

## PERSPECTIVES

# How To (Easily) Create Protocols That Clients Actually Follow

Nathalie Garcia

*Nathalie Garcia is the Co-founder and CEO of Practice Better, a hybrid EHR allowing you to manage and scale your private practice right. Practice Better helps you keep clients accountable and streamline your work from one secure place.*

We understand how frustrating it can be to spend so much of your time putting together your clients' protocols and not have them follow through. After all, they need to take action if they're going to see results. The changes your clients will need your help to make are not always easy, but in many cases, they're crucial. In order to make your client's success a bit easier, it's important to understand how the delivery of your professional recommendations can directly affect a client's ability to follow through on said recommendations.

That being said, there are multiple reasons why clients may not be adhering to your protocols as well as they could be. In this article, we're going to walk you through some easy fixes you can make that will actually save you time on creating client protocols and help them follow through. Their adherence to your health and wellness plans aren't only important for their own success, but for yours as well. As an entrepreneur (yes, you are), your business thrives when your clients thrive.

### Be Thorough and Organized

For every recommendation you make, be sure clients are absolutely clear on what, why, when and how. Whether you're making nutrition, supplement or lifestyle recommendations, clients will need to know this for each.

For example, if you're making recommendations to clients as to what they should or shouldn't eat, spell it out. Provide them with a list of approved foods, as well as a list of foods that they should avoid. They'll do better following your directions if you can tell them why it's important to their success. If there are particular food combinations that clients should focus on (or avoid), make that clear as well. You should also include a couple of quick and easy recipes that they can try if they get stuck. The same applies for lifestyle changes and even supplement recommendations.

*Food recommendations as seen by clients in Practice Better.*

The screenshot shows a 'Food Recommendations' section with three main categories:

- Foods to Include:**
  - Eat more leafy greens:** Spinach, Kale, Swiss Chard, Collard Greens, Arugula. Description: Dark leafy greens are jam-packed with nutrients such as Vitamin C, Vitamin K, Iron, Calcium, Magnesium, B vitamins and antioxidants. These nutrients can be especially helpful with reducing stress, balancing blood sugar, improved sleep, improved immunity, improved mood, weight loss and more.
  - Include good sources of protein at every meal:** Lentils, Black Beans, Chicken, Turkey, Fish. Description: Protein helps to slow the release of sugar into your bloodstream. Aim to include quality protein sources to each meal to help maintain energy levels and mood, while decreasing tiredness and irritability.
- Foods to Reduce:**
  - Cut back on sugar intake:** Cookies, Cakes, Sugar, Maple Syrup. Description: Cutting back on sugar is really important when trying to manage stress and improve your quality of sleep. It can be really difficult in the first few days of cutting down on your sugar intake. Here are some strategies that can help you cut back on your sugar intake and minimize cravings and withdrawals:
    1. Stay hydrated
    2. Eat more greens
    3. Eat more fiber and protein
    4. Get enough sleep

*Supplement recommendations as seen by clients in Practice Better.*

The screenshot shows a 'Supplement Recommendations' section with a list of supplements and a 'Supplement Chart' table.

**Supplement Recommendations:**

- HMF Replete:** Gentle. 1 sachet, Once per day (With breakfast), As needed.
- Vitamin C:** AOR. 1 capsule, Once per day (Mid-morning).
- Cyto B-Complex:** Cyto-Matrix. 1 capsule, Twice per day (With breakfast, With lunch), Ongoing.
- Magnesium Bis-Glycinate 200 Gentle:** CanPrev. 1 capsule, Once per day (Before bed), Ongoing.

**Supplement Chart:**

Name	Upon waking	With breakfast	Mid-morning	With lunch	Mid-afternoon	Evening	After dinner	Before bed
HMF Replete Gentle Gut Health, Improved Digestion		1 sachet						
Vitamin C AOR Antioxidant Support, Stress Support			1 capsule					
Cyto B-Complex Cyto-Matrix Stress Support		1 capsule		1 capsule				
Magnesium Bis-Glycinate 200 Gentle CanPrev								1 capsule

The "why" needs to be clear in order for clients to buy into the value of following through on your recommendations, as well as the confidence to take action. Here's an example of how to detail and organize your food recommendations for your clients.

In addition to making it easier to follow your recommendations, it can also save you a lot of time as you can save your recommendations in the Practice Better app and use and personalize them again and again for other clients.

### Make It Easy and Accessible

Not everyone loves to spend their days going from health food store to health food store. And even if they do, not every health food store will be able to carry all of your favorite professional brands. Choosing to fulfill supplement recommendations by an online dispensary like Fullscript will allow clients access to the quality products they need across the country. Clients will be able to order their supplements online and have them delivered right to their door, making protocol compliance much easier.

The robust Practice Better - Fullscript integration allows you to select high-quality supplements from Fullscript's extensive database and send your recommendations to your clients without ever leaving Practice Better!

Even if your favorite product is backordered, you can easily compare and swap Fullscript stock in seconds.

### Be Concise and Focused

Don't overwhelm clients with too many new things all at once. Striking the balance between doing too much and doing just enough to give your clients early wins isn't always easy. You have the big picture and want to fast-track to having them feel their best, but that's not always possible. Small wins are incredibly important, especially in the beginning of working together, to build some momentum and confidence.

Supporting resources are a great way to provide a bit of extra information to reinforce your recommendations as part of your protocols.

### Check In Early

Check in with your clients quickly after they've started a new protocol to find out how they're doing following your recommendations. If they're doing well and have no issues, they can likely continue with your recommendations for the duration, or you could also choose to add to their protocol.

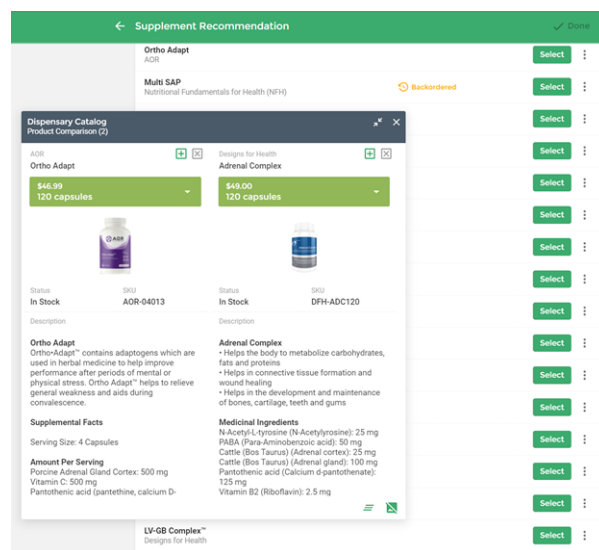
If your client is struggling with sticking to their protocol consistently, it's a good time to pare back recommendations or provide additional resources. Something is better than nothing and it will be easier to build upon your initial recommendations if you can give clients consistent wins.

### Keep It Within Reach

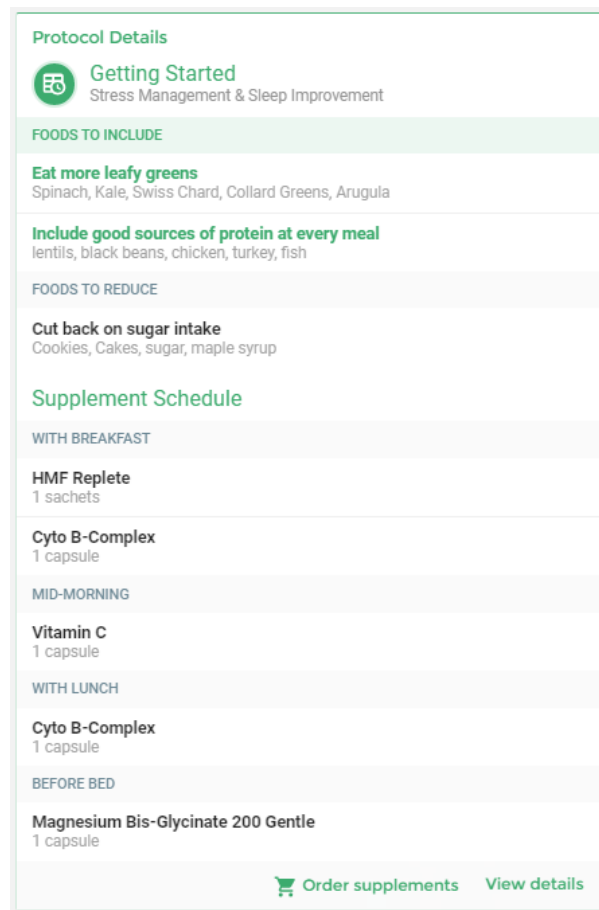
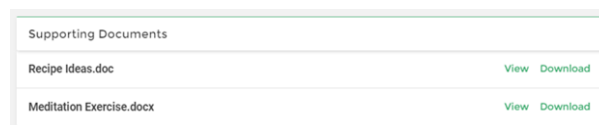
Another issue is accessibility to your recommendations and resources. Instead of requiring clients to dig through emails or shuffle through papers, keep all client resources conveniently in one secure location. This makes it easier for clients to reference your recommendation and eliminates yet another excuse not to follow through.

These recommendations should be organized, detailed and easy for you to update. Logging into the Practice Better app to see current (and previous) protocols gives clients the confidence to implement your changes and even see their progress from the beginning.

### Comparing similar products available in Fullscript from Practice Better.



### Supporting documents added to a protocol in Practice Better.



## Build A Library & Reuse

Providing more detailed, organized and accessible recommendations can actually save you a lot of time. First, it saves you the time of needing to go back and forth with clients to clarify missing or incomplete information. Second, by saving your food, supplement and lifestyle recommendations in Practice Better you can quickly create new customized protocols or build upon previous ones. You can create Practice Better Protocol Templates from scratch or by pulling in Fullscript protocols to reuse over and over again.

Don't give your clients reasons not to take action. By eliminating the hurdles that could negatively affect their protocol adherence, you're making it easier for them to follow your recommendations and work towards their goals!



*Practice Better is a hybrid electronic health record that allows you to manage and scale your private practice right by keeping clients accountable and streamlining your work from one secure place.*

# better

Practice Better helps you manage and scale your practice like a pro!

- ✓ Automated Client Onboarding
- ✓ Client Communication & Accountability Tools
- ✓ Professional Recommendations & Fullscript Integration
- ✓ Group Programs & e-Courses

**GET STARTED**

