a complimentary community initiative that promotes health and wellness education?
(Manager, HR Dept., Benefits coordinator) (Get name of contact before being transferred)

The reason for my call today is Dr. “name” asked me to reach out to you to promote a COMPLIMENTARY Health and Wellness workshop for local businesses / organizations.

Dr. “name” will be providing free Health and Wellness Talks to select companies / groups like yours to promote better health in our community.

Our doctors donate their time every month to local businesses, schools, and other organizations to raise awareness on preventative health care. Our goal is to reach as many people in our community as possible to help improve their lives – one organization at a time.

Dr. “name’s” presentations are fantastic! They range in time from 20 to 45 minutes and can be presented as a Lunch and Learn. The doctor will provide everyone present with a free healthy lunch!

Our most popular presentations cover topics like: Stress Reduction, Ending Back Pain, Boosting Your Immune System, Workplace Ergonomics and Increasing Your Energy by 300%, among others, depending on the needs and interests of your group.

Which presentation would work best for your organization?

(You may also make reference to other talks already completed in the community.)
Networking/Coffee Break  
(Module 85)

For all the value that internet marketing provides, nothing beats old-school, social interactions for their networking value. Classic networking includes any and all activities that create connections and relationships with real people. These can be large, formal events, but they can also be small, and relaxed.

One of the best, simplest strategies is the **Coffee Break**.

And it is exactly what is sounds like: a Coffee Break with someone you want to get to know. Look for influencers in your community. Interact with them. Tell them you admire them. And invite them to join you for coffee.

- Coffee is low-commitment, and an easy interaction.
- Brief & Powerful
- Interview the Influencer  
  - Vision  
  - Purpose  
  - Inspiration  
  - Experience  
  - Future  
  - How can I help?

Here’s what you’re trying to accomplish:
- Connection  
- Build Trust  
- Get their Story - Go Deep  
- Recognize and Compliment  
- Create the Space for them to ask you: **What’s YOUR Story?**  
  - Share your Vision, Mission, Purpose and Premise  
  - Concise & Compelling Pitch  
  - Tell YOUR STORY  
  - "Did you know that?"  
  - "How do I get that story to your people?"

Once you engage and connect with them, they will want you to engage and connect with the rest of their network!
Outside Talks

(Modules 70-73)

Generating Outside Talks:

The opportunity to speak and share your story is the single most powerful tool for generating New Patients. And the biggest challenge is simply how to find and land speaking engagements.

There are three sources of outside speaking opportunities:

1. **Internal Generation through your Patient Base**:
   Connecting through your practice members to businesses, churches, organizations, schools, etc.

2. **Internal Business Development**:
   Dedicating a team member to the task of generating speaking opportunities for you in the community. They are your networker.

3. **Outsourcing Business Development**:
   Contracting with a company to find speaking engagements on your behalf.

Internal Generation Through Your Patient Base

Your patients will fall into three different categories: Hot Leads, Warm Leads, and Cold Leads.

From Hot Leads

A "Hot Lead" is a person who is a decision maker. This would be an owner of a company, or an HR director, a boss, a coach, a pastor, a director, etc. They can decide if you gain access.

Talk to the Hot Lead: give them a concise description of what you are offering. Remember to keep it benefit oriented. Let them know you will provide all necessary marketing materials. Once they are on board, assign a Team Member to collect their contact information.

That Team Member needs to reach out immediately to secure the date and details.

Now you have an Outside Talk!
Outside Talks, continued:

From Warm Leads

A "Warm Lead" is a person who can introduce you to the decision maker.

There's an extra step here, because you need to meet the decision maker! So talk to your lead first: ask for their help! Tell them what you are offering, and explain how they can follow-up.

Once the Warm Lead has connected you to their decision maker, tell them about yourself. This will often be a phone conversation. Tell them...

- Who? - Who are you?
- What? - What is this call about?
- Why? - Why are you doing this? Why should they be interested?
- How? - How do you deliver value?

Remember to keep it benefit oriented. Listen to their feedback. If you can, schedule the event right then and there. Otherwise, schedule a meeting with them, to close the deal.

Now you have an Outside Talk: make it count!

For more on Outside Talks, see DC Academy Modules 70 - 73.
Outside Talk Checklist

Confirm the event is booked if it was booked by an outside source:

1. Location.............................................................................................................................................
2. Contact Person......................................................................................................................................
3. Contact Info.......................................................................................................................................... 
4. Topic of talk/event ............................................................................................................................... 
5. Date of event ......................................................................................................................................... 
6. Number of prospective attendees ...................................................................................................... 
7. Lunch? ..................................................................................................................................................
8. Issues with Offer of CTA? ....................................................................................................................

Research background info on company: what do they do, what is their product/service, size of company.

1st Confirmation Call (to be done as soon as the talk is booked): reach out to contact person to confirm logistics of event.

- Confirm date and time
- If during lunch time, what time do employees have to be back to work? What is your hard stop?
- Confirm topic
- Why was that specific topic chosen?
- Let the contact person know that you will using PPT presentation with a projector.
- Do they have a projector, screen, access to power, and/or an area that facilitates a projector setup?
- Get a feel for the demographics of the group; age, life stage, blue collar/white collar, industrial/corporate setting, are they in sales, are they in service, are they management.
- What are the companies concerns or challenges (What problem(s) are you solving?)
- What are the employees concerns or challenges (What problem(s) are you solving?)
- Let the contact person know that you will be sending him/her an order form for lunch which should be filled out and returned no later than 48 hrs prior to the event (if the event is on a Monday they should have it in by the previous Friday).
- Will the room being used for the event be available 30 minutes prior for setup?
- Let the contact person know you will call the day prior to the event for final confirmation call.
Send an email to the contact person with lunch order form that includes the title of the event, the date and time of the event, and the name of the speaker. The email should also include a reminder of deadline for being returned. (This should be done immediately after the conclusion of the 1st confirmation call).

Once you receive the lunch order form, place the order to the food vendor. Be sure there is at least a 2 hour gap between the lunch pickup time and the start of the event. If the event begins at 12:00pm make sure to tell the vendor to have the food ready by 10:00am.

2nd Confirmation call (to be done 24 hrs prior to event):
- Confirm date and time.
- Where should you go when you arrive?
- Who should you ask for when you arrive?
- Confirm final head count.

Night prior to event:
- Final run through PPT deck
- Study / Practice your Opening and Close / Offer / CTA
- Email a copy of your PPT to yourself and host (back-up)
- Save another copy on the laptop you are using

Day of the event
- Equipment check: make sure you have everything you need including new patient schedule, intake forms, business cards, pens, model spine, and any tech you need like laptop, projector, screen, and flash drive that has the talk on it.
  - *this may sound like overkill but the last thing you want to do is show up unprepared and unable to execute
- Pick up lunch
- Show up 30 min prior to event start to setup (bring assistant)
- Circulate the room and network with attendees
- Distribute Collaterals (ex: Stress Survey)
- Prepare your Introduction (meet with and train the person introducing you)
- Get in State – and focus on your Purpose and Goals
- Relax and Have Fun!
- Kick Butt and Deliver Value
- Schedule Appointments!

For more on Outside Talks, see DC Academy Modules 70 - 73.
Dinner Talks  
(Module 87)

Dinner Talks are a unique approach to Outside Talks. Around the dinner table is one of the most powerful moments of community, and the potential here is huge. The primary difference between Dinner Talks and other Outside Talks is that here, YOU have to get people to come.

In order to do that, start with inviting Ambassadors - those patients who are awesome and who regularly refer people in - and have them bring guests. Invite Patients of the Week and Families of the Month from the past few months. When networking, always be ready to invite your contact to a Dinner Talk. I like to combine this with the New Patient Orientation. At the New Patient Orientation, invite the attendees to bring someone who needs to hear the chiropractic message to a Dinner Talk. (See DC Academy Module 87 for scripting of close/CTA.)

At the Dinner Talk itself, have Team Members present to help schedule. Place Raving Fans at each table. Circulate and Meet and Greet the guests - do not sit and eat! You are there to meet new patients! Encourage the Raving Fans to share their story with their table-mates. Do NOT do consultations. Do NOT pass out business cards. Keep in mind that these people need your help, and build a case to schedule New Patient Consultations during your talk.

The talk itself is basically the same as the New Patient Orientation talk track. The Dinner Talk is simply a way to spread the message more widely!
# Patient Appreciation Dinner Workshop Checklist

<table>
<thead>
<tr>
<th>TIMELINE BEFORE EVENT</th>
<th>TO DOs</th>
<th>SPECIAL INSTRUCTIONS</th>
<th>✓ DONE</th>
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</thead>
<tbody>
<tr>
<td>2 months</td>
<td>Pick date and location</td>
<td>✓</td>
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<tr>
<td></td>
<td>Budget for restaurant costs, advertising, staff</td>
<td>✓</td>
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<tr>
<td></td>
<td>Negotiate a plated dinner</td>
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<td>Create Email blasts</td>
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<td>Registration Landing Page</td>
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<td>7 weeks</td>
<td>Invitation list</td>
<td>Entire practice for 1st talk then past 4 mo. NPs</td>
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<td>Create Invitations</td>
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<td>4 weeks</td>
<td>Hand deliver invitations</td>
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<td>Track who has received invitations</td>
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<td></td>
<td>Create print ad and social media posts/events</td>
<td>Leverage technology - Synduit</td>
<td></td>
</tr>
<tr>
<td>2 weeks</td>
<td>Call to confirm RSVPs</td>
<td>2 Fridays before event</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mail Invites if haven’t hand delivered yet</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Personally invite 2 patients for testimonials</td>
<td>3 emails, 5 days apart</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email blasts</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>1 week</td>
<td>Call YES’s to confirm guests</td>
<td>Monday before event</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Gather materials for event</td>
<td>Schedules, balloons, raffle, name tags etc.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Prepare presentation</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Schedule Flow with Restaurant</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Event</td>
<td>Welcome Guests</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Circulate through the room</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tell the message with a call to action</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Schedule new patients</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
Well @ Work
(Module 77)

These days, our work-places shape our lifestyle. This makes it critical for you to reach people where they work.

The well@work program is a simple and cost-effective way to get into a company and leverage the new relationship into multiple Outside Marketing Opportunities. The premise is straightforward: you bring your Team and a group of like-minded wellness partners into a business to do a small-scale, high-impact, mini wellness-fair at no cost to the hosting business.

Choosing your partners here is important. Pick people and groups who are like-minded, who are industrious and reliable, who have a strong brand, and a robust list. Some examples for offerings: spine & nerve system evaluations, smoothie bar, CrossFit/other Gym, yoga studio, massage, etc.

Make sure you structure the agreements between you and your partners, and you and your hosts. Agree on participation - get a commitment from the partners! Make sure everyone is cross-promoting. And be clear that you will be sharing expenses.

Once you've generated a hosting business, ensure there is one primary contact. Coordinate the best location with them. Discuss site preparation. Send them appropriate promotion materials. And make sure you follow up afterwards!
EXAMPLE PROMOTIONAL EMAIL

well@work

Micro-Wellness Fairs

SUBJECT: Free Massages and Smoothies Today!

Yep – You read that right...Free Chair Massage and Smoothie Bar today in the Cafeteria from 11:00 am – 1:00 pm at Enzymatics.

As a member of the Enzymatics Family – we want to appreciate you for all of your hard-work and dedication to excellence. We know that life can get hectic and busy – especially around here this time of year. We also know that this can take its toll on your body and your health.

Re-invigorate yourself today at our “Micro-Wellness Fair” brought to you by well@work.

Join us and enjoy any or all of the following free services: Relaxing Chair Massage, Delicious Smoothies, Healthy Snacks, Incredible CrossFit and Yoga Demos and Spine and Nerve System Stress Analysis.

Featuring the Local Wellness Co-Operative providers:
- Massage Envy
- Bonfire Health
- Franson Family Chiropractic
- CrossFit 5 Plus
- Namaste Yoga
- RawBerts Whole Foods

Take a healthy break today and join us for the Wellness Fair...We’ll see you there!

HR / Wellness Director

For more on well@work, see DC Academy Module 77.
Spinal Screening
(Module 80)

Spinal Screenings can be the most consistently effective part of your External Marketing.

To begin, form a stellar team, to work hand-in-hand with your Biz Dev Expert. Your Screening Team is your External Sales Force. They must be outgoing and energetic, and should have sales training and experience. Your Team Captain will coordinate with the Biz Dev Expert, and lead the team members. Other positions include: Greeter, Facilitator, Screener, Scheduler, and Set-up/Break-down. At minimum, you can use three people: one to Greet, the Doctor as Team Captain and Screener, and another member to Schedule; all three can share in set-up and tear-down.

Once you’ve chosen a team, train them! Start with an orientation, then train everyone on all relevant scripting and procedures. Role-play, and use the Competency Checklists. Teach them about your purpose, and remind them how important their energy is for attraction. Make sure you have systems in place to keep track of goals and records.

Next you need a booth! It will, of course, be influenced by the venue, but think creatively about appearance - you want it to be engaging and intriguing, as well as functional. Flow is important!

Keep your ABCs, "Always Be Converting" in mind! Check as many people as possible, and schedule everyone who is ready. Be engaging, direct, and clear. Build curiosity, urgency, value, and scarcity.

The Greeter pulls people in. They should be attractive, outgoing, and great at asking provocative questions that start a conversation. For example: As they ask questions, they should hand out a clipboard with a Stress Survey and pen on it.

Once the prospect has the Stress Survey, the Facilitator steps in. Get their name, greet them, connect with them. The Facilitator sets up their expectations: explains the Survey, explains the testing, reviews the Survey once it's complete, and introduces them to the Screener (usually a Doctor).

The Screener must continue to build the Empathetic Connection. Then they perform the actual Spinal Screening, and close with a Call to Action that asks the prospect to schedule an appointment.

The Screener introduces the prospect to the Scheduler, who then takes care of scheduling the appointment, receiving payment, and getting - and giving - contact info. After the Screening is done, the Scheduler is responsible for follow-up calls as well.
Day 0 – Spinal Screening

(BSE) BEST PRACTICES

• Explain “Posture is the window to the spine” concept
  
  o What does posture tell us?
  o Healthy posture
    ▪ Head balanced over shoulders and hips
    ▪ Spine in proper alignment
  o Shifts in posture and weight balance are signs of nerve irritation

• Have patient remove items from pockets
• Hang jacket/sweatshirt/hat on hook

• Postural Study
  
  o Patient faces forward
  o Look Straight ahead
  o Stand relaxed with hands at sides
  o Take AP photo (include head and shoulders)
  o Patient turns 90 degrees
  o Take full length lateral photo
  o Patient turns with back to DC and steps up on balance
  o Take full length PA photo
  o Dictate one or two relevant findings to patient

• Weight Bearing Study
  
  o Unlock balances
  o Ask patient to remain still
  o Let balances settle
  o Simultaneously lock both balances
  o Write down patient name and weights on BSE Checklist
  o Dictate one or two relevant findings to patient
Spinal Screening: Scripting
(Module 80)

Procedure:

At an ideal screening you have at least 3 people working the event, a Greeter, a Doctor, and a Scheduler.

The Greeter draws people to the screening table / tent and explains what we are doing. They then hand the person a copy of our Spinal Health Survey and give them a minute to fill it out.

If you have 4 or more staff working the screening you may have a Facilitator that explains the screening process to the person being screened before passing them to the DC for the actually Posture Screening.

The Facilitator or the DC will explain what the screening is and what it tells us about the health of their nervous system. The DC then performs the Posture evaluation and recommends scheduling a New Patient Exam.

If the person wants to schedule the New Patient Exam the Doctor would then pass the person to the scheduler to set up the appointment.

It is important to collect payment for the New Patient Exam at the screening. This greatly increases the likelihood that the person will actually show up for their NP Exam and weeds out the people who are not really interested in scheduling but don’t want to say “No” to us in person.

It is also important that the person provides us with contact info, especially a phone number so that we can call them the day before their Exam to confirm the appointment.

Greeter Script:

When was the last time you had your spine and nerve system stress screened? Let’s get you checked!
Please fill this out and have a seat (Hand them the clipboard) and I will introduce you to the doctor.
Facilitator / Doctor Script: Anchoring them to why they are here.

PATIENT you’re struggling with SYMPTOM? Is that why you stopped today? Before I introduce you to the Doctor so we can find out what may be causing your SYMPTOM, let me explain to you what we’re doing here today. The doctor will be checking your spine and nervous system for indicators of nerve irritation, which may be responsible for your SYMPTOM. Let me explain the test to you.

******For someone with “no symptoms”**: So nothing is concerning you regarding your health today? It’s always refreshing to find someone who is concerned with the objective state of the health of their body. So let me explain to you what we’re looking for. *(Think Goals!)*

We’re going to be performing a test called a Bio-Structural exam. Your posture is the window to the spine. Does it make sense that a healthy body will be balanced? - the eyes would be level over the shoulders, the shoulders level over the hips and the hips level with the ground? And, that the spine would be straight up and down? Does it also make sense that a healthy body would carry its’ weight evenly from side to side? Well, the body is very smart. If you do have nerve irritation in your spine the body will lean away from the irritation to allow the nerve to breathe and to remove pressure. This gives us two things that we can measure:

1) Postural deviations away from normal

2) The difference in how you carry your body weight from side to side.

Make sense? Good. Let’s get you checked.

Doctor Script: Facilitator will introduce the patient to the Doctor and explain why the patient stopped by the screening.

Hello. NAME, I’m Dr. NAME.

So you’ve got SYMPTOM? Is that what you’re most concerned about? Tell me more about this. How long has this been going on? What have you been doing for this for relief? How has that been working? So talk to me, how bad does this get? Does it interfere with anything?

We’re going to check you to see if your body has any indicators of nerve irritation because we’ve had great results with PATIENTS JUST LIKE YOU, once we found what was causing their symptoms. So I want see if we can find out what’s causing your SYMPTOM. How does that sound?
Please step up with one foot on each balance, facing this way. Look straight ahead and hold still.

**Review findings**

Now see here how your carry 10 pounds more on your left than right? Let’s see what’s causing that. Take a look at your picture... *(Discuss their posture with them)*. These nerves not only go to muscles and extremities, but they also go to **RELATED BODY SYSTEMS**.

**THE CLOSE**

*PATIENT*, I’m concerned about what I’m seeing here. These are certainly indicators of nerve irritation, and these may very well be the cause of your symptoms. But in order for me to confirm that, we’re going to need to do a more in-depth examination. This is what I recommend you do; take advantage of what we’re offering here today. Which is our complete new patient examination in the office.

******For someone with “no symptoms”: Just like if a good dentist sees some plaqueing and softening going on he’s going to tell you about it. Well clearly, there’s something going on here. What an advantage that we have to catch something like this before crisis happens. There’s certainly something going on here that I would like to look further into to keep you out of crisis.

This includes a consultation, full chiropractic exam, any and all X-rays necessary and a full report of findings which will explain to you what we’ve found and how we can help. This is regularly a $285 exam. But because of the event/ our relationship with we’re offering that for $47 today.

I want to do that examination for you, *patient*, to find out how I can help you. How does that sound to you?

******If patient asks if you found the cause of their symptom: “I don’t know, but what I do know is that you’ve got indicators of nerve irritation that could be causing your symptoms. We need to do a more in-depth examination to find out if we can help you.”

Let me introduce you to SCHEDULER NAME. SCHEDULER NAME I’d like to schedule *PATIENT NAME* for my next available appointment next week.
Scheduler Script:

So, NAME, I am going to be scheduling you for 45 minutes on the doctor’s schedule, so to hold your spot on his schedule we will collect your $47 dollar deposit today. (We can take cash, check or charge). Great.

What time works better for you, earlier or later? (Suggest two times.) 8:45 on Tuesday? Great. I will give you this envelope that has directions to the practice, a welcome letter, and a new patient intake form that you can fill out at home. It will save you some time in the office. And the team at the office will give you a confirmation call the day before, to make sure you have directions and are prepared for your appointment. Our team is great, you will really enjoy meeting them at the office.

Stress and Health Survey

Please print clearly and complete all fields:

<table>
<thead>
<tr>
<th>Name:</th>
<th>Date of Birth:</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>Last</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address:</th>
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</thead>
<tbody>
<tr>
<td>Street Address</td>
</tr>
<tr>
<td>Apartment Number</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>State</td>
</tr>
<tr>
<td>ZIP Code</td>
</tr>
</tbody>
</table>

| Home Phone: | Cell Phone: |

| Email Address: |

Stress
Chronic stress causes disease. The most common causes of chronic stress are mental, physical and chemical. Indicate which cause(s) contribute to your stress:

- Mental stress
- Physical stress
- Chemical stress

Please check the box next to any health problems you currently have, or have had in the past:

- Low back pain
- Sinus infections
- Allergies
- Poor immune system
- Numbness / tingling in upper extremities
- Numbness / tingling in lower extremities
- Neck pain
- Fatigue / Lack of energy
- Dizziness
- Numbness / Tingling in upper extremities
- Numbness / Tingling in lower extremities
- Headaches
- Difficulty sleeping
- Trouble focusing
- Digestive problems
- Loss of balance

FOR OFFICE USE ONLY

<table>
<thead>
<tr>
<th>Appointment Date:</th>
<th>Appointment Time:</th>
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</thead>
<tbody>
<tr>
<td>Non-Refundable Deposit:</td>
<td>Method:</td>
</tr>
<tr>
<td>Scheduler:</td>
<td></td>
</tr>
<tr>
<td>Screening Event:</td>
<td>Event Date:</td>
</tr>
</tbody>
</table>

For more on Screenings, see DC Academy Module 80.
Screenings @ Gyms  
(Module 81)

The Gym environment - a great example is a CrossFit Box - is natural for Chiropractic to gain footing. Gyms are full of people already committed to fitness and wellness. They just haven't heard about chiropractic yet.

For all your interactions with a gym (or yoga studio, or martial arts dojo...), here are some ground rules.
1. Insider vs. Outsider
2. Be a Raving Fan
3. Don't threaten their territory
4. Know their expertise
5. Know your expertise
6. Know your unique value
7. Know their problem - that you can solve
8. Communicate HOW you can solve their problem
9. Deliver Real Value

The BulletProof Recovery Program is designed specifically with CrossFit in mind, but can be adapted to any training environment. Here is an outline for the BulletProof Recovery Program:

1. 3 Legged Stool of Performance
   a. Technique
   b. Programming
   c. Recovery
2. Recovery:
   a. Rest
   b. Fuel
   c. Care
3. Care:
   a. Self Care
   b. Professional Care
4. Problems/Movement Faults:
   a. Technique
   b. Fitness
   c. Bio-Mechanics
5. Functional Screening
   a. Static Posture
   b. Under Load: Deadlift
   c. Under Load with Movement: Over Head Squat
6. Ask them what they see - get their trainer involved, too!
7. Schedule a Consultation!

For more on how to develop win-win relationships with gyms, listen to the "Selling to CrossFitters Marketing Call with Dr Ryan Hewitt."
Sample Functional Assessment

Name: ___________________________ Date of Birth: _________
First Last

Best Phone #: ___________________ Email address: ________________

Please check the box next to any health problems you currently have or have had in the past:
☐ Low-Back Pain ☐ Allergies/Sinus Problems
☐ Legs/Feet Problems ☐ Dizziness/Balance Issues
☐ Bowel/Bladder Issues ☐ Trouble Focusing
☐ Reproductive Problems ☐ Mid-Back Pain
☐ Neck Pain ☐ Poor Immune System
☐ Headaches ☐ Heart or Breathing Problems
☐ Arms/Shoulders/Hand Problems ☐ Indigestion
☐ Low Energy ☐ Difficulty Sleeping

How do these issues affect you?
Interferes with: Other:
☐ My Exercise _____________________________
☐ My Work _______________________________
☐ My Sleep _______________________________
☐ My Energy ______________________________
☐ My Mood/Attitude _______________________
☐ My Family Life/ Relationship ______________

Which Movements Cause Pain? Other Movements:
☐ Squat _________________________________
☐ Press ________________________________
☐ Pull Up ________________________________

Is this issue a priority for you? YES ____ NO ____

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Appointment Time & Date: ________________________________

Non-Refundable Deposit: $ __________ Method: ☐ Cash ☐ Check ☐ Credit

Screening Event: __________ Scheduler: __________ Event Date: __________

For more on Screenings at Gyms, see DC Academy Module 81.
Corporate Wellness Program  
(Module 78)

Once you are ready for a large-scale, multifaceted business initiative, the Corporate Wellness Program is your project. It take a great deal of time, energy, and focus, and is complex. But if you have the resources to devote to this, your ROI will be huge.

The Corporate Wellness Program addresses the 3 domains of the Wellness Lifestyle - Diet-Style, Movement Patterns, and Thought-Life. All content is delivered on-site for a company, school, church, gym, or community organization.

Potential Components:

- Health Talk Series
- Wellness Lifestyle Education
- Diet-Style/Food prep
- Movement Patterns/ Ergonomics
- Exercise Classes
- Stress Mitigation/ Team Building
- Web Resources

Of these, the Health Talk Series is the cornerstone.

- Wellness Lifestyle Overview
- FUEL: How Well People EAT
- AIR: How Well People MOVE
- SPARK: How Well People THINK

Other relevant topics include:

- Double Productivity and Reduce Stress
- Increase Your Energy by 300
- Boost Your Immune System in 21 Days
- Have More Fun While Smashing Goals
- Get 15 Pounds Healthier in 15 Weeks

To maximize return, utilize the following best practices:


**Community Recognition/Prizes.** Don’t forget to use Social Media!

As the Program progresses, generate leads! Use your Biz-Dev expert, keep lists of hot, warm, and cold leads, and ask for testimonials and referrals.

For more, including promotional materials, visit DC Academy Module 78.
Blogging
(Module 88)

Of your online presence, your blog should be your favorite. It is flexible and
dynamic, and is how people learn about you - who you are, what you do, and why
you do it. While your website remains relatively unchanged once you've
established branding, your blog is where you get to have fun. You can
communicate through stories, videos, links to articles; you can promote events,
specials, workshops, and any changes to your practice or team. Your patients
should go to the blog first and always to stay up to date and connected with your
practice. And blogging can connect with Facebook, Twitter, and YouTube, and
drive up your SEO.

Blogging directly correlates to better business results. However, in order to
maximize your blog's marketing potential, it must be:

- Well-Optimized
- Promoted
- Rich with Relevant Content

Business blogging helps your SEO through frequency and use of keywords. Your
blog introduces you as a thought leader, as a problem solver, and as trustworthy.
It provides space to put Call-to-Actions, in the sidebar, and in posts.

6 Essential Elements of Effective Blogging

1. **Repackage**: turn something created for your practice into a blog post
   a. ie, 7 Secrets of Successful Patients: great handout AND great blog
      post!
2. **Brainstorm**: have brainstorming sessions, and consider creating a
   collaborative document to let your team build on each other's ideas. And
   invite your CAs to write posts, too!
3. **Guest Blog**: find chiropractors and others in your network who can
   contribute, and reciprocate by contributing on their blog.
4. **Curation**: be sure all content is valuable, and not just there to be there. And if
   you're providing links to other resources, be sure to credit the authors
   properly. Be careful not to plagiarize!
5. **Increase Frequency**: as you increase frequency of posts, traffic will increase.
   Publish a few times a week if you can. If you can only post once or twice a
   month, be consistent with when you post, and make sure the content is
   engaging.
6. **Optimize**: use keywords to optimize your posts for people's attention and
   search engines.
Some Tips for Optimization:

- Share: include social sharing buttons, and ask for shares!
- Image: include an image that conveys the post's content.
- Title: make the title interesting, so that people have a reason to read it.
- Formatting: use bold words, and bullet points!
- In-Text Calls to Action: include in-text links to other resources.
- Sidebar Calls to Action: use the sidebar well!
- Make it Actionable: offer clear take-aways and things people can DO or take action on.
  - ie, Don't sit in a heated seat after shoveling snow!
- Combined Relevance: draw connections between two seemingly different things increases relevance and interest
  - ie, compare compound interest building wealth or debt to compounding health or sickness
- Entertaining: make the information interesting and fun.
- Definitive: show that you are the expert. Be bold, direct, and compelling.

For more on Blogging, see DC Academy Module 88.
Social Media  
(Module 89-90)

Facebook

Facebook is a necessary tool in your Social Media toolkit. It's great to reach out to your community, as well as link you to other like-minded practices elsewhere.

Start by creating a page! Choose 'Local Business,' and choose a name for the page. Add administrators, and create a username. Make sure it's a 'Fan Page,' not a personal page!

Before diving in, establish the purpose of your page. Why do you want people to visit it? Who do you want to connect with? Why will they want to connect with you? What will you want them to share with others? Write your purpose into a policy, and post it in the Information section of your page.

Plan your posting strategy with your team. Plan what you will post, who will post it, and when. Be consistent - with Facebook, posting at least daily is best.

Familiarize yourself with the page's capability. Set who can post, who can comment, who can message you, your images. Once your page is all set, invite your Facebook friends to like it! Promote your Facebook page on your website and blog, and in your office and emails. And start engaging with other pages as well.

As you get accustomed to it, Facebook offers further paid promotional strategies. For more on that, and general Facebook know-how, check out www.AmpLIFEied.com

YouTube

Video is the preferred media form of most consumers - it gets more views, likes, and shares than text. It also improves your SEO.

Before you begin, be clear about your **brand** and your **message**. Who are you speaking to? Who do you want to attract? (Think about your Marketing Muse here!) Speak to their needs.

Keep your videos short: only **2-3 minutes**. Quality is important here - have good sound, lighting, and camera. Close all videos with **contact information** for your office. To begin with, create 12-24 videos based on certain keywords. (See pages 86-88 for more on creating your own videos!)

Each time you post, embed the video in a blog post and an email. Upload links to all your other social media.
YouTube, continued:

**To Put Videos on YouTube:**

- Start your own Channel
  - Sign in to YouTube
  - Go to "All my Channels"
  - Select "Create a New Channel"
  - Fill out the details

- Title should include:
  - Keywords (specific symptoms)
  - Your Town and State
  - Location and Specialty Descriptors

- Tags should
  - Be variations of Title
  - Have Keywords

- Video Description should include:
  - Website Link
  - Title Variations
  - Contact Phone Number

**Content Ideas To Begin:**

- Story about You
- Story of Your Practice
- Compelling Testimonial
- Tour of Office
- Common Questions about Chiropractic
- Introduce Symptoms or Conditions
- Talk about Common Patient Presentations/Health Issues
- Explain Results/Success Stories
- Explain Chiropractic - Keep it Simple!
- Create Trailers or Shorts from your Workshops

For more on leveraging Social Media, see DC Academy Modules 89 - 90.
CREATING VIDEOS
Setting Up Your Studio, & Filming Your Own Videos (Module 95-96)

As you know, videos are the best way to reach out to people. And building your own studio is simple and straightforward. Here’s how to do it!

The Set-Up & Equipment:
- One Camera (ex: Panasonic GH3)
  - spare batteries
  - memory cards
  - card reader
  - tripod
- Lapel Microphone
  - 9 volt batteries
- Three Lights
  - 2 Front
  - 1 Back
  - Over-head
- Backdrop
  - Rack & Paper or Paint the wall
- Teleprompter
  - iPad & app
  - Field Monitor & Tripod
  - Foot Pedals
- Scripting
- Video Editing and Post-Production
  - Dropbox

Filming your own videos is a four stage process:

1. Writing and Editing your Copy
2. Preparing your Script for Recording
3. Capturing Footage On and Off Camera
4. Editing and Post-Production

Of these, preparing your script is the most time-consuming part. The recommendation is that you out-source your post-production unless you are fluent in editing software, because if you do it, this will take most of your time.
Filming Your Own Videos, continued

1. Writing and Editing Your Copy
   a. Plan: Audience/Message/Objective/Topics
   b. Schedule
   c. Editorial Calendar
   d. Outline
   e. Script
   f. Email
   g. Edit on iPad with app
   h. Practice Read
   i. Film!

2. Preparing Your Script for Recording
   a. Write as a Word Document
   b. Email it to yourself
   c. Copy script into Teleprompter Plus App
   d. Format for teleprompter
   e. Set your pace on the teleprompter

3. Capturing the Footage
   a. Do as many takes as you need - the editor will do their job
   b. Set up your 3 lights
   c. Turn on lapel mic
   d. Press Play, and record!
   e. Keep up your energy
   f. Use a field monitor to check your position and appearance
   g. Do a test shot to check lighting, sound, etc
   h. Speak to your Muse - to that individual
   i. Re-record the first 30 seconds once you've completed the script
   j. Check your recording, and re-shoot if necessary
   k. Upload to Dropbox, and share with your Production Expert

4. Editing & Post-Production
   a. Choose someone you know
   b. Preferably an all-star patient
   c. Or turn them into a patient!
MAYA


NEW PATIENT CALL IN

Script:

Thank you for calling CLINIC NAME. This is CA NAME. I can help you.

   Hi, I'd like to make an appointment.

When was the last time you saw the doctor?

   Oh, this is my first time.

Great! Which one of our patients referred you to us? That's great, is a great patient. Be sure to thank them for us! If not referral: How did you hear about us? (workshop, event, Advertisement, etc)

So, before we schedule your appointment I'll need to get some information from you.

May I please get your:
   Full name?
   Address?
   Home or cell phone?
   Date of birth?
   Email address?

Is this appointment for you or for your whole family?

Let me check the doctor's availability. Is a morning or afternoon appointment better for you?

I can schedule a consultation with the doctor either DAY or DAY at TIME or TIME. Which is better for you?

Great, we will schedule an appointment with the doctor on DAY at TIME.

So, NAME, this office visit will begin with a consultation with the doctor at no charge. If the doctor decides that further examinations are necessary, cost will be discussed with you at that time. If that is the case, it is our policy that all new patients take care of any charges in full on this initial visit.

   Ask if they received a referral pack –
if not - I will have one waiting for you to pick up when you come in. Or you can print one right from our website and bring it with you. If the doctor recommends a full exam, which is typically $287, the coupon will keep the cost from exceeding $47.

If Yes – Great! Make sure to bring the coupon with you on DATE. If the doctor recommends a full exam, which is typically $287, the coupon will keep the cost from exceeding $47.

Please allow approximately 45 minutes in our office for the exam. We will need you to fill out some paperwork for us, so we ask that you either arrive about 15 minutes before your appointment in order to complete the form, or you can go online to PRACTICE WEBSITE and print the New Patient Registration Form from home. If you bring in the form completed, you can simply arrive at your scheduled appointment time.

Now, NAME, I have reserved 45 minutes in the doctor’s schedule for your appointment. If for any reason you cannot make your appointment, please call me in advance so I can reschedule it for you.

We look forward to seeing you on DATE & TIME. Have a great day NAME!
NEW PATIENT EXAM CONFIRMATION CALL

Procedure:

Check-In is responsible for confirming all New Patient Exams on the business day prior to the exam, as a way of reminding the patient and making sure that they have all of the details.

Script:

Hi, PATIENT NAME, this is NAME from CLINIC NAME. I am just calling to confirm your New Patient Consultation here in our office tomorrow at DAY and DATE, at TIME.

If you don’t have your copy of our New Patient Registration and History Form, you can either visit our website at PRACTICE WEBSITE and print it out from the New Patients page, or you can get a blank copy here at our office. Either way, if you don’t have a chance to fill one out ahead of time, please come in about 10 minutes early for your appointment to complete the form.

Please make every effort to keep this appointment but, if for some reason you can’t make it, please call us here at the office to reschedule. Our number is PHONE NUMBER.

We hope you have a healthy, happy day, and look forward to seeing for your New Patient Exam tomorrow at TIME!
Expectation Thread Videos: Creating Connection (Module 10)

The expectation thread videos are a tool to deliver a message of connection. They show the patient that you, their doctor, have empathy, certainty, and passion.

There are three videos:
- Video before Day 1 visit
- Video 2: Post Day 1 visit
- Video 3: Post Day 2 (ROF)
Expectation Thread Video 1: Pre Day 1 Visit

This is sent automatically after a patient schedules their NP appointment. It creates connection between the patient and the doctor. It reduces no-shows and re-scheduling, and provides a positive first impression.

The key components are as follows:
- Introduction/Welcome
- Pre-Frame
- Set expectations for 1st visit
- Top Level
- Put at ease

Example Script: Video 1 – We Look Forward to Your Visit

Hello. I’m Dr. Stephen Franson, clinic director at Franson Family Chiropractic in Beverly. On behalf of my entire team, welcome to our office. Franson Family Chiropractic opened its doors over 16 years ago. My wife, Dr. Camilla Franson, and I decided that we were going to make a difference in a community, and we have been blessed. We’ve had the opportunity to help literally thousands of patients - thousands of families - get their health back. And now we're going to have the opportunity to meet you and we're excited about that. The purpose of this video is to help set your expectations for your first day in our clinic. Now, this may be your first time visiting a chiropractor. So, allow me to unpack that first day for you so you'll know what to expect.

You should know that this visit is all about you. We're going to talk about you. We're going to talk about your health concerns. We're going to talk about your health challenges. And we're going to talk about your health goals. The doctors are going to listen to your story. We want to know exactly what's going on with you, so that we can first determine if you’re in the right place. And if you are, exactly what examinations need to be done in order to serve you best. Now patients come to us for a variety of reasons. Unfortunately it’s far too common that people are already struggling with some type of health crisis, some type of condition or symptom, common presentations or things like neck problems and neck pain, low back problems, low back pain, disc issues or sciatica. It might be headaches like migraine headaches or sinus issues, allergies, asthma, or maybe a pediatric issue. Those may be the things that bring people into our clinic, but people stay in our clinic because of the results that they get and because of the education that they receive. Once you learn that you are designed to be healthy, that you can be healthy, that as long as your nervous system is operating without any interference, that your body has the unique ability to heal itself and to function optimally. So before your visit, I have some homework for you. I have two questions for you to ponder. The first is, are you as healthy as you want to be? And the second is, what do you need to start doing to get there? I’m Dr. Stephen Franson, clinic director at Franson Family Chiropractic, and we really look forward to meeting you.
CHIROPRACTIC INTAKE & HISTORY

PATIENT INFORMATION

Patient Name ____________________________ ____________________________
FIRST NAME MIDDLE INITIAL LAST NAME
Address ________________________________________________________________
City ____________________________ State ____________________________
Home Phone ____________________________
Cell Phone ____________________________
Email ____________________________
Sex □ M □ F Age _____ Birthday ______
□ Married □ Widowed □ Single □ Minor
□ Separated □ Divorced □ Partnered
Employer / School ____________________________
Occupation ____________________________
Spouse’s Name ____________________________
Spouse’s Employer ____________________________
Spouse’s Occupation ____________________________

IN CASE OF EMERGENCY, CONTACT
Name ____________________________
Relationship ____________________________
Contact Number ____________________________
Who may we thank for referring you? ____________________________

HOW CAN WE HELP YOU?

What brings you in today? ____________________________
________________________________________________________
If you are already experiencing a symptom, what is it? ____________________________
________________________________________________________
How bad is it? How intense are your symptoms? (circle)
0 1 2 3 4 5 6 7 8 9 10
NO SYMPTOMS INTENSE SYMPTOMS
Please circle areas to the right where you have pain or other symptoms:

What does it feel like? (check where appropriate)
□ Numbness □ Sharp
□ Tingling □ Shooting
□ Stiffness □ Burning
□ Dull □ Throbbing
□ Aching □ Stabbing
□ Cramping □ Swelling
□ Nagging □ Other ____________________________

IMPACT OF YOUR SYMPTOMS

How is this symptom / condition interfering with your life? (check where appropriate)

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<th>Mild Effect</th>
<th>Moderate Effect</th>
<th>Severe Effect</th>
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<td>Self-Care</td>
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How committed are you to correcting this issue? 0 1 2 3 4 5 6 7 8 9 10
NOT COMMITTED VERY COMMITTED
PATIENT WELLNESS ASSESSMENT

ILLNESS-WELLNESS CONTINUUM

On the arrow diagram above:
A. What number do you think represents your health today? ________________________________
B. In what direction is your health currently headed? ________________________________

What are your health goals?
IMMEDIATE ________________________________________________________________
SHORT TERM ______________________________________________________________
LONG TERM ______________________________________________________________

CHILDREN & PREGNANCY

How many children do you have? ________________________________

Children's ages? _________________________________________________________
Children's health concerns? ________________________________________________

Are you currently pregnant? □ No □ Yes, I am due ____________

Number of past pregnancies? ________________________________
Health concerns regarding this pregnancy? ________________________________

HEALTH & ILLNESS HISTORY

☐ AIDS/HIV ☐ Alcoholism ☐ Anxiety ☐ Arteriosclerosis ☐ Arthritis ☐ Asthma/Allergies ☐ Back Pain ☐ Cardiovascular Issues ☐ Cancer

☐ Circulation Issues ☐ Childhood Illness ☐ Depression ☐ Diabetes ☐ Digestive Issues (Constipation/Diarrhea/GERD/IBS) ☐ Elbow/Wrist/Hand Issues ☐ Endocrine Issues (Thyroid) ☐ Foot/Ankle Issues ☐ Gout


ALLERGIES, MEDICATIONS & SUPPLEMENTS

ALLERGIES (list) ___________________________________________________________
MEDICATIONS (list) _______________________________________________________
SUPPLEMENTS (list) _______________________________________________________

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**PATIENT INFORMATION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
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<td>Patient Name</td>
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<td>Address</td>
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<td>State</td>
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<td>Sex</td>
<td>M ☐ F ☐</td>
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<td>Age</td>
<td>Birthday</td>
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**IN CASE OF EMERGENCY, CONTACT**

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<td>Name</td>
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<td>Relationship</td>
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<tr>
<td>Contact Number</td>
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**HOW CAN WE HELP YOUR CHILD?**

- Wellness Checkup ☐ Other: ____________________________

If your child is already experiencing a symptom, please describe it:

- ____________________________
- ____________________________
- ____________________________
- ____________________________

Has your child been treated on an emergency basis? ☐ Yes ☐ No

Please describe: ____________________________

**PREGNANCY HISTORY**

Did you experience any complications during your pregnancy? (check all that apply)

- Back/Other Pain ☐ Gestational Diabetes ☐ Pre/Eclampsia ☐ Strep B ☐ Nauseau/Vomitting
- Pre-Term ☐ Fatigue ☐ Swelling ☐ Other (please describe) ____________________________

**BIRTH HISTORY**

Type of birth (check all that apply):

- Hospital ☐ Birth Center ☐ Home ☐ Normal / Vaginal ☐ Breech
- Cesarean ☐ Scheduled/Induced ☐ Epidural

Problems during labor / delivery?

- Antibiotics ☐ Congenital Anomalies ☐ Failure to Thrive ☐ Jaundice ☐ Meconium
- Respiratory Distress ☐ Extended Hospitalization ☐ Other ____________________________
**GROWTH & DEVELOPMENT**

Infant feeding:  
- [ ] Breast  
- [ ] Bottle  
- [ ] Formula

Number of hours of sleep each night:  
Quality of sleep:

At what age did the child:
- respond to sound:  
- crawl:  
- hold head up:  
- stand:  
- sit unsupported:  
- walk unsupported:

**CHILDHOOD DISEASES, ILLNESSES & VACCINATIONS**

Has your child had (check all that apply)?:
- [ ] Chicken Pox  
- [ ] Measles  
- [ ] Rubeola  
- [ ] Mumps  
- [ ] Rubella  
- [ ] Pertussis/Whooping Cough

Has your child ever suffered from (check all that apply)?:
- [ ] Allergies  
- [ ] Anemia  
- [ ] Arm Problems  
- [ ] Asthma  
- [ ] Back Aches  
- [ ] Bed Wetting  
- [ ] Behavioral Problems  
- [ ] Digestive Issues (constipation/diarrhea)  
- [ ] Dizziness  
- [ ] Headaches  
- [ ] Diabetes  
- [ ] Hyperactivity  
- [ ] Hypertension  
- [ ] Jeavuenile Rheumatoid Arthritis  
- [ ] Joint Problems  
- [ ] Lung Problems  
- [ ] Neck Problems  
- [ ] Neuritis  
- [ ] Orthopedic Problems  
- [ ] Paralysis  
- [ ] Poor Appetite  
- [ ] Ruptures/Hernias  
- [ ] Sinus Trouble  
- [ ] Tuberculosis  
- [ ] Walking Problems

Have you vaccinated your child?
- [ ] No  
- [ ] Yes  
- [ ] As scheduled  
- [ ] Delayed Schedule

**ALLERGIES, MEDICATIONS, SURGERIES & FAMILY HISTORY**

<table>
<thead>
<tr>
<th>ALLERGIES (list)</th>
<th>MEDICATIONS (list)</th>
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<th>SURGERIES (list)</th>
<th>FAMILY HISTORY (list)</th>
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**SIBLINGS**

How many children do you have?  
Children's' Ages:  
Childrens' health concerns:

Number of pregnancies:  
Are you currently pregnant?  
- [ ] No  
- [ ] Yes, I'm due:

Health concerns regarding this pregnancy:

**Authorization for Care of Minor**

I hereby authorize this clinic and its doctor(s) to administer care as they so deem necessary to my son/daughter/ward.

Signed:  
Witnessed:  
Date:  

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MARKETING TOOLS
Trouble Shooting Attraction
(Module 44)

New Patient Prospects are the life-blood of your practice. It is the metric that measures your Mission. A New Patient Prospect is someone who has reached out and scheduled an appointment. If these numbers are down, you need to look at your Marketing Plan.

4 Pillars of Marketing
• Internal
• Passive
• External 1 (Outside Talks)
• External 2 (Spinal Screenings, Radio, Webinars, etc)

• Differentiate: Internal (Referrals) vs. External (Marketing Leads)

Internal Referrals:
Assuming Internal Marketing is happening
• Energy: what’s your practice energy like? Remember E=MC2
  o Money
  o Crucial Communications
  o Vision Casting
    ➢ Training & Equipping
    ➢ Goal Setting
    ➢ Recognition & Celebration
    ➢ Discipline
• Patient Wait Time: is it increasing?
  o Goal: 7-15 minutes
  o Compliance: is it going down?
• Schedule: is it balanced?
• Walk-in/Call-in/Late/Early: what’s your policy?
• Referrals: are you asking? Your patients are less likely to think of it if you don’t remind them!

Audit your Marketing Calendar:
• Internally:
  o Balanced?
  o Themes?
    ➢ Month Long (Month 1)
    ➢ Week Long (Month 2)
    ➢ 1 Day Event (Month 3)
• Externally:
  o Annual Events
  o Special Events
  o Anchor Events
Trouble Shooting Attraction, continued

New Patient Prospects are the life-blood of your practice. It is the metric that measures your Mission. A New Patient Prospect is someone who has reached out and scheduled an appointment. If these numbers are down, you need to look at your Marketing Plan.

Outside Marketing Leads

- Frequency
- Consistency
- Quality
  - Presentation Skills
  - Messaging
  - Scheduling Strategies:
    - Get scheduled AND payment at event
    - Give NP Intake Form, Office Directions/Phone/Website
  - Competency of Team
  - Appearance of Booth

Compare NP Prospects (Scheduled) with NP Exams (Shows)
Is there a difference between NPs from Inside Referrals and Outside Marketing?

- Train Screening/Outside Talk Team
- Train on NP Call-In Script!
- Expectation Thread Videos: are you doing them?

For more on Trouble-Shooting Attraction, see DC Academy Module 44.
## TRP Coaching: DC Training System: Competency Checklist

<table>
<thead>
<tr>
<th>To be completed by:</th>
<th>[Name]</th>
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<tr>
<td>Deadline:</td>
<td>[Date]</td>
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### Day 0: Promotion/Screening/Outside Speaking

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<th>Date</th>
<th>Initials</th>
<th>Skills</th>
<th>Notes</th>
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<td>Creating/Scheduling Events</td>
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<td>Creating Anchor Campaigns</td>
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<td>Tracking Events and Outcomes</td>
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<td>Lead Generation</td>
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<td>Scheduling Venue / Organization</td>
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<td>Technology</td>
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<td>Scheduling New Patients</td>
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### Day 1: New Patient Arrival

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<td></td>
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<td>NP Check In: Purpose: Curiosity, Scarcity,</td>
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<td></td>
<td>Urgency, Anticipation</td>
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<td>Office Tour (What do I get?)</td>
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<td>Meet and Greet (Building Rapport)</td>
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<td>NP Preconsultation (Uniqueness, Curiosity)</td>
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<td>NP Consultation (100 yeses / micro-agreements)</td>
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<td>Trauma History (Urgency, Curiosity)</td>
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<td>OPQRST (Building the Bridge)</td>
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<td>NP Examination:</td>
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<td>● Biostructural Exam</td>
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### Day 2: Check-In / Reports

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<td>Group Report of Findings (Group ROF):</td>
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<td>● Group ROF Introduction (GR1 Intro)</td>
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<td>● Video Orientation Part 1</td>
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<td>● Group ROF Part 2: X-Ray (GR1 Outro)</td>
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<td>Individual Report of Findings (IR1):</td>
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<td>● Individual ROF Break-Out (Knee to Knee)</td>
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<td>● X-Ray Review (Problem Report)</td>
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<td>● Recommendations: Time Commitment (IR2)</td>
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<td>● First Adjustment (Reverence)</td>
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<td>Post Adjustment Instructions (ADOC/TCA)</td>
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<td>Group R2/Recommendations for Care:</td>
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<td>● Energy Commitment (GR2)</td>
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<td>● Financial Commitment (GR3)</td>
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<td>● Office Policies (Take-Away)</td>
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<td>Individual R2/3 Break-Out</td>
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<td>Day 2 Check-Out at Front Desk</td>
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<td>Tickle Call (DC)</td>
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<td>Recommendations for Care</td>
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<td>Financial Plans</td>
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<td>Lifetime Family Wellness Program</td>
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### Day 3: Check-In at Front Desk

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<th>Date</th>
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<tr>
<td></td>
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<td>Day 3 &quot;Break-In&quot; (Close, MAP, Policies, etc)</td>
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</tbody>
</table>
### Day 3 Process Orientations (Flow, Hot Seats, etc)

### First Regularly Scheduled Adjustment (2nd Adj)

## Remarkable Retention: Build Successful R4/5 Re-Conversion

<table>
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<th>Date</th>
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<th>Skills</th>
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<td>Day 4 Regular Office Visit Protocols Review</td>
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<td>Patient Care Overview (The Adjustment Process)</td>
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<td>The Forensics Report (Closing the Side Door)</td>
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<td>Defining the Product</td>
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<td>Table Talk (Tuition, Big 5, Tap the Tire)</td>
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<td>Workshop (Create Your Vision):</td>
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<td>● The Message (Take-Away, Swing Thought)</td>
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<td>● The Workshop</td>
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<td>● The Follow-Up</td>
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<td>Progress Examination (PE):</td>
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## Additional Skills

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