



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

This is Good Medicine *On the Go*. In this episode, we are talking about the 15-minute phone call, the discovery call, the inquiry call, the welcome call. It goes by many names. But we all know it as a free 15-minute, 20-minute call. And this is one of the most important steps in your patient's journey.

Dr. Nathan Morris: [\(00:31\)](#)

Yeah, Kara a lot of you may think you already had this in practice. I thought I did, but I did not realize how this first point of contact could be optimized to the level until I put you in place of that 15-minute phone call. And it was really kind of a random call. Somebody would call up in the middle of my staff's busy day. They would try to tell the patient about the practice. Really inconsistent. And then, I really found out what this 15-minute call could be, and I saw my conversion rate skyrocket. And I think it's really important for the person who thinks they have a call in place or a person who knows they don't have a call in place to really look at the important points here.

Kara Ware: [\(01:20\)](#)

Hello and welcome. I am Kara Ware, National Board Certified Health Coach and Business Advisor.

Dr. Nathan Morris: [\(01:29\)](#)

And I'm Dr. Nathan Morris, a medical doctor also certified in functional medicine. A lot of doctors, myself included, do not pay too much attention to their 15-minute phone call. But there is really a lot of good that can come out of mastering this small first encounter. Kara, can you tell us a little bit more about what you have learned about it? Because you just really have become the master, in my eyes, of how to make 15-minutes so productive.

Kara Ware: [\(01:53\)](#)

Yeah. Well, again, you said it first, this first encounter. We see this as the very first point of contact with our patients. So, indeed, it is an encounter, and it needs to be scheduled. And this is where medical care begins. It is the opportunity to not only find out what the patient is looking for and if they are a right fit for your practice, but also, start to build an emotional connection with them. And really, the way we optimize this 15-minute call for your practice is to structure it as a coaching session. And that's why we highly recommend positioning a health coach as the entrance to a functional medicine practice.

Dr. Nathan Morris: [\(02:36\)](#)

Yeah. That is right, Kara. There are a lot of people in the office, me included, who probably could do the 15-minute phone call, but could they do the 15-minute phone call well? I think that is the thing. Oh, anybody can do that 15-minute phone call, but can you do it well? And this is where you, as the health coach, you really had the training to quickly form these emotional connections, which are so important, and make the patient feel heard, and start setting expectations of what's going to happen when they come into my office.

Kara Ware: [\(03:04\)](#)

Right. Right. And we also use a 15-minute call to find out what archetype the patient most closely



resembles. Remember the patient archetypes, Nathan? We've been talking about them all season.

Dr. Nathan Morris: [\(03:14\)](#)

Well, Kara, can you just remind me maybe? Because I don't want to [crosstalk 00:03:19].

Kara Ware: [\(03:23\)](#)

Right. Right. The answer that we have come up with to the question of, how do we make functional medicine more approachable, affordable, and sustainable, and open functional medicine up to a broader audience right when the masses need us the most? And our answer was to create more entry points based on patient readiness. We have seen some archetype patients come through your practice over all these years. And so, we have that advanced patient who this is not their first rodeo. They have worked with functional medicine. They understand the financial investment. They understand the labs. They understand the functional medicine tenants. They have been in this for a while. Then we have that introductory care path. And that is for the brand-new patient. They have heard from someone else, "Oh, you need to go heal the root causes." And yeah, they are so excited. They no longer want a Band-Aid approach, but they really have no idea all that is involved. And these are the ones that we can scare away quickly.

Kara Ware: [\(04:20\)](#)

And then, we have the proactive care path for those patients who want functional medicine, but up until now, have just really been priced out of it, to be quite honest. They just have not been sick enough to afford the cost. And then, we have the group coaching events for those patients or prospective patients who are still deciding, "Is this really worth it? Is this financial out-of-pocket investment really worth it?" And so, they are still contemplating and deciding the pros and cons, but we do not want to lose these patients. We are building patients. And so, we've created that entry point, the group coaching events.

Dr. Nathan Morris: [\(04:57\)](#)

Yeah. And Kara, reaching these patients, these four archetypes, it is just so important right now because functional medicine is what is going to be so helpful in so many of these things we are addressing right now in society. And it is so great to have a way to welcome them and introduce them to functional medicine with this initial call without overwhelming them. So, I think it's just perfect timing to be talking about this.

Kara Ware: [\(05:19\)](#)

Yeah. And re-imagining the functional medicine journey. In this week's episode, Nathan, you, and I talked to our friend and colleague, Dr. Dan Kalish, who owns the functional medicine practice Kalish Wellness, and is the founder of the Kalish Institute, an online training program dedicated to building functional medicine practices. And so, we talk with Dan about general advice to optimize this call, plus the business benefits of positioning a health coach as the entrance to your practice, which will assist functional medicine practitioners to boost conversion rates from perspective to paying, while onboarding the right patients based on their readiness and with appropriate expectations, which all ultimately grows your bottom line, right after this.



Kara Ware: [\(06:15\)](#)

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Kara Ware: [\(06:57\)](#)

About a year ago, you and I worked to reevaluate some office systems at Kalish Wellness, and we actually ended up hiring and training a National Board Certified Health Coach to be integrated in your clinical practice. And one of those things we updated was the 15-minute call. What general advice would you give to more practitioners as they create their functional medicine practice, as they re-imagine this entrance to their practice?

Dan Kalish: [\(07:23\)](#)

Well, I think the main thing is that doctors are not comfortable in a marketing or sales role because I think, traditionally, medicine has been, I wouldn't say above that, because that makes us sound elitist, but not wanting to enter into the economic fray. People want to be held out as healers and helpers and not be involved in the commerce part of all this. And so, I think that is a conundrum. How do you do a sales call without it seeming like a sales call?

Kara Ware: [\(07:50\)](#)

And I've heard you say it's gutsy to call it a sales call, but it is.

Dan Kalish: [\(07:54\)](#)

Well, I know when I was at my first seminar where I heard another doctor say the word "sales," I almost got up and walked out. I really did. I was like, "This is offensive and demeaning, and I'm going to leave." But now, I'm realizing, well, maybe we need to embrace this a little bit so that we can understand how sales can be done in a respectful way that plays to the strengths of the healing process and doesn't have to run against that.

Kara Ware: [\(08:17\)](#)

Yeah. And I think you have mentioned too, that doctors do not want to come across too salesy. How do we do this 15-minute call without becoming too salesy? And it's hard for someone to sell themselves.

Dan Kalish: [\(08:27\)](#)

Yeah. I think, number one, is we want to think about not leaving this to chance and making sure that you have a structure and a script to how you want this to go and making sure that people are trained properly. It's not something that's intuitively obvious to a lot of staff members about how this can work.

Kara Ware: [\(08:45\)](#)



Both of you have successful long-term functional medicine practices. And so, when they would call your clinic, sometimes, does that person who answer the phone even have the time to really listen to that patient, as you mentioned earlier, Dan?

Dan Kalish: [\(09:00\)](#)

Yeah. They can be in the middle of checking out two other patients, someone just walked in, and who knows? There is the UPS person just delivered a big box of supplements. And so, I think we really did a lot better with this when we separated out these special calls from the day-to-day hecticness of running the front desk. And it became a special thing, just like any appointment would be a special thing with a special time, ability for the staff to focus on it.

Kara Ware: [\(09:28\)](#)

Exactly. I like how you said that, very specific, special visit type. It is a visit type. It's not just something you're doing in the midst of receiving supplements and checking patients out.

Dan Kalish: [\(09:38\)](#)

Yeah. This was revolutionary in my practice just the idea of scheduling these. Let us put it in the schedule. I was like, "Really?" He is like, "But they're not paying for it." Because I am so used to everything that goes in the schedule book having to be paid time. And that was a big deal for us.

Kara Ware: [\(09:53\)](#)

What about if a provider is doing this 15-minute call, and they have somebody who's calling, wanting to know the nuts and bolts, and how are the provider going to fix them? What is the provider going to do that is going to be magical? That's a tough...

Kara Ware: [\(10:03\)](#)

What is the provider going to do that's going to be magical? That's a tough position for providers to be in.

Dr. Nathan Morris: [\(10:05\)](#)

Yeah, I would recommend not being that person. One, because we tend to want to promise things that we should not be promising because that is just the nature of being a healer. We want to fix everyone. But we really need someone there that is not emotionally connected to the outcome as much. And that can present that logical course of, "Hey, we are going to create this partnership, and this is what's going to happen. And he is going to do the things he does. And within this partnership, we hope to see healing." But I just think that, once we come back to the salesy thing, we want to sell ourselves, and we are not comfortable with that. Most healers are not, most providers are not. Wow, it made the visit later that much easier too, because I do not have to be a salesman telling them these things. But I really would discourage that. Would you agree, Dan?

Dan Kalish: [\(10:54\)](#)

Absolutely. It is just way too much pressure. And it's not a very good use of anyone's time really.



Kara Ware: ([11:02](#))

Okay so, we're talking about, in the season, the reason why and how to effectively integrate a health coach in clinical practice. And Dan, you have talked a lot about seeing this 15-minute call as a profit center. And anytime that you can hire someone to do the work for you that frees more hours in your schedule, that's a good business decision.

Dan Kalish: ([11:22](#))

Yeah, doctors just don't know how to make business decisions, do they really? Because we are always making decisions based on the healing capacity of the human body, and not realizing that we are running this business that has requirement to have some kind of profit in it, so we can keep practicing. And so, I think if you can kind of separate yourself out for a moment from the clinical side, and just think, "Okay, what's a practical thing that I should do for the business that I'm running here?" Then, having somebody, who is relatively inexpensive, bring in a patient, who could potentially bring your business 3 to \$5,000 makes a lot of sense. And you start to look at the numbers like that. One new patient, what is that going to yield to your practice? And how much are you investing in this free 15 minute call in terms of an expense?

Kara Ware: ([12:06](#))

Right. And so, it is not even a question of how you are going to monetize this health coach. They are doing it for you by being able to have that skill set. That is the best salesperson for you guys. I mean, talk a little bit about that just for a second, is what have you found the reasons why a health coach is the best sales person for you, the practitioner?

Dan Kalish: ([12:25](#))

Well, number one, they have enough training to understand the emotional communication part of the equation. But they do not have enough training to answer the doctor questions, which is good because we do not want to do free medical advice here. And so, it is very easy for them to have these boundaries and offer ... I do not want to say sympathy, but offer some kind of, again, like connection to the practice, and an entry to the practice, and kind of set the tone. It is like when you walk into a restaurant, and you are greeted by that first person that always walks up to you at a fancy restaurant. They are just like the tone setter. And then you think, "Oh, I'm going to relax." And then, you meet the waiter a little bit later and whatnot. And it's like that. I think that any good business that is run well wants to set the tone properly for their customers. And that's really kind of the role of the health coach in that call.

Kara Ware: ([13:14](#))

That's really well said, creates the atmosphere of the patient experience from the very first point of contact, the entrance to your practice.

Dan Kalish: ([13:22](#))

You want them to feel like it's a concierge level thing. You want them to feel like they are going to be well taken care of. That's kind of the point.



Kara Ware: ([13:28](#))

Yeah, exactly. And when you placed your national board-certified health coach as that first free 15-minute call, you call it the inquiry call, tell us about the conversion rates. What happened?

Dan Kalish: ([13:39](#))

Yeah so, I thought I was pretty good at doing this. That's one of my charming characteristics, a little arrogant [inaudible 00:03:47].

Dr. Nathan Morris: ([13:50](#))

That's any provider, Dan.

Dan Kalish: ([13:53](#))

And I, certainly, though no one could do it better. And I had to be convinced to do this, by the way, by a business coach. This was not I did not just wake up one morning and say, "Oh, I'm going to hire a health coach to do these inquiry calls." There really had to be major arm twisting. But what I noticed immediately is that her conversion was like 90 plus percent. So, almost everyone that she talked to signed up. I think it's this third-party verification where the patient feels like they're getting an inside view of what I do, and how good I am, and how the whole process can work.

Dan Kalish: ([14:28](#))

And the other thing that happened is when we started to have the health coach be the first person involved, our lab sales nearly doubled, like literally overnight. So, where I was kind of hedging on, "I don't know if you need this other lab, maybe you don't." She would just be like, "This is what Dr. [Kalish 00:14:43] thinks you should do. These are the tests." And then, people just started to do them all. And so, rather than me trying to sell coaching services and lab services it was more effectively done by someone else by outsourcing it.

Dr. Nathan Morris: ([15:02](#))

So, Kara, Dan just gave us some really good points on the business positives of the 15 minute call. But a lot of our listeners really want to get down to the nitty gritty. When you figured out the structure to the 15-minute call that boosted the new patients I saw each month, but you did not really have to reinvent the script over and over, and over again. And they had a consistent experience regardless of the patient. Tell us why the health coach is the best person for this position, and how they can recreate this experience, so that it's something that's consistent in the practice.

Kara Ware: ([15:33](#))

Yes, thank you. This is one of my favorite topics.

Kara Ware: ([15:36](#))

In this section of the episode, you will hear how I use motivational interviewing, a counseling technique. And specifically, the motivational interviewing tool OARS, that is an acronym, O-A-R-S, which I will



explain here in just a second. And I use this to boost conversion rates by building trust and rapport. Meaning I established an emotional connection without giving medical advice. I could hear the patient's needs and reflect that back to them. And I could transform any instant gratification expectations that the patient may be coming with because I can hear that. And we know this can sabotage a partnership. And plus, I could help onboard the right patients into the corresponding care path that was the best fit for their readiness.

Kara Ware: [\(16:24\)](#)

I was in the first graduating class at The Functional Medicine Coaching Academy. And I worked as a course facilitator and practicum supervisor for them after I graduated. And I really studied through their curriculum, they have a top-notch curriculum for training health coaches. And so, through their curriculum, I was introduced, really for the first time, to motivational interviewing. I had been a health coach since the early 2000s, and this revolutionized my approach to health coaching. And I studied the book, and still do regularly, Motivational Interviewing in Healthcare by Rollnick, Miller, and Butler.

Kara Ware: [\(17:02\)](#)

And motivational interviewing, this is the best behavioral change model, I feel, for working with patients who are frustrated, maybe even angry. And that is who I was talking to a lot that were coming to your practice. They were guarded, they were angry. Their medical journey has not been easy. And they still are holding onto hope. And, now, they're at your practice and it's up to me to make this, as you and Dan said, their experience from this very first point of context sets the tone, it sets the mood, it sets the atmosphere for their healing journey.

Kara Ware: [\(17:41\)](#)

And so, motivational interviewing it taught me really how to flip the conversation. So, typically, when a patient calls, it is easy just to start answering their questions and telling all the benefits of the practice. The person from the practice is doing more of the talking. With the motivational interviewing structure, I have found this as a method to flip that conversation where the patient did more of the talking. And that was exciting. They were beginning to share their story at this very first encounter. And, as we all know, functional medicine is all about the patient's story.

Kara Ware: [\(18:16\)](#)

So, motivational interviewing has a tool, that I refer to as, OARS, it's an acronym O-A-R-S. And that stands for open-ended questions. So, I am asking the patient questions about their pains, a little bit about their history, what they perceive as the underlying causes of inflammation, what they hope to gain, what they are already doing that is going well, what they are looking for. And the patient is doing most of the talking. A is for affirmation. I am strength spotting through our entire conversation. I'm affirming their character strengths that I can recognize, for example, their perseverance, and bravery, and courage to step out of the box, and seek root cause resolution rather than just more Band-Aids even when they're struggling to get out of bed most days.

Kara Ware: [\(19:03\)](#)



And then R is reflections. Reflecting what the patient needs, reflecting something I heard them say. These are statements of understanding. And then S is summarizing our conversation and checking in to make sure, for accuracy. That I heard them correctly. And then, asking permission to now share what the practice can offer, and how we like to partner with our patients.

Kara Ware: [\(19:27\)](#)

So, Dan recommend having a script. I did not have a script while I was doing this call for you, Nathan, but have since created many training materials for this most important first point of contact with a practice. And I have published an e-book training manual on how to effectively integrate a health coach into clinical practice. And this will be made available with episode seven. So, that will answer all your questions. Okay, I'm ready to do this, now, how?

Dr. Nathan Morris: [\(19:52\)](#)

That's awesome. So, basically, what you're telling me is that with health coaches and health professionals trained in MI, what really comes across with you not talking the 15 minutes about ...

Dr. Nathan Morris: [\(20:03\)](#)

... come across, and where it really comes across with you not talking the 15 minutes about the practice is much less salesy. We removed the sales pitch. And I think all providers are uncomfortable with the sales pitch, and I think patients are astute and they can pick up on that. And so, you're really hearing them in that 15 minutes, maybe for the first time ever, and you're making that emotional connection when you hear them, right?

Dr. Nathan Morris: [\(20:22\)](#)

And also, you're knowledgeable and can connect the dots between the patient, the provider, and the practice. And what a lot of doctors or providers do not understand is that no medical advice is given during this. So, this is about creating that connection, hearing the patient, and understanding what they want to do, and help guide them into the practice, and let them have reasonable expectations. And the thing I found is that health coaches work well with emotionally charged patients, who are angry or even hostile in some cases. I mean, they're really pissed.

Kara Ware: [\(20:54\)](#)

Mm-hmm (affirmative). And the 15-minute call, I love these. These were one of my most favorite parts of my job in your practice, is because it is a mini coaching call. At the very beginning, this is how we are setting the tone for their healing journey. And so, that is why we are advocating that health coaches are the best person for this very important first point of contact, this entrance to your practice. Because they are so well-trained in motivational interviewing, and this can easily address a lot of the patient pain points and help onboard the right patients, and therefore boost conversion rates. So, the patients that are coming to your practice, we're keeping them.

Dr. Nathan Morris: [\(21:32\)](#)

Yeah, so Kara, tell us more about how you use motivational interviewing to make that transformation



with those expectations, that when the patients do come to the practice, wanting to know what is the doctor going to do for me? And I think you experienced this a lot, that is their first question. What is the doctor going to do for me? And you cannot see into a crystal ball. You do not know what I am going to do. So, how do we use motivational interviewing to temper those expectations, and create that therapeutic partnership that is so important for me and the patient? And you start that process and help them understand what a therapeutic partnership is. Can you give us a little more insight into that?

Kara Ware: ([22:07](#))

Yeah, yeah. This is my favorite. Because as we mentioned, any preconceived expectations will sabotage the partnership. And the partnership is that stickiness of functional medicine is how well you, the provider, and the patient form that therapeutic partnership.

Kara Ware: ([22:22](#))

And so, we talked about open-ended questions, so that I acknowledge the questions that are important to them. Great questions. And then I just ask, "Before I even answer these, can I just hear a little bit about what's going on? Are you comfortable with sharing that, so I can understand what you're looking for, and what you need, and what you're hoping to gain?" And when I present it that way, I hear sighs on the end of the phone. So many times, they are like, "Okay." They weren't prepared for someone to really listen to them, and validate them, and let them feel known.

Kara Ware: ([22:59](#))

And so of course, I want to know how did they find you? And we would track that, so we understood where are your referral sources coming from? And of course, I would want to hear about their pains. And then I would want to hear about well, what are they hoping to gain, and their life goals. And I can hear when the last time was, they felt well. And I can hear what they perceive as the root causes, and what do heal the root causes even mean to them. And that is when we really get into a brief conversation about how long they feel, their perceived time expectation of healing the root causes. How long is this going to take? And that is so important to address that up front.

Kara Ware: ([23:39](#))

And this is when we began to have that patient accept that this is a long journey, and that we want to make sure we're coming alongside of them and co-creating, as partners, a livable, a reasonable care plan they can live. And all throughout, I am strength spotting, and hearing what they are already doing well, and how are we going to build on that? And I can hear their readiness, and I can hear that next intelligent step for them to take, where we're not asking them to jump over this chasm of getting to too large of a commitment too soon, and then they're way in over their heads and they don't come back.

Dr. Nathan Morris: ([24:16](#))

Yeah, I mean, you're setting yourself up for your one hour health coaching, too. You are creating that expectation. Because for us, it is the 15-minute interview. You identify, "Hey, this would be a good patient for us." They identify us as, "Hey, this would be a good practice for me." And you are gathering information for your next one-hour health coaching visit. So, they know you, they are not just meeting a



health coach randomly. So that is a nice, easy way. And you know with our health coaching, you can really make that the most effective as you can.

Kara Ware: [\(24:47\)](#)

Yes, Nathan, as we mentioned in our last episode, I'm the professional who's driving the patient's very first 60 minute encounter in our coach provider workflow, the sequence of coach provider encounters within our bundled care paths. So, it is easy for the patient to understand why they are meeting with me first, rather than the provider, because we already established rapport and trust. They've already met me at the entrance to your practice.

Dr. Nathan Morris: [\(25:17\)](#)

So, after the patient shares their perspective, how they're feeling, they're venting their frustration and hopes, which I think is brilliant, right? Because they already start healing. That is awesome. What do you do next?

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

Yeah. So, going back to that OARS acronym. So, we open-ended questions, and affirmed, and did some strength spotting, and what was going well, and what did they hope to gain? And then I reflect all this back to them. I ask them permission, "Is it okay? This is what I am hearing, is this true? This is what you desire, and this is what you need to feel successful, and this is your current ability, and this is the level of commitment you are ready for. Is this accurate? Am I hearing you right?" And then, that allows them to either correct me or expand.

Kara Ware: [\(25:58\)](#)

Again, this is trust. This is rapport. This is creating that emotional connection. This is not sales. This is healing. And that is why this 15-minute call is so important. And we are connecting, we are revving up those twin engines of change that we have talked so much about in season one. The self-determination, "I want to" which all patients do, that is why they are coming to us. But that self-efficacy, that feeling like "I can do this." And this is where, the very first place, that patients start to work on that together, of getting that, "Okay, I can do this," is in this 15-minute call. So, that's the framework, the OARS, open-ended questions, affirming, reflection, and summarizing.

Dr. Nathan Morris: [\(26:40\)](#)

That's awesome, Kara. And I think that really gives us some framework to, how are we going to use this 15-minute call to hear the patient? And that really, as you say, creates that emotional connection, because no one has listened to them in a lot of times. Especially if they are coming from the allopathic world, and they are told, like so many of our functional medicine patients, that this is all in their head, and that you need this antidepressant or anxiolytic. And when you listen, and you summarize, and you validate, which we learn in functional medicine as well, but we do not always have the time to do that, and they hear back what is important to them, this is the beginning of the healing journey. I mean, this is really where it begins. This is really where we start shifting the system to healing, because the belief that they can get better is so, so powerful, and being heard is really that first steppingstone. So, that's why it



[crosstalk 00:27:34]-

Kara Ware: [\(27:33\)](#)

I'm going to elaborate on what you just said, Nathan. Sorry, I interrupted you.

Dr. Nathan Morris: [\(27:36\)](#)

Oh, that's great.

Kara Ware: [\(27:37\)](#)

This is where we really move out of the prescribe and treat model that they're so used to in conventional setting, and more into this mutual participatory medical model that we are in functional medicine. And this is when I ask patients, "Okay," so they have corrected me, or they said, "Yes, this is what I'm looking for." And I say, "Okay, now," and so they vocalize their commitment. They are ready, they are chomping at the bit, now. This is exactly what I want.

Kara Ware: [\(28:03\)](#)

And then I say, "Is it okay now if I share the care path that I can hear, that I feel we can come alongside of you best, and walk these steps toward your ultimate goal, and make sure that it's this incremental process, so we don't get in too far, too soon, which can cause overwhelm. And is it okay if we agree right now, that overwhelm is just a sign that we are trying to do too much? And if we feel overwhelmed, are you okay letting us know?" And so again, we're setting those agreements in this 15 minute call.

Kara Ware: [\(28:34\)](#)

This is where I then say, "Okay, I can hear you have worked with several functional medicine providers. You understand it will take time to work with Dr. Morris to continue addressing the root causes of your concerns, and you are ready to partner with him. I can hear the advanced care path sounds like a great fit for you. May I tell you more?"

Kara Ware: [\(28:52\)](#)

Or I may say, "I hear you desire to heal the root causes, but you don't necessarily know all that's involved, or even where to begin. You are just really beginning to learn about functional medicine. May I tell you about the introductory care path we have for you?"

Kara Ware: [\(29:06\)](#)

Or I can say, "Hey, I hear you're being proactive. Awesome. We love that. We have this proactive care path for you."

Kara Ware: [\(29:13\)](#)

Or sometimes I say, "Okay, you're not exactly convinced that this investment is worth it. Is that what I am hearing? You have tried so many things and have many doubts. Can this really work for you? You are still deciding the pros and cons of working together. So how do you feel about this? We have the most affordable entry point, where you still have access to the medical provider, and you can start your



functional medicine journey, and establish very important, fundamental, foundational pieces to your care plan at the most affordable rate. And this is our group coaching events." And this entry point, I don't say this to the patients, but I'm saying to you, this entry point is we don't want to lose these patients that aren't quite ready just yet, right? This is how we build patients. This is how we create patients. But this, when I hear-

Kara Ware: [\(30:03\)](#)

... build patients, this is how we create patients, but this, when I hear patients who are still weighing the pros and cons of this investment is really worth it, this actually is based on the Transtheoretical Model of Change by James Prochaska that I've referred to often through this series. And so, this perspective patient, we do not want to lose them, but they are just not quite ready for that financial commitment, or emotional commitment just yet. But ultimately, I am saying to the patient, "Hey, we understand where you're at. We can work with you there, and then we can make a plan to work together, to move you incrementally towards experiencing your health goals."

Dr. Nathan Morris: [\(30:40\)](#)

Yeah, it's really that kind of personalization that we've been after for so long in functional medicine. How do we personalize this experience, and we start personalizing right away through this baiting process to identify patients willing to enter a participatory role. Now, if patients are not willing to enter into a participatory role, we really don't want them in our practice.

Kara Ware: [\(30:58\)](#)

Right.

Dr. Nathan Morris: [\(30:59\)](#)

And I think that's important to say too. In that 15 minute call, we can accomplish a lot, but we can't make people want to be involved and may not looking for that magic pill-

Kara Ware: [\(31:09\)](#)

Yeah.

Dr. Nathan Morris: [\(31:09\)](#)

The patient begins to understand their role in the partnership from first point of contact, and agrees this is what they want, so it's their decision. It is not like... I do not know, that is really empowering that, "Hey this persons' heard me, they've given me choices and I'm making this decision." And so that really pro-activeness enters in to the picture right there and they understand the commitment and they especially will understand it more when they have that one hour of health coaching, and both time and money, and what it will take and how to work with the practice with any limitations they may have.

Kara Ware: [\(31:47\)](#)

Okay, Nathan, we have talked about a lot today as always. Let's recap of what we have recommended as a plan to improve conversion rates, so to positively affect a practices success.



Kara Ware: [\(31:59\)](#)

We heard from Dan Kalish, the founder of Kalish institute. And of course, we will have links to his resources in our show notes. But we talked with Dan who recently onboarded a National Board-Certified Health Coach, Jennifer [Stump 00:32:12], into his functional medicine practice, Kalish Wellness. Once she was positioned to handle his 15 minute inquiry calls, we heard Dan share how his conversion rate is the highest it's ever been, and his lab sales nearly doubled.

Kara Ware: [\(32:27\)](#)

We also learned about motivational interviewing. More specifically the OARS acronym, O-A-R-S, which is a tool to engage and build rapport with patients and assess their needs, their readiness, and using this tool allowed us to flip the script. No longer was your practice, or a practice, doing most of the talking when a patient first calls and inquiries about your practice, but rather we are hearing more from the patient. What is the patient looking for? What does the patient hope to gain? What is their level of readiness, right? Functional medicine is all about the patients' story, and this is the very first encounter where we begin to hear that story.

Kara Ware: [\(33:09\)](#)

And this technique helps us boost conversion rates by building trust and rapport, which is that emotional connection, we're not giving medical advice. We are transforming any instant gratification expectations the patient is bringing, which as we know can sabotage functional medicine. And we are onboarding the right patients based on their readiness and we are pairing patients on the right care path for them. And remember those archetypes, the advanced care path, the introductory care path, proactive care path, and the group coaching events.

Kara Ware: [\(33:44\)](#)

So, if you're a provider and you're listening and you agree with us that we have indeed made a strong case for how and why to integrate a health coach to make functional medicine more approachable, affordable, sustainable, and you're wondering, "Okay, well now how do I do this? How do I find a health coach?" Well, we are building up to an episode on how to interview hire, train, manage, and optimize a health coach, and plus there will be a training manual available to help expedite this process in your practice. So we are building up to an episode in a couple weeks for that.

Dr. Nathan Morris: [\(34:20\)](#)

And in the meantime Kara, we're going to be talking about the new modifiable lifestyle factor, finances, and I love to give you credit for this because you're the one that taught me this, and I don't think anyway else has really talked about that.

Kara Ware: [\(34:32\)](#)

Thank you.

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



And as we try to reach the masses, and we try to reach new people, we have to acknowledge the elephant in the room, which is that functional medicine is expensive and how a health coach can work with a patient for long term financial planning, and financial care plan management. That's just huge, and it's about co-creating a plan that's within the patients financial threshold and I think we as functional medicine providers, really have to start thinking about this and address this elephant in the room, and how as a practice, we can make care for patients affordable and how the patient can work to afford it.

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

Yes, this is one of my favorite topics. [crosstalk 00:35:12]- well, this whole season is one of my favorite topics. I keep saying that. Thank you for listening as Nathan and I reimagine the functional medicine journey by creating more entry points for patients to make functional medicine more approachable, affordable, and sustainable, remember those three words, and how and why to integrate a health coach in clinical practice. Remember to rate, review, and subscribe and tell a friend. Plus go to Karawarecoaching.com/podcast. That's K-A-R-A-W-A-R-E coaching.com/podcast for show notes, resources, and soon a published eBook for a training materials.

Kara Ware: ([35:55](#))

And again, thank you to our sponsors, Pure Encapsulations, Douglas Laboratories, Genestra brands, and LivingMatrix, the fastest growing digital patient management system for functional medicine.

Kara Ware: ([36:09](#))

And thank you to our writing team, Kelsi [Stafstrom 00:36:12] and Paul Larkin, and our audio engineer Isadore [Nieves 00:36:16].

Dr. Nathan Morris: ([36:16](#))

Thanks so much, Kara, this was super great talk. I absolutely loved it.