



Kara Ware: [\(00:02\)](#)

This is Good Medicine On The Go. In season one, we talked about an entry point for providers new to nutritional genomics. And in the second season, we are re-imagining entry points, that's plural, entry points, for patients seeking functional medicine. Hello, and welcome. I am Kara Ware. I'm a national board-certified health coach and business advisor.

Nathan Morris: [\(00:44\)](#)

I'm Nathan Morris. I'm a medical doctor who is also certified in functional medicine.

Kara Ware: [\(00:47\)](#)

Today, we are talking about re-imagining entry points to make functional medicine more approachable, affordable, and sustainable with the purpose to improve patient retention and open up to a broader audience.

Kara Ware: [\(01:06\)](#)

Where we left off with season one, Nathan, you, and I were talking about and kind of laughing, the common question is, why did a patient not come back? We thought everything went well in the visit. I did everything I put in training into practice, and the patient was shaking their head in agreement, and they walked out the door. I thought, "Yes, this is going to be awesome," and they never came back.

Nathan Morris: [\(01:30\)](#)

Yeah, in my earlier days, I would think I had this amazing plan. That I nailed it, and then the patient is sitting there, nodding in agreement, and then guess what? They do not come back. Why is that? That drives me to distraction when I think about it. Kara, you and I have thought about this a lot, and really what we're doing is overwhelming the patient with all these recommendations at that first visit.

Nathan Morris: [\(01:55\)](#)

They're actually going away remembering just one or two things, maybe, if we're lucky. Because they are sitting there, they're there because they usually have a significant issue. They are having some emotional distress. And they are probably still back on square one, trying to figure out the first thing I told them about, and I'm on square 20. So, they leave, and they do not get that important information and recommendations that I've been making. So, it's a very overwhelming experience where I think I've done a really good job, and I really have not been able to communicate with that patient what I'm trying to do.

Kara Ware: [\(02:30\)](#)

Exactly. All this tells us is that those recommendations just are not yet a match to our patient's current level of readiness. Right? When we are onboarding patients, that's an entirely different point of our relationship than when we've been working with them for a while. So, at the very beginning, having clinicians match recommendations to the patient's financial and emotional level of readiness of how they are entering into your practice, entering into functional medicine, is really important to remember. If we do that, then we can dramatically improve patient retention and also reach a broader audience



because we are matching their readiness as they're entering into functional medicine, as they're entering into our practice.

Nathan Morris: [\(03:13\)](#)

Right. That is exactly what I was not aware of was that I needed to match them to that level of readiness, and what I felt where they needed to go was not where they needed to go. So, that is such a great point, Kara.

Kara Ware: [\(03:26\)](#)

So, the question we are asking is, how can functional medicine improve patient retention, since we know this is a pain point in our industry, and also how can functional medicine reach a new broader audience of patients?

Nathan Morris: [\(03:41\)](#)

I think the real solution is how do we get patients on board with just enough information to get them invested in doing the couple of things that they need to do after that first visit. Because when they feel like they must do 20 things, it just becomes, "Oh, heck with it. I am going to go my own way. Functional medicine, here, it's not a solution for me." The thing that I learned is that if a patient is ready. If they understand what I'm talking about or the reason why that I'm doing the things I'm doing, and that I meet them where their current ability is at-

Kara Ware: [\(04:18\)](#)

Yes, current ability. James Prochaska, he teaches us the Transtheoretical Model of Change. He is one of my favorite teachers. He taught me something so simple, right? It is always the simplicity of things I think that's the glue that holds everything together, is that a task must match, must be an equal match to the current ability. So, in this case, a functional medicine care plan, the task, the lifestyle, and medical recommendations must match the patient's current ability to keep the patients who are coming to functional medicine engaged, activated long enough to experience the profound results we all know functional medicine can provide.

Nathan Morris: [\(05:00\)](#)

Current ability, I think that's really... And then if I can meet them there, it may take a little bit longer, but they are going to have a much more enjoyable functional medicine journey. It creates that relationship on day one that is successful because I notice as we'll be talking about that when I can meet them where they're at, that they are nodding in true understanding. And I create a plan that is going to be followed up on so that we make sure they have heard what they need to hear, and then I've had so much more success. I think that is really the thing we're missing right now in functional medicine. We have a one size fits all. And that doesn't really work because not all patients are at the same place and the same amount of readiness.

Kara Ware: [\(05:43\)](#)

Yeah, exactly, and covering lifestyle changes and addressing medical risks all at one appointment, and



also the patient is coming in with their own emotional distress because they're not feeling well. They have been seeing a lot of specialists. Maybe they are even worse off than they were before. It is hard to remember important instructions even. And so, when they don't come back, what it's telling us is the investment financially, emotionally, and the tasks that we're asking them to do were just too much too soon.

Kara Ware: [\(06:20\)](#)

Nathan, you and I created a model that addressed this in your last practice iteration. We flipped the traditional workflow of a health coach on its head, which we will share more in this episode. But, of course, we have continued to re-imagine how to continue improving your practice, your third iteration of Good Medicine, which you have recently opened in Colorado. So we came to this conclusion of creating more entry points to your practice based on patient readiness.

Kara Ware: [\(06:50\)](#)

Functional medicine, we're offering personalized medicine, but now let's take a look at how can we offer more of a personalized onboarding process that matches the provider's instructions to the patient's readiness to their current ability. This is how we are going to set up the practitioner and patient for a successful relationship from day one. The health coach, the health coach is going to play a big role in these entry points we are going to discuss. Nathan, you had a successful functional medicine clinic when we met. So, will you tell us some benefits you've experienced after you integrated me as a health coach in your practice?

Nathan Morris: [\(07:29\)](#)

Well, really, the ultimate thing we want to take away is patient empowerment and creating a partner so that they're not looking at you as you're going to fix them. They must understand that they're going to be an active partner in this and that improves patient engagement. I mean, that's key. You have got to improve patient engagement. You have got to optimize patient outcomes. If they are not seeing results, and we're not talking about getting them a hundred percent better after the first visit, but they've got to see some outcomes so they can say, "Hey, what I'm doing, there's some positive reinforcement there."

Nathan Morris: [\(08:06\)](#)

When they start seeing this positive reinforcement, and a lot of times, for the first time in years, they're really going to increase your word of mouth marketing for you. Because all of a sudden, they're going to say, "Hey, you know what? This provider spent time with me. He understood me. I have actually started seeing these results. I'm not 100% better maybe, but I'm getting better, and I can see that I am improving." Ultimately what I've seen, is that by implementing someone to help me with this effort of the things I just mentioned, I've really bolstered the bottom line of my practice and the practice income, which is very counterintuitive to some people.

Nathan Morris: [\(08:44\)](#)

They think, "Oh, you're bringing somebody else on board. There is more expense. You're going to be decreasing your own income," but that's not the case at all. We will talk a little bit more about that.



Then, my stress just completely reduced a thousand-fold, because I did not feel like when I was walking into that visit with the patient, that I was having to be that one point of contact that had to teach them how to eat, teach them how to exercise, teach them how to arrange things financially, so they could do these things. It helped me build the practice that I loved, I mean, which was really putting that puzzle piece together and helping somebody or letting somebody help me carry the load. I think that's key, because we really need to understand that, although we can do everything sometimes, or we think we can, maybe we should be delegating some of those things. It really helped me build that practice that I always wanted.

Kara Ware: ([09:35](#))

You could really shine as a healer because a lot of that heavy lifting was done upfront with the patient and they were ready to be your partner. IFM, in one of their four tips for patients to get started, after they choose a practitioner, then the hard work starts as you and your provider become partners in this process. But what does that really mean?

Nathan Morris: ([09:58](#))

Exactly.

Kara Ware: ([10:00](#))

Are patients even ready for that? You have been having a lot of continuing education, and learning all these tools, but now we need to help the patients know their tools they're going to rely on, as they go through this process. Okay. In Season Two, you and I have evolved your dynamic practice, once again, with these new ideas that have come from years of learning, how to meet patients, where they are presently out on their journey. Based on this crucial idea of patient readiness, Nathan, you, and I have a re-imagined entry point with the purpose of making functional medicine more approachable, affordable, and sustainable. We hope you; the listeners can benefit from our years of trials and triumphs. The theme running through this season is why and how to integrate a health coach into clinical practice, to assist providers with improved patient engagement activation, right? Patient activation, in previous years we've heard of patient compliance.

Kara Ware: ([11:11](#))

Now we really want a patient to be activated in this mutual, participatory medical model. Then this, of course, an activated patient positively affects everything downstream, like optimizing clinical outcomes, because such tremendous results are being experienced, because patients are staying around long enough with you, Nathan. Then, that increases word of mouth for a practice and a practitioner. Of course, then that will bolster a practice's bottom line. Then hopefully, all of this reduces any stress the provider's carrying and reduce any risk of burnout, so we can have our practitioner stay in the functional medicine space. Most importantly, all of this helps eventually, a practitioner to build a practice that you love. This is everything we're going to talk about right after this

Kara Ware: ([12:01](#))

This podcast is sponsored by the Atrium Innovations family of professional brands, offering evidence-



based supplements, advancing scientific research and providing clinical protocols and technology to empower practitioners globally. Atrium Innovations brands include Pure Encapsulations, the number-one trusted and recommended brand by practitioners. Douglas Laboratories, Genestra Brands, and Living Matrix, the fastest growing digital patient management system for functional medicine.

Kara Ware: ([12:41](#))

I've been health coaching for 20 years now, so it's given me quite a bit of time working with patients in both the conventional setting and the functional medicine setting. In 2013, I opened an autism recovery clinic. It was a multi-faceted functional medicine-based practice. We had a several health coaches, that I had trained, and I had a naturopath at the time. I had a structural integration specialist, that did cranial sacral, and brain gym and integrating baby reflexes. We had really, this comprehensive approach to working with families, to address the underlying medical conditions that were resulting in their child's autistic behaviors.

Kara Ware: ([13:23](#))

My model was to work with the families, the parents first, because really I had to meet them with where they were at and what they were ready for, in order to implement the lifestyle changes. Nathan, that is when you and I met, was I was operating this clinic. I was a really struggling under all the financial overhead. I got in over my head, but I believed so passionately, I wanted to turn around and help others have the resources, the tools, and to meet them where they were at, so that they began to live the lifestyle that will allow their child the best success of healing, what was causing their pain.

Kara Ware: ([14:00](#))

I'll never forget the first day, when you came into Integrated Connections for us to meet, and you looked at this chalkboard that I had, that was visual, that was trying to help show parents, all the underlying factors that we want to get in and understand, so then to address the symptoms. Because back in 2013, still people had not heard of this philosophy. I loved when you looked at that board and you're like, "I want to work with you."

Nathan Morris: ([14:27](#))

[crosstalk 00:14:27]

Kara Ware: ([14:27](#))

You immediately saw the health coach and the provider's symbiotic partnership.

Nathan Morris: ([14:34](#))

Yeah. I think I had to meet you, and understand what you were doing because, I want to be honest, Kara, when I first heard what you're doing, I'm like, "What is this? How does this fit in to what I am doing? Because we knew that we needed each other, but I didn't quite understand it. Then I looked at it and I am like, "Holy crap, you're teaching all the stuff that I need to be taught to patients." Then, when we did create this symbiotic relationship, it was like shooting fish in a barrel for me. I mean, they had already done ... They understood how to eat. They understood the role that supplements would play.



They understood how to manage their finances and how the little things each day. All of a sudden I came in and I was a hero, because I was like, "Yeah, we'll do this."

Nathan Morris: [\(15:18\)](#)

I'm like, Kara did all the work and here I am. I am [inaudible 00:15:21] okay, we're going to do a couple of things medically. Then we just, we saw these amazing results, and that was when I understood it. The light bulb came on for me. I mean, it really was, because I was like, "What is this health coaching?" Because I thought it was something that existed outside of me and maybe even a threat a little bit. All of a sudden I was like, "No, this is really a tool that I got to have in my office," and so that was really awesome.

Kara Ware: [\(15:44\)](#)

Yeah. I love that. I was just so grateful, and I do think there are a lot of misconceptions about health coaches and their roles and what they do, and their scope of practice. We are going to be talking about that in this season to try to help to myth-bust. And so more coaches and doctors can see a path forward of benefiting because of the partnership and then how the patient and the practice win, when we are all working together. I then eventually, after a couple of years, came to you and asked, "Hey, Nathan, can I merge into your practice? Because I'm struggling with this overhead." I am not a provider. I am not able to make what a provider can per hour. And we all know how difficult it is financially to open and run and grow a functional medicine practice. And especially back in those earlier years where people did not even really know what the heck I was talking about. There wasn't really well-known at the time.

Kara Ware: [\(16:40\)](#)

And so we merged our two clinic models and we positioned me, the health coach as that very first point of contact for your prospective patients in that 15 minute welcome call. And we had me as the health coach drive that patient's very first encounter. So, you, as the functional medicine provider, you met with empowered patients, rather than patients in emotional distress. And you did not have to work through a lot of that defensiveness or fatigue or emotions that naturally come from patients feeling exhausted of trying so many things.

Kara Ware: [\(17:12\)](#)

And when we merged our two clinic models in this way, we experienced a tremendous surge in patient engagement because of our symbiotic skillsets working to support the patient through their change process. And this model that we practiced in your last iteration, it helped us, both the patient and the providers' time to be used wisely in that very first new patient appointment, because the patient was ready, Nathan, to be your equal partner.

Kara Ware: [\(17:39\)](#)

Like you said, it was so fun when these patients came in and they were telling you, "Okay, this is what I've been doing. And this is how I am organizing it. And this is how I am budgeting. And this is what I'm relying on to make the changes that we're going to decide on what I'm going to do together." And the patient actually was doing a lot of the talking in that first appointment because they were ready to co-



create their care plan as your equal therapeutic partner.

Nathan Morris: ([18:01](#))

That's right. And they were empowered. They were asking me, "What supplements are you going to choose for me today? What are we going to...?" They were kind of leading the conversation, which is... I mean I had a successful practice before you came along, but after we did about a month or two of that, I would never ever go back to being that first point of contact because it was just night and day difference. The heavy lifting was done, and I was just able to have fun and be that partner and send them back to you at the end. And you can go back over. So, this is what we're talking about is really using the resources that are available to us as functional medicine providers. And there's a lot of wonderful certified health coaches out there that can create these models that we're going to be talking about and helping you really create that ideal patient that we're all seeking.

Kara Ware: ([18:56](#))

So after so many years of working together, Nathan, we have decided to re-imagine our functional medicine journey and create more entry points to open functional medicine to a broader audience. And what a great time for functional medicine to really shine and to open to the masses when they need us the most. And there are patients who have, up until now, have wanted functional medicine, but the financial barrier has prevented engagement. And so with this in mind, we have imagined and created four entry points.

Kara Ware: ([19:32](#))

Those entry points are the advanced care path, we're going to explain all of this more in-depth, the introductory care path, the proactive care path, and the group coaching events. So, these four entry points are designed to meet more patients where they are at on their journey, based on their readiness. And each care path, it is a bundle of both coaching and medical encounters- labs and supplements. We are not going to provide those right now because we want to keep these entry points approachable and affordable. This is an onboarding step before we move the patient into a very deep commitment.

Kara Ware: ([20:10](#))

So oftentimes I see bundles based on chronic conditions, but we have taken a different route and hopefully you, the listener, you're going to see why and the benefits of that as we continue these discussions through season two. Oftentimes we have these two and a half new patient appointments with a provider and the provider's going over medical risks and lifestyle changes, and truly, that is for the advanced patient who's already familiar with this mutual participatory medical model and the nomenclature in functional medicine tenants. So, Nathan, tell us more about this advanced patient archetype and their designed entry point that we have for them. What do you see in your practice when somebody is ready for this large of an upfront investment and commitment?

Nathan Morris: ([20:56](#))

Yeah, so the advanced patient, I think most functional medicine practitioners, that's the majority of the patients that we're seeing. And it is only about 10% of the people I think that are interested in functional



medicine. So many times, I talk to people and they are asking me about it and then I say, "Well, it's a two and a half hour visit and we're going to do all these things." And I can see immediately, they kind of shut down. And sometimes, when we are looking at the advanced patient, we are really looking at a patient with the litany of unexplained complex medical issues, which is like the functional medicine creed, I think. If you do not have complex and unexplained conditions, then do not come see us. But I think we need to change that, right?

Nathan Morris: [\(21:37\)](#)

And they are familiar with functional medicine, requiring the patient to assume potential responsibility for lifestyle modification. So, they are not going to be freaked out when you say, "Diet and exercise," although they may not be putting these things together in the right way, like with sleep and they may be missing some really foundational things, but they're not going to be overwhelmed right away when you start talking about lifestyle. And they usually are not going to be freaked out, once again, when you start saying, "Oh, labs are going to cost out-of-pocket this, because we're going to do some things that are not normally picked up by insurance." And they're used to working with you as a partner and it's just not their first rodeo, as I like to always say.

Nathan Morris: [\(22:18\)](#)

And they're ready for a two and a half, they need a two and a half hour appointment because they have a lot of things to discuss. They have a lot of multiple issues that you're going to have to connect, and they have already started to understand that these things are connected and that they just need help interpreting how they're connected.

Nathan Morris: [\(22:33\)](#)

And this care path may very well split off for patients that have circumnavigated the basics and need more health coaching. I have seen some immense patients who have seen many different functional medicine providers, and although they understand the lingo and the investment, they are often missing the most basics of things. So, although advanced, there will be several who will greatly benefit from working with a health coach, but that does not exclude them from the advanced patient. But I think most of the providers that are listening to this actually very well understand who that advanced patient is.

Kara Ware: [\(23:05\)](#)

And then there are those patients brand new to functional medicine that we need to better serve by not overwhelming them so much that they never return. And so these patients, they've heard they want to heal their root causes, however, they don't fully understand all that is involved when we talk about healing the root causes.

Nathan Morris: [\(23:26\)](#)

So they don't really know the lingo yet, or really what to expect. They have not addressed a lot of the basics, diet, sleep, stress, and exercise, or the finances. And the key with this patient group is to not overwhelm them. They do not need as much time with me because they're really not sure what they



need yet, and that's part of this exploration journey is having someone guide them to what questions should they be asking me? What should they be looking for in their journey?

Kara Ware: [\(23:56\)](#)

Yeah. And they are brand new to really thinking of changing their nutrition, and removing the high allergens, they have not even really started there so much. And so, it is going to take some time to implement, like you said, the basics and really prepare them for those more advanced medical interventions. So, we have created an entry point, a care path for those brands new to functional medicine, which I love these. And in catering to beginners, I owned a yoga studio at one time several years ago, and to really grow a studio, I really had to cater to beginners, and I think we can do a better job. And that's what we're re-imagining here is, yes, patients come and they want to heal their root cause, but they don't really know what's required of them just-

Nathan Morris: [\(24:39\)](#)

Right. That's really the ones you're really going to start building that partnership and creating that active partner. And so that's so important, because if they come in cold, and all of a sudden you give them 10 to 15 things, and those are the ones that are going to be heading to the hills pretty quickly.

Kara Ware: [\(24:56\)](#)

Right. Right.

Nathan Morris: [\(24:57\)](#)

[crosstalk 00:24:57].

Kara Ware: [\(24:57\)](#)

That's why they never come back.

Nathan Morris: [\(24:58\)](#)

Right.

Kara Ware: [\(24:58\)](#)

And as you said, the advanced patient is just 10%. This is a big sector of our demographic are brand new. They've just are now hearing about functional medicine. Maybe they heard somebody that they know had some really great results, so now they are coming, but they don't really know their role, and their responsibilities, and how to go through this process, and how to make it sustainable. And then as you were mentioning, there are some patients who came to you who were all that complex, but they want to be proactive, and you're trying to fill your two and a half hour time slot to make it worth their investment.

Nathan Morris: [\(25:27\)](#)

That's right.



Kara Ware: [\(25:27\)](#)

Because [crosstalk 00:25:28] functional medicine is a significant investment upfront, and in order to achieve our goal of making it more approachable, and affordable, and sustainable, and effective, this is why we're creating these different care paths. So tell us about the proactive patient we've seen come through your practice?

Nathan Morris: [\(25:43\)](#)

Yeah, these patients probably need an hour of my time because they're already very invested in trying to get healthy. They just need a little guidance. They just need a little bit, what is healthy? What is the right type of diet? What is the right type of exercise? And these things, they are not sitting there with a complex issue. They are not so much of what we see in functional medicine, but they really ... To prevent those complex issues, we really need to address this patient so they don't have problems later on.

Nathan Morris: [\(26:10\)](#)

So this is just as much an important part of functional medicine as that patient with a multi-symptom questionnaire score of 150. These are the people that would probably have a multi-symptom questionnaire score of 30, or 20, and then they just need a little guidance on, here is the right way to eat. Here is the right way to exercise. And that is where a health coach is really, really helpful, and then you can put the cherry on top at the end and make sure that ... and these are the things you may, because of your genetics, or because of your lifestyle, you need to add these things on, and we'll follow you up in six months, or a year, and see how things are going. But these patients are really the lifeblood of a really fulfilling practice.

Kara Ware: [\(26:48\)](#)

Yeah, and as you mentioned in season one, in episode eight, is that this creates a foundation where they're coming in once or twice a year, but they're continuously purchasing supplements, so you have that passive stream of income, and they're allowing you to have a nice base of your practice.

Kara Ware: [\(27:16\)](#)

Better serving brand new patients and creating a care path for those patients who desire to be proactive, this is one way we're going to make functional medicine more approachable, and affordable, and sustainable and attract a new audience. And so now, what about possibly re-engaging former patients that left, possibly because the financial commitment was just too large. Or for patients who are calling, seeking you, they want functional medicine, but ultimately decide that at that point, they cannot afford that financial investment, that upfront investment, for one reason or another. We're creating an entry point for these individuals as well, group coaching events, this is the most affordable entry point, and this is a great need for cost effective approaches to increase patient engagement, and improving health and well-being.

Kara Ware: [\(28:05\)](#)

We need this entry point, and it still gives access to the provider, so the patient still gets what they want,



is to meet you, Nathan, the doctor, or any medical provider listening. And they get to know your bedside manner, and hear your philosophy, and they begin to build that relationship with you, which we always say is the stickiness to functional-ness. And that is what will keep patients ultimately activated in your practice. But this entry point, when we begin to offer these next year, Nathan, you'll appear for a 15-minute physician chat, and then so they can still hear basic functional medicine tenets from you, and they're still getting what they want, which is you, the provider, but then I'll lead the remaining 45 minutes to really establish that foundation that health coaching can do. Mastering the basics. That's what I like to say.

Nathan Morris: ([28:53](#))

Yeah.

Kara Ware: ([28:55](#))

Which A, of course it's going to be much more affordable, because my hourly rate is not what yours is, but it will still foster a relationship with you. That's ultimately my goal.

Nathan Morris: ([29:05](#))

Right.

Kara Ware: ([29:05](#))

Is to give the patient that bridge into working with you, who can ultimately understand their core clinical imbalances and make that treatment plan. So, we begin though to establish a relationship with the patient, and the provider, and the practice, however, at a very affordable non-threatening entry level. And so, when patients are ready for that deeper commitment, that financial investment, then their healing can actually be expedited, because they're already well-prepared to be your partner. And their lifestyle's already beginning to be organized, and they are learning their strengths, and their motivators, and what to rely on as they move through changes, and their mindset is shifting so that previous challenges don't seem so challenging anymore. And then when they come to you, they are ready for those advanced medical interventions, and the trust and rapport are well-established. So, we have a genuine partner, you have a genuine partner, and this entry point, this is creating patients. This is filling your practice's funnel.

Nathan Morris: ([30:06](#))

If you really want to think about it, health coaches your leverage point, how are you going to create leverage with the patient to help create change? And y'all are so well-trained in understanding what is it that is going to be that thing that creates leverage for them? What is that thing that's motivating them or discouraging them.

Kara Ware: ([30:23](#))

Yeah.

Nathan Morris: ([30:23](#))

And then once you can address that, then you really change the neuroplasticity of the brain. And suddenly, the neuroplasticity, you start sending out new neurons, it's a very fascinating aspect of change, in that, you actually grow new neurons that actually start creating pathways that create habits that are positive. And I am like, that's the real challenge, right? Is not somebody to be healthy for six weeks, but to be healthy for life, and to have these patterns established. And so, it's a really neat aspect that's not anywhere else in the medical field, is that, that catalyst y'all provide of understanding how are we going to treat that positive neuroplasticity?

Kara Ware: [\(31:04\)](#)

Yeah. Thank you. And how do we help patients go through that change process where they do create those new neurons and then they can have different perspectives. And that's how, when they start seeing things differently, and relying on their strengths, and understanding their tools in their toolkit, very similar to how you understand your tools, and your clinical decision-making toolkit, all of a sudden you guys are equal partners, working together to optimize their results.

Nathan Morris: [\(31:33\)](#)

So today we introduced the concept of building a practice around patient readiness, and it's similar to downhill skiing, or exercise classes where a more advanced terrain, or class could cause more harm than good, and Lord knows, I know that. I am out in Colorado now, and I'm like, "I can do this ski run." And no, I could not do that ski run. Sometimes we make assumptions of where people are at, and it is not a really good fit, and it doesn't have good outcomes, just like that ski slope. So, this holds true for the functional medicine journey, especially. With this approach, we hope to reduce, if not entirely eliminate that feeling of being overwhelmed, being on a slope or an exercise class we should not be in.

Kara Ware: [\(32:09\)](#)

Terrified for your life.

Nathan Morris: [\(32:10\)](#)

Terrified for your life. That is how I ski. So this is a root cause of poor patient retention.

Kara Ware: [\(32:18\)](#)

Yeah, exactly. And so therefore, we are re-imagining the functional medicine journey by not asking every patient to go down the advanced ski terrain, right? Either both emotionally and financially, but rather breaking this journey down in incremental steps, based more on patient readiness, by creating these four entry points, which will ultimately open functional medicine up to a much broader audience and engage more patients, because we will be matching where they're at by when they're entering, when they're coming to us, rather than asking them to go down the black diamond.

Kara Ware: [\(32:52\)](#)

So again, those four entry points that we're designing are the advanced care path, the introductory care path for those brand new to functional medicine, they know they want to heal the root causes, but they have no idea what that involves. The proactive care path and the group coaching events as we discussed



earlier.

Nathan Morris: [\(33:10\)](#)

Yeah. Introducing infrastructure models, which are effectively utilizing the resources available to providers, which IE, is the health coach. I mean, I think you are going to hear that a lot, but that's true. I mean, that is really one of the most available resources, and I think is most underutilized in functional medicine is the health coaches, for the purpose of making functional medicine more approachable, affordable, and sustainable. I mean really if we get to see that patient in that person visit and never see them again, it is really not sustainable. So, we need to create these on ramps for patients that are really approachable, affordable, sustainable. Just those three important words to take away from this. And then since lifestyle changes are essentially skill development, it makes perfect sense to integrate a health coach into these design care paths to improve patient activation and retention.

Kara Ware: [\(34:01\)](#)

Exactly. And like we said earlier than everything, how that positively affects downstream, are those clinical outcomes because they are staying around long enough, right? And then your word of mouth is boosted and what that means for your practice's bottom line. So, we know that change does not happen quickly and decisively. Coach, working with the patient on their change process, and the provider focusing on that clinical treatment plan offers a patient, a really and effective collaborative care team, so to improve their clinical outcomes, which of course has a direct impact of everything we've been mentioning.

Nathan Morris: [\(34:33\)](#)

Kara, I've got a funny story. I got to tell you and tell the audience. So, I'm starting my practice and we hadn't got all our systems in place, and I hadn't got the health coach in place to talk to my patient. And there was a friend that I was going to see in Ohio. And so, I said, "I can do this. I don't have the health coach yet, but I'm going to do this." So, I went in and 150 on the medical symptom questionnaire, all right? So, the guy had a lot going on. Man, I went in, and I created this great plan, same old, same old, and he did great for six weeks. I mean, he was kicking butt and I was like, "Yeah, I'm good. I'm good." Feeling all cocky about my abilities. And guess what? First thing that happened was stress showed up in his life, and this is his trigger point, right?

Nathan Morris: [\(35:20\)](#)

All of a sudden the wheels came off the bus and I talked to him three weeks later and we were back at square one. He was probably 75. He had moved from 150 to 75. He was back up to around 125. And everything that I had gained in that six weeks was gone again. And I said, "You know what? We have the health coach. The first place you're going, we've got to figure out how, when these life events come up, that you don't fall back into these patterns," but I didn't address these patterns. So I just want to say, no matter how good I think I am, I always get bit in the butt when I don't have that partner there.

Nathan Morris: [\(35:56\)](#)

So to be clear, the MSQ, I throw that term around loosely, but a lot of people may not know that's the



medical symptom questionnaire. And that is a part, the Living Matrix, it is actually a part of some other questionnaires, but the medical symptom questionnaire gives us a number based on the symptoms I've got, stomach pain is one. You give that two, and you have a headache and you give that four and you add them up at the end of that questionnaire, and that gives you a number that you can follow from visit to visit, to see how well the patient is actually doing in regards to their medical symptoms.

Kara Ware: [\(36:31\)](#)

And you mentioned Living Matrix, Nathan. We will talk a lot about this later in the season, when we get into configuring and integrating technology that drives your practice, so it's easy for the patient to work with you. And Living Matrix is the fastest growing, digital patient management system for functional medicine. So you'll be hearing more about that soon.

Nathan Morris: [\(36:51\)](#)

So I really hope as we go through this over the next episodes, that it really becomes clear and no matter how good you think you are as a provider and how you can put the puzzle together, if you're not creating that neuroplasticity, if you're not creating or helping that patient understand their trigger points and where they're going to go off, you're going to have a lot. So I had to start all over again and guess what, first step one, you're going to talk to our health coach.

Kara Ware: [\(37:14\)](#)

What great validation for the model that we created, where we actually had me, the health coach driving that very first patient encounter. I love hearing that. You had not seen a patient first in years, so I'm grateful to hear of the difference that makes are both you and the patient.

Nathan Morris: [\(37:32\)](#)

God I'll never do it again. I will learn. I'll learn.

Kara Ware: [\(37:38\)](#)

So thank you for listening. Remember to rate and review and subscribe and tell a friend because we are closely examining, how do we open functional medicine up for a broader audience by making it more approachable, affordable, and sustainable? Next episode, we have our guest, Margaret Moore, also known as Coach Meg, and you will hear more of Margaret Moore. But she saw a missing intervention in healthcare more than 20 years ago. So, we hope you will join us next week, as we discuss the validity of a health coach's scope of practice by grounding the profession and science, and Margaret will go into depth about, what is this unique and different skill set? What is the health coach a scope of practice, that is a genuine, symbiotic compliment to a medical provider, which ultimately can make a patient ready and able to implement the provider's treatment plan.

Kara Ware: [\(38:40\)](#)

So this season, as we mentioned earlier, is a robust season. We are going to include the new modifiable lifestyle factor, finances, and how do we include this into a comprehensive care plan without being financial investors? Also, how can we optimize a practice's inquiry or welcome call, that very first and



most important point of contact for patients? So, conversion rates, a perspective to paying patients soar. And we're going to review different case studies for health coach workflow integration models, those clinics that have effectively embedded a health coach like Nathan and I, but we're going to take a look at other models as well.

Kara Ware: [\(39:18\)](#)

And an episode about how to monetize the health coach in practice, plus interviewing and hiring, and onboarding and training and maximizing a health coach to benefit the provider, the patient and the practice. We are looking forward to season two. For more resources and materials and information go to Karawarecoaching.com/podcast. That is karawarecoaching.com/podcast. And thank you to our sponsors, Pure Encapsulations, Douglas Laboratories, Genestra brands, and Living Matrix and to our writing team, Kelsey Stafstrom and Paul Larkin. We will see you next week.

Nathan Morris: [\(39:59\)](#)

I'm looking forward to it, Kara. Having so much fun.