



The DOs and DON'Ts in Private Practice

by Joshua Swart, L.Ac.

A Legacy Acupuncture Supply Practice Resource
Helping you improve your techniques, knowledge, and clinical outcomes

Ideal for...

- Students who want an edge when they graduate
- Recent graduates who want to start off right
- Associates and employees looking to open their own clinic
- Seasoned practitioners who need to make tweaks to improve their practice

What's Inside

- Benefit from the lessons learned in nearly 20 years of practice and teaching
- The many hats of private practice
- The DOs and DON'Ts of private practice
- Why not work for someone else?

FORWARD: BENEFIT FROM THE LESSONS LEARNED IN MY 20 YEARS OF PRACTICE AND TEACHING



Joshua Swart, L.Ac.

I graduated and opened my first clinic in 2002. From that moment on through the next twelve years, I made many mistakes and struggled. I had several clinics over the years- some more successful than others and several flat-out failures. Chances are if it is a terrible idea or a wrong way to practice and to think about things, I have probably done it. However, I did eventually figure some things out and found some success. With my experiences, I can say that I learned a few things about what to do and what not to do with running a practice.

Around six years ago I really had a moment of enlightenment that would revolutionize the way I understood this profession. I came across Dr. Tan, Jimmy Chang, and several others who had large and busy practices and taught incredible techniques. I felt excited, but also betrayed, angry, upset, and appalled that this information that was out there was being ignored by the schools. Amazing clinical and business skills were available, yet were the exception and not the norm? I had been struggling

and didn't have to be. And I was about to find out that I was not alone in this, as in fact there were thousands of people around the world also experiencing unnecessary struggle and frustration.

I knew I needed to get the word out. The status quo in our profession was unacceptable and there needed to be radical change. If I could be helped and experience the joy of practicing, so could others! So I decided to take all that emotion and do something with it. I started a community on Facebook with Michael Peluso, L.Ac. to talk about and spread these techniques and bring the awareness, excitement and hope that I experienced to others. And I connected with hundreds upon hundreds of other practitioners and discovered that again, my past experiences were not at all unique. While some practitioners were more resourceful than I was and had certain tools and business acumen that I lacked, many of my challenges were shared by the majority of practitioners at one time or another in their careers. They too struggled, and it had become clear to me that it was not necessary.

That Facebook community would grow to over 7000 members, and from that community a continuing education company would emerge. An education company that connected with even more successful practitioners and instructors and provided education of only the most applicable skills in techniques and business. Skills that actually worked.

With all the experiences above, I became passionate about sharing knowledge to help other practitioners avoid the unnecessary pitfalls and excessive struggle and make it easier to find success. It is something that I enjoy doing to this day, and this whitepaper is a continuation of that passion.

DRAW FROM THE NEGATIVE AND POSITIVE EXPERIENCES

Within this book, I offer some basic but extremely important do's and don'ts in working in this field and building one's practice. The ideas and topics in this book are not only from my personal experiences, but also from those who I have worked with and studied under. Being involved in continuing education over the last five years, having put together many live seminars, and working with other practitioners who have revolutionized this field, I have learned a lot. Hopefully, in this book I can transmit some of that to you as well.

One important point to mention: This book would not be good enough if I only drew on my negative experiences, though I do think there is a lot to learn from this. However, it is just as important to convey how I found success for myself and pass that on too. I can attest through personal experience that if we look at what those who are successful do and repeat it, we too can find success. While we all tweak things to find our own unique way, there really is no need to reinvent the wheel from ground zero. If you have to start somewhere, why not get an advantage?

It is important to note that while the points made in this book do work and will make you a better practitioner, this book does not constitute an exhaustive list of what to do and what not to do in private practice as a TCM practitioner. Instead, it is my hope that it will be helpful to new practitioners

to avoid pitfalls and practice better from the start, and for established but struggling practitioners to turn things around and start experiencing the joy of practicing.

Of course, there will also be those practitioners who read this and think, "But I did or didn't do it this way and it worked" to which I say, yes, there will always be anomalies. And what "works" is subjective in and of itself. But even so, I can confidently say based on what I have experienced in private practice, through communicating with thousands of practitioners the world over, and running a continuing education company, it is clear that the topics, issues, and suggestions I cover in this book are experienced by the majority of practitioners at one time or another in their career.

Finally, it is important to know that we are in a renaissance period with regards to this field. At no point in history has so much information been available to us in so many different formats. Pioneers in the 70s and 80s had much less to work with in both content and ways of obtaining the information. However, with this vast knowledge that is available today, it can be overwhelming and distracting, and can pull a practitioner to pursue quick and easy courses, avoiding critical foundational theory and principles. Even so, we are very fortunate to be practicing Chinese Medicine in this day and age, and it is much better to have a lot more information available than a lot less.

CHAPTER ONE: THE MANY HATS OF PRIVATE PRACTICE – PRACTITIONER, OFFICE MANAGER, AND BUSINESS OWNER

Practice management is a vast topic and something nearly every practitioner struggles with at one time or another. I believe the lack of knowledge of owning a business, the nuance of managing a practice, and having to learn it on the fly, leads to the high failure rate of TCM practitioners in the U.S. Surveys reflect this. In 2010 the NCCAOM conducted a survey (this is no longer available) and found some 70% of practitioners close their doors within five years. While it may be better today, I believe the number is still quite high.

While job opportunities are improving, the reality is that in order to practice this medicine, we will likely have to go into private practice. That is something that no other profession – not MDs or even Physical Therapists – really have to contend with. In our profession, we must handle all aspects of practice, not only increasing our clinical skills, but also managing all aspects of business including marketing, scheduling, cleaning, clinical layout, and even cashing out patients. For many, this is a reality until they can hire an employee.



Some 70% of practitioners close their doors within five years – 2010 NCCAOM Survey.

Not only must we be great practitioners and able to handle patient management, we now must also become self-employed business owners. And the truth is, most of us simply suck at it. Luckily, there are many people who have blazed trails for us, and we can draw from their experiences to save us a lot of time, money, and burnout.

The business you choose is for your survival and longevity. When you do well, you are a better practitioner. When you have more money; your stress levels go down. You can learn more skills, take more business courses, and do the things that nurture your soul. I have talked to acupuncturists who had practiced for many years (up to 25 years) who could not afford a book. Mind you, while there could be legitimate reasons for this, I cannot justify so many practitioners having this problem. Heck, working in any profession for 25 years and having that problem is a serious red flag. Mind you, these practitioners were also invigorated by the community and education we provided. It is never too late to find success.

My aim is to prevent practitioners from not only struggling, but to help them thrive and achieve the best practice and personal life possible. The basics are a good place to start, and the following do's and don't's are a way to lay out these basic concepts in an easy to relate to and easy to understand way.



CHAPTER TWO: THE DO'S AND DON'TS OF PRIVATE PRACTICE

The following do's and don'ts cover a variety of qualities, traits, and habits that can make you a better practitioner and make your practice run better. The busiest clinics and top practitioners will all have some degree of the following: Excellent clinical skills, good business acumen, a grasp of financial literacy, and excellent time management skills. They know exactly what they want, have a passion to help people, and are not too focused on only business or only on clinical skills. You too can be this kind of practitioner in your own unique way. With that, let's get into what you should and should not do as a practitioner.

KEY TAKEAWAYS: THE TOP TRAITS OF SUCCESSFUL PRACTITIONERS



Excellent clinical skills



Good business acumen



Grasp of financial literacy



Excellent time management skills



A clear vision of what they want



A passion to help people



Equally focused on business and clinical skills

DO HAVE A BUDGET AND A CLEAR IDEA OF HOW MUCH MONEY YOU NEED TO MAKE

This is a huge problem in our field, and there are several reasons for it:

- A focus on patient care with not enough on business/practice management
- Terrible practice management and business classes in most schools
- Lack of opportunities to work for someone (though this is improving)
- Setting rates based on “feelings” instead of facts
- Poor relationship with money
- Setting rates based on ideology or social justice reasons (example – health care is too expensive)
- Setting rates based on perceived patient ability to pay (shopping out of your own pocket)
- Not having a budget and clear understanding on what you need to make to pay business and personal expenses

For most of us, we went into this field without any clue what we would do after we graduate. We figure we will just hang a shingle and start seeing patients, right? And heck, they’ll come to us because we are offering an answer to their

problems that conventional medicine cannot! We have special powers!

No, we are not special, and we are not guaranteed anything, other than struggle and pain thinking like this. “Build it and they will come” will NOT work and will lead to closing your doors. You must have a clear plan which includes knowing your numbers, what you need to make and therefore how much you need to charge, how many patients you need to see per week to pay the bills, and how to budget.

Now, to be clear, if you want to charge less for patients, then seeing multiple people an hour, often in an open-concept room, will be necessary. It is doable, but I caution to not compromise care with this model, as it often involves seeing up to 12 patients an hour. You must ask yourself, am I truly giving the patient everything Chinese Medicine has to offer with this model, or is the patient actually getting less care in exchange for paying less? If you feel that you are, then the community sliding scale model may be great for you. Just prepare yourself to see a high volume of patients, which is great to gain experience, but can lead to burnout unless you hire people and work efficiently. Either way, this practice model also requires good financial sense.

HAVE A CLEAR UNDERSTANDING OF YOUR FINANCES

The main point of this section is you absolutely must have a clear understanding of your finances. Financial literacy – understanding budgeting, spending plans, knowing your expenses inside and out, allocating money, and being in control of your finances, is critical.



Basic financial literacy and organization does not come naturally to most people. It's something super important that we should learn from a young age, yet no one really teaches it to us (because most of our elders and teachers don't know it either). Understandably, many small business owners put a lot of their focus toward marketing and getting patients in the door, especially when they are first starting out. In addition, there is a fair amount of emphasis on creating multiple streams of income and offering treatment plans/packages to increase patient compliance while creating more stable and predictable financial collections for your clinic.

In our field there are lots of courses, seminars, and mentors out there that will teach you how to increase your collections, but very few that teach you how to manage that money once it comes in. On its own, making a lot of money will not lead to a sustainable and profitable clinic. If you don't know exactly what's coming in and what's going out, you will invariably start to feel like you're running in place no matter how hard you are working.

Understanding your finances and telling your money where to go is essential for being able to pay yourself, grow your clinic, hire employees or contractors, pay your bills on time, plan for your tax liability, plan for emergencies, and so on. And the most effective way to do that is to keep a zero-based budget. Zero-based budgeting is assigning every dollar that comes in with a job before the month starts. It ensures you're never caught with your pants down. And it is the KEY to winning with money.



Rebecca Ong,

L.Ac. financial educator for Acupuncturists and founder of the Dollars & Sense Facebook group

Financial literacy is a must when running your practice. Without financial literacy, you will never achieve the best practice possible, will always work harder than you have to, and will always be subjected to financial stress and unwanted surprises. And you can never out-earn poor financial literacy.

Key takeaways for Financial Health with Practicing:

- Financial literacy is an inseparable part of a successful practice
- You must know your finances before setting your rates
- You need to be objective when it comes to the business side of your practice
- You can't out earn poor spending habits
- Getting control of your finances will improve your relationship with money

DO PURSUE CONTINUING EDUCATION: YOU DID NOT GET WHAT YOU NEED IN SCHOOL!

When I graduated and became licensed in New York State, I was not required to have an NCCAOM diplomate, and New York State did not require any continuing education. Don't get me wrong, being a new graduate with no money, I welcomed this at first. But as time went on, and now that I see the deficiencies in this profession, it is unacceptable to not require licensed professionals to prove they are at least minimally competent. Looking back, it is amazing that New York State does NOT require Chinese Medicine practitioners to have any continuing education, especially since every profession requires some type of continuing education to maintain a professional license, including realtors, barbers, lawyers, and almost every person who holds a professional license.

Another reason I welcomed not being required to take continuing education is that I had taken three seminars prior to graduation and a professional license.

Another reason I welcomed not being required to take continuing education is that I had taken three seminars prior to graduation and was not impressed with any of them. Of course, it is subjective to write that, but my sentiments are shared by thousands of practitioners the world over when it comes to the quality of continuing education in this field. There are many seminars and webinars that are just not applicable to real world practice, are only theoretical (and not the kind of theory that is applicable either), and a lot of it is just not relevant to Acupuncture and Chinese Medicine. This is true whether they have CEUs/PDAs or not.

Speaking of which, continuing education should not be judged solely on the basis of whether or not the course has CEUs or PDAs. Regardless of whether or

not a class has CEUs or PDAs, practitioners should be pursuing independent study or some kind of continuing education.

I learned, and was able to successfully apply Dr. Tan's 1,2,3 distal acupuncture just by reading his book. Often though, taking formal classes is a much more organized and comprehensive way of getting the information, which can make it easier to learn and apply in the clinic.

Overall, there is an incredible amount of continuing education out there, now more than ever, but the most

applicable kind is still not always obvious. I can certainly say with total confidence that there is exceptional continuing education out there, and not just with what my company or Legacy has to offer. There are amazing practitioners teaching all over, and many of them offer real world, applicable content that you can put to use right away.

One last note, do not skimp on continuing education. Recently I came across a post on one of the Facebook groups, in which the person asked about free continuing education. When someone replied with an answer, he then asked if he had to watch the videos. This is an embarrassment to our profession and a sad reflection on how many practitioners view continuing education. Can you imagine if a patient knew that their acupuncturist had this view? It is

far too often that I see practitioners looking for free or the cheapest classes out there, and this to me should not be the priority. Obtaining skills that will help you in your business and clinic should be of the utmost priority, not price. When you prioritize content over price, you will find seminars and webinars throughout all the price ranges that are available, and will end up with information that will make you a better practitioner.

Key Takeaways for Continuous Improvement

- Continuing Education is Critical
- Focus on education that is immediately applicable in a real-world practice
- Go beyond CEUs or PDAs with independent study
- Avoid choosing continuing education because it is free, cheap, or easy

DO NOT DABBLE IN CLINICAL SKILLS

A huge waste of time and money in the acupuncture field is practitioners taking continuing education and never actually using it in the clinic.

Lack of results in the clinic after learning a technique are often exacerbated by one of the following:

- Lack of discipline when applying new skills; not giving themselves enough time to apply it properly and often enough
- Returning to what is familiar, even if it does not produce results
- Too many continuing education options that have nothing to do with Acupuncture or Chinese Medicine, or are simply not effective in clinical application

All of the above lead to dabbling – Trying a little of this and a little of that without actually learning the information with enough depth and not applying it in the clinic often enough to become truly competent. This is something that most practitioners have experienced at some point in their careers.

Another reason for dabbling includes feeling pressured during stressful times. When clinics are slow and schedules become empty, desperate practitioners will look for anything to give them some clinical results. It is also driven by practitioners simply not being discerning enough when it comes to choosing what continuing education will best serve them and their patients. But that is not necessarily

their fault. After all, we do not know what we do not know, and the continuing education field is saturated with subpar courses.

It must be noted before I continue, there is a place for most continuing education. Some education is more scholarly in nature for example, and that is great. But what I am specifically talking about here is education that is clear, concise, thorough, and clinically applicable which will lead to more patients and better financial security. Continuing education must be clinically applicable and produce results, especially for a practitioner who has student loans, bills and overhead to pay, and needs results right now. And that type of continuing education does exist.

“IF YOU CAN’T EXPLAIN IT SIMPLY, YOU DON’T UNDERSTAND IT WELL ENOUGH.” – ALBERT EINSTEIN

Education need not be overly convoluted, claim to contain “secrets”, or be confusing. It will require hard work and dedication from the practitioner in applying what is learned in the clinic, but chances are, if it is being presented in a way that is too complicated, it will not be useful for practical purposes and may not have much clinical relevance. Look for instructors who present the information in a clear, concise matter and, depending on the topic, are currently practicing and/or have several years of practice under their belt.

I can attest to this in my own experience having worked with many instructors over the past five years and seeing for myself what works. For some of the best continuing education resources, please see the references page at the end of this book.

Whatever education you choose, you must be disciplined enough to apply it, and be ready to challenge yourself in the clinic. When I studied distal acupuncture, trigger points, and motor points, I had to make myself rely on the techniques and not regress back to what was more familiar, even if it was inferior in producing results. That is a very common mistake practitioners make in this field. They learn a little of something, try it in a limited way, but never apply it in its entirety. For example, you can learn distal acupuncture, but if system 1 or 2 “doesn’t work” and you regress back to doing a TCM or local

treatment, you (and more importantly your patients) will never get to experience the amazing benefits of distal acupuncture. Or, if you learn motor points but do not learn the system of assessment, intake, and diagnosis that help you determine when and how to use them, you will waste time needling too many motor points and at best your results will never be consistent. At worst you will make the patient’s pain worse. This behavior with applying new clinical skills, regressing, dropping the new skills, and then taking another course in something else is called “dabbling”, and it does nothing but waste a practitioner’s time and money.

To help prevent dabbling, stay disciplined and join a community of practitioners who are also learning the techniques that you are. Communities are available as Facebook groups, such as the Facebook group Lockdown & Learn and the community on DrAnthonyLombardi.locals.com (also listed in the ‘resources’ section at the end of this book), where free and paid content is available, and practitioners can post questions and case studies. Websites such as Legacy Acupuncture Supply also offer high quality free and paid webinars, as well as live classes, and are affiliated with other educators as well. Keep in mind though, when it comes to Facebook, some groups have very little organized content of any value, so be discerning with which groups you join.

DO NOT WORK OUT OF ONE ROOM AND DO SEE MULTIPLE PATIENTS AN HOUR

Having done this myself, I cringe when I see practitioners do this. Many practitioners, being graduates of schools with clinical rotations that did not at all prepare them for real world practice, often lack confidence and knowledge about patient management. They (and I include myself early on in my career) say, "Well, I will start here and see where it goes" (terrible dialogue to have going on in your head anyway), or "When I get busier, I will get another space, or add on a room".

The clinic in school is NOT reality. The great majority of time, there is no need, nor is it economically viable, to see one patient every hour or hour and a half. It is damn near impossible to get "busy" when you are limited to one patient an hour, and it is the most inefficient way to practice. Practicing this way results in wasted time, stunted growth as a practitioner, burnout, and, unless you are charging \$200 or more a visit, drastically limited income.

The Elements of an Ideal Clinic:

- Multiple treatment areas either an open concept or separate rooms
- Ability to treat patients on tables or in chairs
- Good flow from waiting area through to treatment areas
- Fully stocked supplies and disposal station at each treatment area
- Snack and refreshment stand

How will you ever know how to better manage your time if you only have one treatment room? It will not force you to work more efficiently. Also, more time with the patient does not equal better outcomes. Another way to put it is, patient care does not need to be compromised when seeing multiple patients an hour. This I can say with the utmost confidence through my experience. As I spent less time with patients (going from one room to three and then

four rooms, and then an open concept with four chairs and 3 private rooms) patients respected my time better, my confidence grew, my patients were happier, and my clinical results were the best they ever were. How did I get there? I got an office that had multiple rooms, and I jumped right in. I used timers for a while to keep me, well, on time and I forced myself to figure it out. If you are not willing to get a little uncomfortable, you will never get better.

DO NOT SPEND AN EXCESSIVE AMOUNT OF TIME WITH EACH PATIENT

There are many reasons practitioners spend too much time with patients, including working out of one room, poor time management from inefficient intakes and excessive questioning, prior work history (for example, massage therapists who become acupuncturists often struggle with this), poor relationships with money, and the prac-

itioner equating time with quality of treatment. Spending too much time ends up interfering with the practitioner's personal life, including late nights in the clinic and less time home with family, more energy expended on each patient than is necessary, burnout, and seemingly ironic, poorer patient outcomes.

Key Takeaways:

- Practitioners are not paid by the hour. They are paid for their knowledge and skills.
- Practitioners must not conflate time spent with the value of their treatments
- Learn to practice more efficiently or face burnout and limited potential in growing your practice

Patients and practitioners alike should never equate time spent in the treatment room with the quality of their treatment/care. Unfortunately, this is exactly what happens, and the practitioner is the reason why. It starts with practitioners believing that they need to spend a lot of time with the patient, and then this belief is transferred to the patient, and patient expectations are thus created as a result. Practitioners are not paid by the hour! You, the practitioner, are paid for your knowledge and skills.

In addition to the reasons for spending too much time with patients listed above, another strange phenomenon that I have seen is practitioners believing that this profession needs to "right the wrongs" of Western Medicine. After all, the biggest attribute of being an "alternative" medicine practitioner is to manage patients in ways that run contrary to how patients are treated in many Western medicine offices, right? And many Chinese Medicine practitioners get into this profession to offer patients a better treatment and better care than conventional/Western medicine. And what is one major complaint with the

standard Western medicine practice model? It is the lack of time spent with patients. Therefore, if a practitioner is in this field to stand in contrast to Western medicine in every way and provide more "caring" and "attention", this too must be part of that stark contrast. Therefore, we need to spend more time with the patient.

Of course, when put into words it seems a bit silly, right? After all, the reality is that lack of time spent with the patient, while concerning and a major problem in Western medicine clinics, is not the reason why patients are coming to see you. They are coming to you to get better. Period. And spending more time with patients, while it often occurs in our treatments, is not always necessary, especially to the extent that many practitioners take it. Time needed with a patient really depends on other factors - what the patient is coming in for, for example. But just expecting patients need you to spend more time with them should not be a blanket approach. Having an arbitrary belief that you need to spend more time with all patients is really a terrible way to practice.

PATIENTS PREFER BETTER RESULTS IN LESS TIME

In my experience, patients actually prefer to get the best results they can in the least amount of time. Even though you love your treatment space, and heck maybe it is really nice, most patients do not want to spend so much time in your clinic. They have things to do and don't want to spend an hour, hour and half, or even two hours getting treatment when they have other errands to run, kids to pick up, and plenty of other things to do.

Key Takeaways:

- Spending MORE time with a patient does not equal better treatment outcomes
- Spending LESS time with a patient does NOT need to compromise care

Finally, one of the more humorous comments and posts I read in the different forums (funny too because I have been there), is when a practitioner changes the amount of time they spend with their patients. Their new patients do not complain at all, but their existing patients with whom they have set the time expectation with, then feel they are getting less of a treatment. Even if they are getting the same or better results with shorter appointments.

DO SCHEDULE PATIENTS CLOSE TOGETHER REGARDLESS OF AVAILABILITY

A huge pet peeve of mine is wasting time. And there are plenty of ways to waste time with practicing Acupuncture and Chinese Medicine.

Acupuncturists at all stages in their careers can have this problem, and it goes along with other time management issues such as taking too long with patients, working out of one room, and not seeing multiple patients an hour.

Scheduling can be especially difficult for the new practitioner and the struggling practitioner who needs the patient more than the patient needs them. Despair in not having enough patients is often the cause for not setting boundaries, including when you see patients, how your day is structured, and how long your day is.

Regardless of how many patients you have on your schedule, I highly recommend not scheduling them on opposite ends of the day. If you have three patients in a day, do not put one of them in the morning, one mid-day, and one in the afternoon. If you have another day of the week in which patients are already scheduled for the afternoon, put that afternoon patient on that day, and repeat until that afternoon on one day is full. Although it may seem worrisome that the patient will not schedule an appointment because you didn't give them their first preference, the reality is that more often than not they will. And if having to choose a day that works for you is the reason the patient ends up not coming in, then you have to question whether or not that patient was actually dedicated enough to be your patient. You may have actually saved yourself a lot of wasted time and energy from a non-committed patient.

Scheduling DOs

- Set aside blocks of time and days for patient appointments
- Fill patient blocks completely before opening other time blocks
- Limit the length of your day in the clinic
- Provide patients with one or more appointment choices based on your established time blocks

Scheduling DON'Ts

- Avoid booking patients at opposite ends of the day
- Avoid interspersing patients throughout the day and week
- Don't worry about not giving a patient their first appointment choice
- Avoid making trips to the clinic for just one patient appointment

In summary, fill a particular time of day first, and if at all possible, do not make a special trip to your office for one patient. You can intentionally restrict your hours on certain days to accomplish this, and it will result in you filling up a morning or afternoon shift and therefore practicing more efficiently.

And yes, this seems counterintuitive and very threatening to a practitioner who already is worried about turning down a patient. However, I can attest based on my experience that it works out in the end.

DO WORK FEWER DAYS A WEEK SEEING MORE PATIENTS ON EACH DAY

Many practitioners, out of a sense of scarcity or desperation, think they need to be available every second of every day, and five, six or seven days a week, lest they might miss out on potential patients. This is simply not true, and what ends up happening is they spend long days at the office (sometimes

waiting between patients) and are in the office too many days a week, sacrificing their own personal health and quality of life. This of course is not sustainable and leads to exhaustion and burnout. While some people thrive from working in this way, many don't.

Effective uses for your time away from the clinic

- Independent research
- Online and in-person courses
- Accounting
- Marketing
- Non-practice related sources of income
- Personal interests
- Exercise
- Rest

I have heard time and again that during the lockdowns and restricted days/hours practitioners were able to work during the COVID-19 pandemic, in many cases practitioners actually ended up seeing as many or even more patients and were in the office less. Others just saw fewer patients. Needless to say, in both cases, they enjoyed their rest and new free time.

Time for yourself is essential for your mental and physical well-being, and also a time to work on other projects in and out of their clinic. During COVID, many practitioners took the time to diversify their income, for example, adding retail and online sales. Finding other sources of income, even more passive streams, is a smart business move to

make. And seeing many patients sometimes prevents a practitioner from seeing the forest for the trees. Other practitioners enjoyed just seeing fewer patients and cut expenses and learned about budgeting and financial literacy to live a simpler and happier life.

If you are not happy or are tired all the time, know that it is not necessary to work so much. You may need to work more efficiently when you are in the office (scheduling better, seeing more patients an hour and working fewer hours a day, etc.), may have to set boundaries, and may need to change your spending habits, but there is a way to do it and you must to it – for your own health.

DO HIRE SOMEONE SOONER RATHER THAN LATER

I love watching shows such as Profit, Kitchen Nightmares, and Bar Rescue. Business is business, and much of the common causes of failing businesses in one industry also apply to another.

One common theme is a business owner doing ALL the work, including “busy” work that does not actually have anything to do with bringing in money or growing the business.

The most common excuses for not hiring support:

- I can't trust anyone to do the work; they'll screw it up
- I once hired someone and they didn't work out
- It costs too much!
- It isn't a big deal for me to do these things; I like doing them

What these excuses can mean...

- I don't want to, or am afraid to face the challenges ahead of me
- I'd rather hide and do the easy work that doesn't involve me getting out of my comfort zone
- I'm acting like I work hard, but I am actually not working smart
- I can't afford it

The truth is marketing and office management are not as sexy as clinical skills. We will come up with every excuse in the book to avoid it, but being an entrepreneur means that in the end, it comes down to you. It is your fault if you fail. That is a tough pill to swallow.

When I had employees, it was the best business decision I ever made. Particularly with my last employee who worked in my clinic when I was the busiest. I have to admit, I did luck out. She had business smarts second to none, and while she didn't have

any experience in a healthcare office, that didn't matter one bit. It really was incredible how many more patients I was able to see in a shorter amount of time and still work less.

Returning to the hang-ups that practitioners have, one common belief is that they can't afford an employee. However, I can attest that this is not true. Some common concerns are: An employee will want full time, insurance and payroll will be too much, and training is too difficult.

EXPLORE ALL YOUR HIRING OPTIONS BEFORE YOU SAY NO TO HIRING HELP

First, not everyone is looking for full time employment. I had a ton of retired patients who would have worked for me. These are retired professionals who worked their entire lives and were looking for something to do so they didn't get bored. People at retirement (which is not necessarily 65 years old – many retire much earlier) often want to stay busy and keep using their mind. I had three employees and not one was ever full time. Even younger moms like to get a break from taking care of their kids or have more time when their kids go to school.

Why is part time ok? For me, I only needed help on busy shifts, and on the busier days. I wanted a specific kind of help – making the clinic run smoother so I could see more patients in a shift in less time. Rooms were cleaned and stocked. Patients were checked out and rescheduled. Those patients who don't take social cues, hang around and talk too

much – potential time killers - were also distracted and shuffled politely out the door. It was heaven and I was able to see more patients in less time. All this and I only had to pay for a part time employee.

Another worry is the cost of payroll and insurance. Insurance requirements and costs depend on what State you live in, but even so, I live in one of the most regulated and expensive States, and it still wasn't all that expensive. Workers compensation in this industry is relatively inexpensive – I think I paid approximately \$650/year. Disability insurance was approximately \$100 a year. Payroll services were \$50 a pay period, and the payroll company handled all the tax filings. Although I didn't use this at the time, payroll companies now offer Human Resources services, including helping you create an employee handbook. It really has come a long way for small business owners.

Question:
What do the great majority of busy clinics have in common?

Answer:
Employees

If you think you can't afford an employee, I recommend you take a look at your clinic and think how much MORE you will be able to do if you did have one. How many more patients would you be able to see? How much more time would you have to spend on marketing, making calls, contacting those patients who dropped off your schedule, and so on? Your employee can also help with these tasks as well. The point is, an employee actually makes you more money, while freeing up an even more important commodity – time. Look at all the busy clinics. What do they have in common? Employees.

There are many great resources and practitioners with far more experience than I have on this topic. If you do hire a mentor or coach, find one that can assist you with this particular part of practice management. Hiring need not be intimidating or overwhelming.

DO SET BOUNDARIES

Much of the wasted time, burnout, and overall cynicism experienced with practicing has to do with us, the practitioners. Practitioners oftentimes do not set boundaries with patients. Much of what has been written so far can be avoided or fixed by setting boundaries.

Setting boundaries can include:

- Not taking on patients you are not comfortable seeing
- Referring or discharging patients who chronically show up late and violate your cancellation policy
- Dropping patients who sabotage their treatments by not taking your advice, continue an activity that is clearly exacerbating their condition, etc.
- Working long days in the clinic; taking on too many patients, trying to accommodate everyone's schedules
- Not letting patients use up your time talking and not leaving your clinic

Setting boundaries also means keeping ourselves in line to adhere to them. After all, at the end of the day we have no one to blame for not setting boundaries or following them but ourselves. While some boundaries have nuance and take time and experience to learn, others are much more obvious and can be implemented right away.

One boundary that should be set right away involves how to handle patients who frequently show up late, cancel their appointments last minute, or no show. If patients constantly show up late, you have the right to refuse to see them. Of course we're not talking five minutes late. I mean the patients who repeatedly show up 10 or more minutes late. These patients screw up your workflow and it is unfair to the other patients who then have to wait. Refusing to see these patients is one solution to this problem. With refusing to see a patient, two things can happen - the patient will then respect their appointment time, or they won't come back. Either way, it's a win for you. For patients who always cancel their appointment last minute or no-show, you should really consider discharging them from your care. That is just a blatant disrespect of your time and office rules.

Speaking of which, do you have written rules/policies for your clinic? The best way to set boundaries is to start with setting rules and expectations right from the start. The patient should sign paperwork during their initial visit and you should go over those rules with them. How much you want to say and how you say it is up to you, but it should be done. If you don't have policies in place, you have not set any expectations of what you expect from the patient. This leads to two problems. One, you are more vulnerable to a patient violating your clinic rules and two, the patient will be shocked when you try to explain the violations of a policy they were never informed of to begin with.

A patient that makes you feel uncomfortable personally or professionally can mean several things, from a patient that requires treatment you are not comfortable in providing (due to high risk areas or unfamiliarity or inexperienced in treating their condition) to a creepy patient who says inappropriate things or whose behavior is inappropriate, or a patient who otherwise gives off red flags indicating they will be a problem in some way. They all make us feel uncomfortable in some way.

WATCH FOR (AND HEED) RED FLAGS

I had several experiences of being uncomfortable with a patient. One example was when I had a patient who came in for her initial visit with her son. She was around 70 years old. Both her and her son appeared very guarded. During the interview, her son often tried to answer questions for her. She proceeded to tell me how the chiropractor and physical therapist hurt her, causing rib and back injuries including vertebral fractures of the thoracic spine. The red flags were flying everywhere. I politely suggested that acupuncture did not appear to be a viable option for them at this time and that they do not pursue it. There was actually a feeling of relief from both of them. While patients are sometimes injured by other practitioners, it is not common. And while I don't think there was malintent and I don't think they were necessarily looking to sue a practitioner - there was an overall distrust and willingness to blame other practitioners for her problems, and this was something I was not willing to even entertain. Had I been desperate for a patient I may not have caught this or would have ignored the red flags.

Being uncomfortable with a patient can have far worse implications though and includes dealing

with patients who are inappropriate or abusive. I have heard from and have seen many posts from numerous female practitioners who had perverted male patients who acted inappropriately towards them in the clinic. While it is not always obvious that these patients will behave like this, many of these practitioners have said in hindsight that there was some kind of red flag that they missed or ignored. Let's be clear - This is NOT because of willful ignorance on the part of the practitioner. Rather, practitioners first and foremost want to help their patients, and this can cloud their ability to see red flags up front. Oftentimes people with nefarious intentions take advantage of practitioners and they do not make their intentions obvious prior to displaying their inappropriate behavior. My point with all of this is to implore you, the practitioner, to never feel like you have to take on a patient or to ever let this behavior slide. If your gut instinct is telling you something, you are better off listening to that and just declining to take on that person as a patient from the get-go. And while it happens with mostly female practitioners and male patients, I have personally seen it happen with male practitioners and female patients.

PRACTITIONERS HAVE THE ABILITY AND RIGHT TO DISCHARGE A PATIENT FROM CARE FOR ANY REASON

In addition to the reasons mentioned above, another reason that boundaries may be overlooked and not enforced is that new practitioners simply do not have the experience and were not educated about this. Being under the guide and protection of the school clinic is one thing but running your own practice and being able to take on this new responsibility is a whole other animal. Also, boundaries can be lax if the practitioner is struggling, in need of more patients on their schedule, or overworked and distracted with running every aspect of their business and are overwhelmed. Unfortunately, setting boundaries for the above scenarios becomes much clearer after something happens. However, I hope that this section can bring light to this topic and help a practitioner secure more boundaries from the beginning. Practitioners must also understand that they have the ability and right to discharge a patient from care for any reason they deem legitimate and should document it clearly in the patient's chart. And while having a policy in place to guide you and the patient is good, it can't cover every possible scenario you may face. Sometimes the practitioner will have to make these judgement calls on the fly.

Since much of setting boundaries was also covered in other sections, the last part of this chapter will cover those relentless, talkative patients who can take up a lot of your time. This often happens with new practitioners who run only one room at a time and/or do not have front desk help. These patients can be exhausting and seemingly never get enough of your time. They don't get social cues and will continue talking even if there are other patients in the waiting room.

In our profession, we are so entrenched with the belief that patients need to be heard, that we feel bad if we cut them off, or we feel that it is a very important part of their treatment to let them vent (depending on what they are coming in for, it may be necessary. But I am talking about every visit). Or, when starting to practice, we may have more time and spend a lot of time just talking. Whatever the reason, you have just set a terrible expectation to the patient that you have all the time in the world. And if you have the gift of gab, you may want to suppress that gift or it will become a nightmare.

This however can be easily averted by scheduling patients close together, not having down time, and having an employee, to name a few.

CHAPTER 3: WHY NOT WORK FOR SOMEONE INSTEAD?

A new graduate might now be at the point of thinking, “My god, why the heck would I want to go into private practice?”. Well, I agree. That is a totally reasonable question, and one that I should have asked myself years ago! And for many practitioners, there often comes a time when they wonder if they want to keep practicing. Running your own business, especially after struggling, is a major pain in the butt. Whether you are fresh out of school, are hesitant to go into business for yourself, or have been practicing and are just tired of it, finding someone to work for may be preferable.

Although historically opportunities have been limited, there are many more today. It may depend on where you are geographically – small towns may not have opportunities (though this is NOT always the case), while larger cities may have VAs or larger clinics that are hiring. But some of these positions at the DOD, VA, and within larger clinics are a huge opportunity to get experience and many pay very well. I have seen people put their nose up to some of these positions that paid “only” \$60,000/year plus health benefits, which is baffling to me considering how hard it is for many practitioners to even gross that in their private practices. In any event, it ultimately comes down to perceived benefits and where one is in life.

Working for someone else offers many benefits at the beginning and end of your practicing career.

One thing I will say about expectations of salaries when working for someone else: Don't think you're worth so much just because you spent \$100k or more on school, have a license, and have bills to pay. I have owned several businesses, run my own clinics, and spoken with many practitioners who own large clinics. It is not easy to pay you what you think you are worth. When working for someone, sometimes the base salary is supplemented with bonus incentives, so you do get paid for your performance as you get more experience, and that has worked out extremely well for both clinic owner and practitioner.

Basically, working for someone else in a private clinic or for the government can be a very good alternative to having your own private practice - for your sanity, a better quality of life, and more secure finances. There is no need to have your own clinic, particularly right after graduating. Many also look to work for a clinic as they near retirement.

As mentioned above, look for these opportunities at larger acupuncture and multidisciplinary clinics, fertility clinics, the Veterans Administration (VA), the DOD, and others. Modern Acupuncture, the first franchised clinics in the U.S., offers positions as well, and you can learn distal acupuncture techniques that are highly effective while also getting experience seeing multiple patients an hour.

SUMMARY

The above covers some of the things you should do and should not do in private practice. It is not intended to be a complete list, nor address the many nuances of practicing. However, I think that if you start with the Do's and Don'ts in this book, you can make significant changes to your practice and life. I believe these are the big ones.

The resources below can offer opportunities to learn more about the different topics discussed in this book. It is my hope that you, the reader, do not give up and truly know that this profession can provide you with many satisfying and fulfilling years helping patients whose lives can be positively impacted with this medicine. And that you can live a financially secure life in private practice.

Well Sourced, Well Made, Needles, Complimentary Products and Professional Development for All Disciplines



All-purpose
Needles



Complimentary
Products



Professional
Development

For Practitioners by Practitioners

As practitioners, we understand the tools you use in your practice - needles and training. Because of this, we've improved both to help you be a better practitioner.

We use our deep cross-disciplinary clinical experience to carefully source the best needles, complimentary products, and professional development, and have partnered

with manufacturers and instructors to design and build them to our specifications.

For practitioners, that means you now have access to better training, better tools, and better techniques resulting in superior clinical outcomes and more successful practices.

Additional Resources

Legacy Acupuncture Supply
Needles, Supplies, and Acupuncture Education
Legacyacusupply.com

Dr. Anthony Lombardi
EXSTORE, Motor Points, Electro-Acupuncture Webinars & Seminars
facebook.com/groups/lockdownandlearn
Subscription community: dranthonylombardi.locals.com
acuvids.com

TCM Hub, LLC
Chinese Herbal Medicine & Business On-line Courses, Webinars, & Seminars
TCMHubEducation.com
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Subscription community: tcmhub.locals.com

Rebecca Ong, L.Ac.
Financial Education for Practitioners
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A Legacy Acupuncture Supply Practice Resource

Helping you improve your techniques, knowledge, and clinical outcomes