



THE BUSINESS OF CREATING HEALTH

Master the Practice.
Optimize the Care.

JOINT PROVIDERS:
THE FOUNDATION FOR CARE MANAGEMENT
& WORLDLINK MEDICAL

COURSE BROCHURE

2020

CREDITS:
18 AMA PRA Category 1 Credits™



**ACADEMY OF PREVENTIVE
& INNOVATIVE MEDICINE**
by worldlink medical

The Business Of Creating Health

With dramatic paradigm shifts in a changing healthcare environment, providers dedicated to giving the best possible care to patients are finding that despite their best efforts they are hindered by insurance companies, revenue concerns and restraints to care that ultimately lead to what many call “burn-out”. As if this isn't enough, COVID-19 is making it difficult to see and connect with patients. For many, maintaining revenue is an increasing challenge.

The Business of Creating Health is an accredited CME business course that will change the way you practice medicine. This course is designed for medical providers and staff looking to transition practices, change their current business model or start a new practice. As an attendee you will get the tools and autonomy to give patients the care they deserve in the type of clinic you are capable of creating and in an environment safe for your patients.

Course Description

You can't practice medicine successfully if you can't navigate what we call the Business side of Creating Health for you and your patients. Get the most up-to-date information and tools based on current research, healthcare paradigm shifts and standards of care that will keep you practicing medicine in a transformative way for patients that makes business sense for you.

The Business of Creating Health is an interactive hands-on course designed to navigate and create the most effective business practice models for ALL types of medical providers and ALL types of practices. Think of this as a “mini business residency program” in practice start up, practice transitions and practice growth. With an agenda consisting of distinguished presenters, attendees will learn how to maximize success and satisfaction in their clinical practice through tricks and tactics in areas of brand messaging and marketing, business operations, medical legal and personal and professional considerations.

This is the biggest and best CME Business Course available to medical providers and staff guaranteed to teach you more about running a successful clinic than you can learn from anywhere else. By the time the weekend is over attendees will have experienced and created a variety of business models and practice scenarios. You will depart with new ideas, tools, resources and most importantly an actual plan to implement. Learn by doing, leave with a plan.



1. Brand Messaging & Marketing

We like to believe that once you open your doors patients will come, but often there needs to be a little push. We brought in marketing experts to

help you promote your authentic message through website design, marketing in the digital world and an easy to build and implement 1-page marketing plan.



2. Business Operations

Business start-up, growth and/or practice transition is never an easy endeavor especially while trying

to practice medicine. Hear from some of the best business consultants and experts to make sure you're in the know for best business practices. These include examining different business models, accounting and financial concerns, physical environments and elements, overall clinic culture, practice transitions and setting the foundation for a successful practice.



3. Medical Legal

There are many obstacles to consider when picking a business model that works best for your type of practice. Whatever you choose we

want you to set it up in a legal framework that protects you and your practice. Explore the important ins/outs of contracts, consents, plan participation and medicare, private direct medicine models and more.



4. Personal & Professional Considerations

Physician “burnout” is at an all time high. But is it really “burnout” or something more? We will consider the current state of sick care vs. healthcare through examining different practice models, roadblocks that are stopping you from accelerating your practice, and the “physician freedom formula”. It is time you not only become the expert in your community, but re-ignite the passion for the work you've devoted your life to.



Course Objectives

1. Evaluate and analyze trends in private direct pay models with ongoing reforms.
2. Outline various alternative approaches to private direct practice structures, focusing on integrative models.
3. Identify legal compliance challenges and solutions.
4. Analyze different practice models and identify a best fit for your needs based on your particular practice.
5. Identify and discuss the importance of a business plan, mission, vision and story.
6. Examine basic business elements related to accounting and finance.
7. Discuss pros and cons of various physical elements of your practice from location, size, décor, signage and operational tools.
8. Describe and discuss the importance of your team to your overall success.
9. Review websites and understand their importance in messaging, form and function.
10. Debate the importance of being an expert in your community, what does it take?
11. Use practice case studies to refine your own practice model.
12. Examine how a 1-page marketing plan can have an exponential effect on your practice.
13. Review and create a 1-page strategic plan to move your practice forward.

Agenda

FRIDAY

7:00 – 8:00 AM

Registration

8:00 – 8:15 AM

Welcome and Introduction

- Current State of sick care vs healthcare and why you should care
- New Options for healthcare, perhaps a new model is needed
- 5 key reasons why physicians are looking for something different

8:15 – 9:15 AM

How to Destroy the 9 Roadblocks Stopping you from Accelerating your Practice

- Mindset Roadblocks
- Management Roadblocks
- Marketing Roadblocks

Speakers: Malaika Woods, MD, MPH and Tamika Henry, MD, MBA

9:15 – 9:30 AM

Audience discussion Q and A

9:30 – 10:30 AM

Setting the Foundation for a Successful Practice

- The \$64K question: what do you really want out of your professional life, what do you want to do and accomplish clinically and professionally
- Develop/Refine your unique essential business statements, and your story
- Philosophy, Mission, Values and Vision
- Manifesto / Business Plan

Speaker: Gregory Petersburg, DO

10:30 – 11:00 AM

Group Discussion, Q and A

11:00 – 12:00 PM

Basic Private Direct Practice Model Compliance Solutions: Navigating Medicare, Medicaid & State Laws:

- Describe the basic private fee healthcare compliance challenges and solutions
- Identify existing versions of private direct medicine in the US
- Provide an understanding of how cash healthcare works in the US

The goal is to review various compliance options and models use to lawfully engage in cash healthcare practice in the US

Speaker: Jim Eischen, JD

12:00 – 1:00 PM

Lunch

1:00 – 2:00 PM

Plan Integration Options: Expanded Medicare telehealth coverage & Impacts on Private Direct Practice Models

- Expansion of Medicare reimbursement for virtual care/telehealth

- Options to integrate Telehealth plan reimbursement or stay outside plan integration
- Outline the benefits and challenge of various plan integration options

Speaker: Jim Eischen, JD

2:00 – 2:45 PM

Practical Application and Real-World Approach to the Formation of a Business/Clinical Practice

Speakers: Greg Petersburg, DO

2:45 – 3:30 PM

A Discussion of Legal Business Elements Vital to Your Practice

- Private Patient Fees
- Patient Agreements
- Consent Forms
- HSA/FSA/HRA Eligibility

Speaker: Jim Eischen, JD

3:30 - 3:45

Break

3:45 – 4:45 PM

Live Audience Case Scenarios – (3) 20 minute Quick Consults on Model Options and Business Formation Process

Speaker: Jim Eischen, JD

4:45 – 5:30 PM

Business Elements Accounting and Finance

- Budgeting / Financial Reports
- Estimating Start up
- Business models / What to charge

Speaker: Greg Petersburg, DO

SATURDAY

7:00 – 8:00AM

Registration

8:00 – 9:15 AM

The Physical Elements of Your Practice

- Finding the right location
- Own, lease, or rent
- Office functions, design, layout and flow
- Furnishings & Décor
- Image and signage
- Operational tools - clinical and Business
- Equipment, Technology
- Establishing relationships, business agreements

Speaker: Greg Petersburg, DO

9:15 – 10:30 AM

Culture Shock! The Surprising Effect Culture has on your Predictable Success

- Discover "the secret sauce" to having a bulletproof, successful practice
- Learn the tricks to developing a strong culture that nurtures employee happiness
- Explore what culture really is, how to custom define yours, how to develop a culture with your existing staff and how to keep it strong for the life of your practice

Speaker: Jody Layne

10:30 – 10:45 AM

Break

10:45 – 11:45 AM

Transitioning vs. Taking the Leap In Your Clinical Practice: Your Options

- Add new services to your existing practice
- Continue current business and open new (separate) business
- Transition from your current practice/specialty to a new practice/specialty
- Make the leap and jumpstart a new practice/specialty
- The pros and cons: Business / Clinically / Personally
- Planning and Implementation

Speaker: Greg Petersburg, DO

11:45 – 12:00 PM

Group Discussion on Audience Practice Discussion Pearls

12:00 – 1:00 PM

Lunch

1:00 – 3:15 PM

Break

3:15 – 4:15 PM

Marketing in the Digital World

- Using your website to generate and capture leads
- Website content
- Paid ads vs. Organic searches

Speaker: Lauren Dolan

4:15 – 5:15 PM

Be Known as the Expert in Your Community. Increase your impact, Have More Free Time and Get Paid What You're Worth—Even Now

- How to build authority
- The physician authority formula: 5 keys to being seen as the authority in your market
- The physician freedom formula
- Your authority action plan
- Mistakes to avoid

Speakers: Malaika Woods, MD, MPH and Tamika Henry, MD, MBA

5:15 – 5:30 PM

Audience discussion on how you have interacted with your community

SUNDAY

8:00 – 10:00 AM

Fail to Plan? Plan to Fail! How a 1-page Marketing Plan has an Exponential and Compound Effect on your Practice

- Learn how a marketing plan can double, even triple, your profits
- Discover the main tactics that make up an effective marketing plan
- Understand how to easily execute your plan
- Leave this session with your marketing plan done and ready to go

Speaker: Jody Layne

10:00 – 10:15 AM

Break

10:15 – 11:00 AM

How to Complete a One-Page Strategic Plan

Speaker: Kevin Chan, DO, MMM, FAIHM

11:00 – 11:45 AM

The Strategic Code for Healthcare Entrepreneurship - 9 Formulas for Success in healthcare Crisis Management

1. Healthcare Positioning
2. Healthcare Perspective
3. Business Opportunities
4. Realizing Limitations
5. Restricting Errors
6. Weakening Ambiguity
7. Controlling Dominance
8. Achieve Success
9. Maintain Security

Speaker: Kevin Chan, DO, MMM, FAIHM

11:45 AM – 12:00 PM

Group Discussion, Q and A

Teaching Faculty



Gregory Petersburg, DO Faculty Chairman

Dr. Gregory Petersburg is a popular international speaker, educator and consultant for physicians', medical professions and the public on lifestyle, active aging medicine, the "art" of medicine and providing unique patient experiences.

With expertise as a clinician, lifestyle coach and practice consultant to hundreds of lifestyle clinics across the country, he brings a plethora of knowledge and experience to both the human dimension of a medical practice and the business fundamentals of practice transition. He teaches the power of creating patient and practitioner experiences that create lifetime relationships for you and your patients and life-transforming change in patients' lives.



Kevin Chan, DO, MS, MMM, FAIHM

Dr. Kevin Chan is the first physician in the nation to be simultaneously board certified in both Clinical Lipidology and Integrative Medicine (a medical specialty now formally recognized by the American Board of Physician Specialties). He is also certified in Age Management Medicine, Anti-Aging & Regenerative Medicine, Canonical Chinese Medicine, Advanced Bio-identical Hormone Replacement Therapy, Occupational & Environmental Medicine, as well as Family Medicine. Dr. Chan completed his medical training at Mount Sinai School of Medicine and is also a graduate of the Northwestern Kellogg School of Management, as well as the University of Southern California Marshall School of Business. Dr. Chan practices medicine at Pineapple Health, his wellness clinic in Phoenix, AZ. He is also the author of *The Art of Health, Your Health Warrior Awakens*, and is currently completing his second book, *The Strategic Code for Healthcare Entrepreneurship*.



Lauren Dolan

Lauren is a digital marketer with 8 years of experience building marketing funnels for businesses in the health, legal, and manufacturing industries. She has built 20+ lead generating websites in her career and helped launch a variety of successful local businesses. She is currently the Digital Marketing Specialist at Worldlink Medical and the owner of Salt Lake City Notary Services, a local notary business that generates 50-100 leads per month. She studied Political Science and International Relations at Brigham Young University and is also a former collegiate women's basketball player. Her specialties include SEO, digital advertising platforms, social media advertising, lead generation, brand building and local business marketing.



Jim Eischen, JD

Jim is a California attorney with nearly 30 years of experience in business planning, healthcare, privacy, licensing, and regulatory issues (including Medicare compliance, physician compensation, and private direct fee business modeling and compliance).

His practice encompasses integrating physician healthcare models via Management Services Organization (MSO) structures, navigating the corporate practice of medicine, and related compliance issues. He advises clients in matters connected to reimbursement, contracts, interdisciplinary health professional employment and labor issues, and Health Insurance Portability and Accountability Act (HIPAA) compliance. Jim has done credentialing work for physician independent practice associations (IPAs).

Jim is a national authority on structuring consumer/patient financial contribution and reimbursement models for private/concierge medical groups and healthcare IT product developers to achieve federal legal compliance. He has worked as a consultant/founder with medical groups, electronic health record software firms, cardiovascular testing and health coaching enterprises, and venture capital groups exploring healthcare opportunities. Jim also provides preliminary guidance on practice formation options.



Tamika Henry, MD, MBA

Dr. Tamika C. Henry is a Southern California native who earned both her Bachelor of Science and Doctorate of Medicine degrees from the University of Southern California. She also earned her Masters in Business Administration from the University of California, Irvine. For the last 13 years, Dr. Henry has been practicing as a board certified family physician with emphasis in geriatric medicine at her growing practice, Unlimited Health Institute. She has also received extensive training in the areas of preventive medicine, bariatrics (non-surgical weight loss) and bio-identical hormone replacement therapy (BHRT). She is the co-author of the newly released book, *Physician Unleashed: The Physician Freedom Formula*.



Jody Layne

With a passion for people, Jody is the proud Chief Operating Officer for Florida Center for Hormones and Wellness in Orlando, FL. Prior to joining Dr. Carrozzella at FCHW in 2017, she has been a professional marketer, entrepreneur and business development consultant for over 25 years. Jody has worked with large brands like Toyota and Disney and smaller organizations like realtors and chiropractors. Under her leadership, FCHW's revenue and patient base has more than doubled. The clinic has grown from three to nine staff and in 2020 they will be bringing on another provider and opening a second location. Jody believes the biggest assets to her success have been focusing on making FCHW a great place to work, never letting up on marketing as well as providing extraordinary patient care with evidence based medicine.



Malaika Woods, MD, MPH

Dr. Woods is a double board certified practitioner with the American Board of Obesity Medicine and American Board of Obstetrics & Gynecology Institute for Functional Medicine. She is the founding director of the highly popular Woods Wellness Institute and the E3 method. She is the co-author of the highly anticipated newly released book, *Physician Unleashed: The Physician Freedom Formula*. As a native of Wichita, Kansas. She earned her Bachelor's degree, with cum laude distinction, from Wichita State University. As an undergraduate, Dr. Woods was also the recipient of the Harry S. Gore Scholarship, the largest leadership scholarship awarded in the state of Kansas. She completed her Doctorate of Medicine and Masters of Public Health degrees from the University of Kansas School of Medicine. Dr. Woods completed her residency in Obstetrics & Gynecology at the University of Missouri-Kansas City.

ACCREDITATION STATEMENTS

AMA PRA Category 1 Statement

This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education (ACCME) through the joint providership of the Foundation for Care Management (FCM) and Worldlink Medical. The Foundation for Care Management is accredited by the ACCME to provide continuing medical education for physicians.

FCM designates this educational activity for a maximum of 20 AMA PRA Category 1 Credits™.

Physicians should only claim credit commensurate with the extent of their participation in this activity.

The ACCME defines a "Commercial Interest" as any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients.

Nursing Statement

Foundation for Care Management is accredited as a provider of nursing continuing professional development by the American Nurses Credentialing Center's Commission on Accreditation.