

## **How to Thrive as a new Acupuncturist and Small Business Owner**

**- A business mentoring program designed for Licensed Acupuncturists who graduated in 2015 or 2016.**

Carola Stepper, LAc, 2001 OCOM graduate is the owner of Cascade Acupuncture Center, LLC (CAC) with locations in Hood River and The Dalles, OR.

She also owns Cascade Acupuncture Mentoring, LLC, which offers this program:

### **A. Five monthly group meetings in Hood River, Oregon on the first Sunday of the month:**

1. Sun, Dec 4th, 2016, 2-6pm
2. Sun, Jan 1st, 2017, 2-6pm
3. Sun, Feb 5th, 2017, 2-6pm
4. Sun, Mar 5th, 2017, 2-6pm
5. Sun, April 2nd, 2017, 2-6pm

Minimum group size: four, maximum: seven. This will be a confidential group.

Date change possible with group consensus.

### **B. Monthly phone consulting**

**Each participant receives seven 30 minute phone consultations, between November 2016 and May 2017.**

**The total price is \$900, first payment of \$450 due prior to the first phone consultation in November, second payment of \$450 due by February 5th, 2017. Credit cards accepted.**

Carola offers an optional site visit to the participant's clinic location to review and offer suggestions spanning all aspects of the practice. Price varies, depending on time spent and clinic location.

Registration opened 10-24-16.

### **Business Topics covered**

The topics will address four general areas. The individual topics will be selected and prioritized according to participant's preferences and Carola's input prior to the first meeting. The following topics can be part of the meetings or phone consultations.

1. **Setting up and running a business** (Purpose, vision, work ethics, business model/entity, coaches, assistance with writing/editing a business plan, assistance with writing a business budget, professional support and more)
2. **Marketing, getting new clients to come into the practice** (successful marketing tools, roleplaying and drills what to say at an event, how to market yourself, how to close a lecture, elevator speech, assistance with marketing plan, top of mind awareness and more)

3. **Running a sustainable, healthy Acupuncture Practice, daily operations** (Roleplaying and drills how to educate clients and how to present long-term treatment plans, current practice analysis, office time and hours, insurances, fees, selling products, statistics, clinic space, quality control and more)
4. **Clinical topics based on CAC's proprietary Acupuncture Associate orientation** (Role playing and drills: client flow with 2 or 3 rooms without office staff, initial free consultation, new client systems, distal style needling, needling efficiently with 5 or 10 packs, re-exams, information on insurance authorizations, charting, and more)

During the monthly group meetings each participant will have time to share and receive feedback. This group of practitioners will become a support community for the participants!

Additionally there will be a private FaceBook group for participants to share successes, questions and ideas with each other and Carola.

***"My goal is to give you tools and skills in all areas needed to run a successful Acupuncture business and motivate and inspire you about your career!"***

***Carola Stepper, LAc***

### **Experience**

Carola started her Hood River clinic with \$12,000 in 2005 and added The Dalles location in 2006, approximately the same initial investment and size (1000 sqft). Each clinic has 2 treatment rooms and one room with 4 recliner chairs.

In 2013 she opened the Stevenson, WA satellite clinic with \$10,000. It had one treatment room and one room with 3 recliner chairs and was operated by one Acupuncturist, seeing 3 clients per hour. Office staff worked one half day per week, during non client hours. It was open 2 days per week and averaged a gross income of \$78,000/year. She sold it in March 2013 using a broker.

The total CAC revenue has grown from 2006 to 2015 by 270%.

CAC was awarded the Columbia Gorge Region Small Business of the Year Award by the Small Business Development Center in 2007 and 2010.

She has managed a team of up to fourteen employees, including up to four Licensed Acupuncturists. Over the last 11 years she has mentored fourteen CAC Acupuncture Associates some of them now own successful Acupuncture practices on their own.

She has taught her class "How to grow and sustain a healthy Acupuncture Practice", with 36 business topics to Licensed Acupuncturists and OCOM students.

She has also offered phone consulting with Licensed Acupuncturists.

Prior to opening CAC she has practiced in the following settings: Home visits, working out of her home, in a beauty shop, inside a retirement home, as the first Acupuncturist in rural Goldendale, WA and she worked for four years as a part-time employee at Mid-Columbia Medical Center in The Dalles, Oregon.

For the last 11 years Carola has received extensive coaching and business training with different coaches at David Singer Enterprises, the Small Business Development Center and Catalyst Performance Consulting.

When Carola is not running her business or seeing clients she loves to hike, mountain bike, ski, kayak, do triathlons and dance in the beautiful Columbia River Gorge.

### **Testimonials from Carola's Acupuncture Associates:**

*"Learning from Carola has been an honor and a privilege. Her methods of running a successful business and her clinical wisdom on how to treat clients efficiently and effectively are invaluable lessons for any recent graduates of Chinese Medicine. During my orientation as an acupuncture associate, Carola found the perfect balance between fully supporting me in my learning process and challenging me to grow as practitioner and as a businesswoman. I truly believe that by sharing her experience and her success, she is changing the business of acupuncture and Chinese Medicine as we know it, for the better."* HC, CAC employee

*"Carola is passionate about her business training and patient and accessible about making sure that her audience is understanding what she is presenting."*

SK, CAC employee and former OCOM business class student

*"I was definitely struggling with getting my own clinic up and running when I applied to work at CAC. I had graduated years prior to starting work with Carola and although I was passionate about TCM, I was without direction when it came to the business side of things. I took the weekend seminar she offers at OCOM and was truly excited to learn more. During my training, I was introduced to a whole new level of business. From marketing the business (at locations such as Farmers Markets to Assisted Living Homes to Social media), to running a business as well as clinical information; treatment plans, re-evaluations, ordering herbs, etc. Learning from Carola and the other acupuncturists was a true gift."* RH, former CAC employee

*"I met Carola six months after completing the boards while trying to build a practice. Finding Carola at that point in my journey was exactly what I needed. Her mentorship gave me the guidance and confidence needed to thrive. Carola and her staff taught me extremely effective acupuncture methods, client retention techniques, and marketing all so key to a successful practice and rarely discussed at the big schools. I have moved on from CAC, but will always be thankful I crossed paths with Carola and for all she has done to help me be my best."* MS, former CAC employee

*"Carola Stepper, LAc was instrumental in my success as an Acupuncturist! I can not stress enough the importance of the knowledge and information that she has to help a student become a practitioner or a current practitioner become even better! She is an exceptional teacher! She is clear in her communications and boundaries. She is brilliant at connecting with patients about our medicine and the benefits of Acupuncture."*

*The impact that Carola had on my professional life is beyond what words could even express because I know I would not be the successful practitioner that I am without the mentorship and leadership of Carola. I truly wish that all students could have the opportunity to work with her in order to help them communicate more effectively with their patients. She truly teaches students and providers the art and skills necessary to translate our profound medicine into terms and ideas that patients can connect with.*

*She is a wonderful and successful provider and business woman. It is increasingly difficult to straddle the world of being a provider and running a business, but Carola continues to navigate it with elegance, clarity and intelligence.*

*I have a profound respect for what Carola has accomplished as a medical provider and as a practitioner. I think that anyone could benefit from her wisdom and experience in so many different ways!" Thank you, Lisa Pool, LAc" former CAC employee*

#### **Testimonials from Licensed Acupuncturists who attended Carola's CEU accredited business class "How to Grow and Sustain a Healthy Acupuncture Practice" in 2009**

*"Finally! The information that all Acupuncturists have longed for while we were students! Carola has put together some the most valuable information on how to succeed as an Acupuncturist, and has presented it in a way that makes me feel empowered to do it. She addressed the issues that for me are the most daunting - and most crucial - to tackle. Thank you!" M.C., LAc*

*"Carola's class was well worth the drive from Bend. Her range of knowledge, experience, and passion for the profession were impressive. The vitality with which she presented it made sitting inside on a beautiful day painless." Andrew Scott, LAc*

*"This seminar was packed with practical practice building gems and loads of resources! Any student of Traditional Chinese Medicine would be years ahead of the game if they were given this wealth of information early on in their education. I feel confident this seminar will help me transition to a new and vibrant model of healthcare! Thanks Carola!" K.O., LAc*

*"This seminar is just what I needed! Carola Stepper, LAc blew me away. I was so impressed with how thorough and detailed it was. Her challenge was to address each aspect of developing a successful Acupuncture practice while challenging us to commit on paper to our own plan of action. It was inspiring and pro-active. She not only covered everything from clarifying our purpose, style of business, practice, marketing plans and goals, but also how to diligently take care of our clients while protecting ourselves. Lastly, the resources she shared and how she personally and successfully handled her own affairs from her years of experience and professional development."*  
*Kim K Finley*