

# TWELVE VISIT PROTOCOL

for Lifetime Patients

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By Jeffrey Grossman, EAMP





## 12-Visit Protocol for Lifetime Patients

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By Jeffrey Grossman, EAMP.

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Jeffrey is available to speak on the subjects contained in this e-book. Feel free to contact him for information regarding speaking, teaching and coaching engagements.

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This e-book is loaded with excellent information that can help you keep your patients for life!

Most patients seek us out when they are in obvious pain and physical distress. Many of them don't think that acupuncture can help them in the long run to stay healthy, longer!

The 12-Visit Protocol is designed to help you develop specific structures in your practice so you can make the most of every patient visit. With a clear structure in place, aside from the obvious, performing acupuncture and prescribing herbs, you know what to do with your patients and for them during each visit.

These protocols are not set in stone. Feel free to add or subtract to what I do in any way you wish. I have noticed from using my own practice as a living laboratory, that with these 12-Visit concepts, I am able to relax in trying to figure out what I do, and focus primarily on treatment.

If you have anything to add or suggest about any one of these protocols, please contact me at [jeffrey@acupuncturemediaworks.com](mailto:jeffrey@acupuncturemediaworks.com).

Good luck and most of all, do not take the 12-Visits too seriously, they are here for you to use as a guideline. Once you start to put them into practice you will make some tweaks and changes to them as they suit your style.



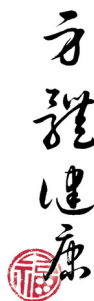
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# TWELVE

## VISIT PROTOCOL

### for Lifetime Patients

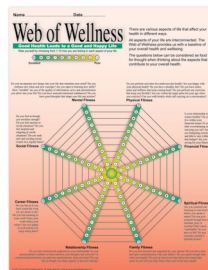
Recommit to your practice and your patients by paying close attention to our 12-visit protocol for lifetime patients.

#### PROTOCOL OVERVIEW:

- VISIT 1** Getting Started
- VISIT 2** Report of Findings
- VISIT 3** Strengthen Patient Understanding
- VISIT 4** Spread the Word
- VISIT 5** Keep in Touch
- VISIT 6** Re-evaluation
- VISIT 7** Seasonal Health
- VISIT 8** Giving Thanks
- VISIT 9** MD Collaboration
- VISIT 10** Asking for Referrals
- VISIT 11** Wellness Care
- VISIT 12** Recommendations for Future Care

## GETTING STARTED

The first visit is about gathering ALL diagnostic criteria and getting a snapshot of your patient's health. With their admitting paperwork, you will gather information on their main health symptoms and signs. You may also want to include a Web of Wellness. This will provide you with a snapshot of your patient's overall health. It helps you to gather an understanding of the various aspects of their life that can be contributing to potential health problems. Making sure your patients have a general understanding is key to their treatment success. Patients may say you have answered all of their questions, but it is important they have some information in hand to refer to. Do not let them leave your office empty handed!

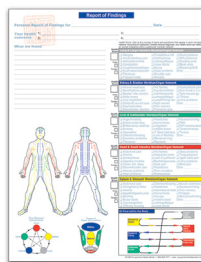

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Send all new patients home with the Acupuncture Questions & Answers brochure. This brochure answers commonly asked questions about acupuncture with simplicity and ease. Especially after their first treatment, patients may forget to ask you certain questions. The Q&A brochure will help fill in the gaps until their next visit.

Speaking of their next visit, don't forget to tell them when they come back you will be going over what you found during their first visit, and you will present to them their unique and comprehensive Report of Findings. This will list what you found, what is wrong with them, what you will do to help them get well and stay healthy, how long

it will take and how much it will cost. The above, "what's and how's" are an essential part of the Report of Findings, and need to be answered in detail so your patients can develop a clear understanding of what they will experience at your clinic.


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An often overlooked detail in patient protocol is the welcome letter. It is very important all of our patients feel a warm welcome. Let them know you are grateful that they are including you in their healthcare goals. Mailing out a welcome letter or postcard immediately after their first visit is a gesture they will truly appreciate.

Also, don't forget to cultivate the relationship between those who are referring you new patients as well. Sending a thank you letter or postcard to those individuals and doctors is necessary to keep the relationship and your practice thriving.

If you are not currently doing a Report of Findings or something similar, you are missing a key component in patient understanding, education and retention. Presenting a Report of Findings is one of the most important patient communication pieces in their health care puzzle. It also adds a level of professionalism that will answer the four main questions that ALL patients have, putting your patients at ease.

The four questions that all patients have, that they may not ask are:

1. What's wrong with me?
2. How long will it take?
3. How much will it cost?
4. Will my insurance cover it?

As a practitioner, you should answer these questions as thoroughly as possible. When you do so, your patients will have a better understanding of their care with you and you will help shape their expectations in both the number of treatments and the cost of care.

The more effort they see you putting into their care, the more likely they are to go the extra mile with their own health care commitment. The Report of Findings sets out in detail what you found during the initial exam and visually shows where their imbalances exist. By means of a symptoms/signs checklist, organized according to Meridian/Organ Network, patients get a visual of which network is out of balance and how it is affecting their entire body.

The Report of Findings also comes in handy upon re-examination so patients can see their improvement. By having a visual of a reduction in symptoms, patients can literally see the progress they are making with your treatment plan.

**Report of Findings**

Patient Report of Findings for: \_\_\_\_\_ Date: \_\_\_\_\_

Your health is \_\_\_\_\_

What are you feeling? \_\_\_\_\_

Body Diagram: Front and back views showing meridian lines and organ locations.

Checklist of symptoms/signs organized by meridian/organ network:

- Meridian 1:** [List of symptoms/signs]
- Meridian 2:** [List of symptoms/signs]
- Meridian 3:** [List of symptoms/signs]
- Meridian 4:** [List of symptoms/signs]
- Meridian 5:** [List of symptoms/signs]
- Meridian 6:** [List of symptoms/signs]
- Meridian 7:** [List of symptoms/signs]
- Meridian 8:** [List of symptoms/signs]
- Meridian 9:** [List of symptoms/signs]
- Meridian 10:** [List of symptoms/signs]
- Meridian 11:** [List of symptoms/signs]
- Meridian 12:** [List of symptoms/signs]

**Care Plan & Financial Policy**

Initial Date: \_\_\_\_\_

Timeline: [Visual timeline showing treatment dates and maintenance dates]

Checklist of insurance coverage:

- ☐ Health Insurance
- ☐ Medicare/Medicaid
- ☐ Private Insurance
- ☐ Other

Section for patient and practitioner signatures and dates.

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## Care Plan & Financial Policy.

This is the second part of the Report of Findings visit. This is where you explain the steps of care and lay out your treatment plan. Writing out treatment goals for your patients is another way to show your commitment to the process. Patients want to know what they can expect and most of all they want to know how long it is going to take and how much it is going to cost them. The Care Plan & Financial Policy answers those questions and enables you to present cohesive care instructions.

Setting up a new patient folder (for patients to take home) includes their copy of the Report of Findings, the Care Plan & Financial Policy and the Steps of Care Brochure. This will ensure they have the entire component they need for patient success. They are informed, educated and can now concentrate on getting healthy through acupuncture.

As acupuncturists we are here to treat the ills of the world one patient at a time, but I have always felt that one of the main goals of our profession is to educate those that seek us out. As most of us know, acupuncture (the needling part) is just one aspect of the care we give. I have come to learn, over the years, that educating my patients about self-care techniques or things they can do in between treatments keeps them committed and excited about following the suggested care schedule. Not to mention getting them better faster and creating more referrals.

By educating our patients about Traditional Chinese Medicine and acupuncture we deepen their understanding and respect not only for this ancient medicine, but for their bodies as well. This empowers them to take better care of themselves. Patients that have more knowledge about how acupuncture works and realize the physical connection will start to make changes in their lives in order to lead a more balanced, healthier existence. Suggested lifestyle changes coupled with your treatments will in turn help them heal faster and enable them to spread the word to their friends and family more rapidly.

Most patients are aware acupuncture can help with various types of painful conditions. Few are familiar with its far-reaching benefits. An easy way to educate your patients about their condition, and how acupuncture is an effective treatment is with the use of our symptom specific education cards.

### **Patient ducation has never been easier!**

We have 29 different education card titles to choose from, explaining how acupuncture can address specific conditions. Another excellent way to get patients involved, care compliant and educated, is by using our Meridian Organ Sheets. These sheets provide valuable information about the function of the organs/Meridian systems according to Eastern and Western medicine. They also include foods to add or avoid and easy at-home exercises and acupressure points. Use them for self-care suggestions, and as a prescription pad to get your patients actively involved in their treatment.

So, on your patient's third visit they should not leave your office without the corresponding education card reflecting their symptom imbalance, and the corresponding Meridian Organ Sheet to stimulate their role in the healing process.

Don't forget to have a selection of education cards in your office. Maybe you have a practice



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specialty or have had particular success with certain conditions. Always keep in mind, everyone knows someone who can benefit from acupuncture treatment and setting up your office accordingly will increase your flow of patients. Having a selection of informational cards about the wide array of conditions acupuncture can treat is a great way to get friends and family referrals.

Also, don't be afraid to ask for referrals. Sending your patients home with a few Top Eight Reasons to try acupuncture bookmarks with your business card inserted into the slots is a great way to get new patients. Ask your patients to hand them out to their friends. Include a special "refer a friend" offer of your choice.

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New patients come from either external or internal sources. External sources are screenings, marketing and promotional advertising. Internal sources are word- of-mouth referrals.

Word-of-mouth advertising is fantastic for many reasons:

1. It's free.
2. It's quality advertising. Patients who talk highly about you to others, like you and what you do.
3. Referral patients are "pre-qualified" because they are already engaged, committed, and willing to try you out.

### **Here are a few ways to increase referrals:**

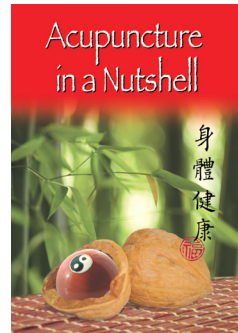
- Be present and deliver. You need to be clear, honest and inviting in your energies. Be a good communicator; be positive and uplifting. Make it a fun experience for your patients.
- Make your clinic inviting. It can be a turnoff to enter a practice and find it unappealing or out-of-balance in its energies. Employ some feng shui tips to enhance the waiting room. Cultivate the Qi rather than dispersing it or blocking it.
- Ask your patients for feedback. During your treatment with them, when you are feeling their pulses, or palpating points, ask them what they think of the practice and the care they receive. This will engage them and get them invested in your practice.
- Let patients know you want to grow your practice. They are returning to your practice because they're happy with their results. However, they only see you in their particular time slot; they may not realize you have time to see more patients. Let them know you "have expanded room to help others like themselves to get better faster," and ask them to spread the word to their family and friends.
- Rehearse your words. Since you want patients to spread the word about you, you should know what to say and how to say it. Develop and practice scenarios that allow you to be comfortable asking patients for a referral when the opportunity presents itself.

- Supply your patients with what they need in order to be referral machines. Educating your patients gives them the knowledge and ability to pass on the benefits of acupuncture. Make sure they have good resources when it comes to referring other people. Providing “refer a friend” materials to patients will keep a constant stream of new patients in your office.
- Refer out. You may find there are therapies outside of your office that will be useful in the treatment of certain patients. By showing a deeper sense of caregiving for your patients they will gain trust and an even greater appreciation for you. Those who give a lot, get a lot.

On a patient's' fourth visit, make it a habit to provide materials they need to refer others to your office. This is definitely one of those techniques that falls into the “more you give, the more you get” category. The turnaround time isn’t going to be fast, but if you do it consistently you will reap the benefits. Make sure your patients are always armed with a few Acupuncture in a Nutshell brochures, Health Passes offering free, 15-minute consultations and Referral Stimulator cards. These are a sure way to become successful as a referral-based practice. Don’t forget to insert your business card or stamp your contact information on the back. Keeping in touch is a large part of patient success as well. Reminding them they’ve made a great choice in healthcare and you are honored to support them along the way is a wonderful way to show your patients you truly care.

On their fifth visit, mail them a Healthy Reminder postcard with a personal message of continued care encouragement, and a reminder that on their next visit you will be conducting a re-evaluation to assess their progress and make any treatment recommendations or adjustments. A re-evaluation is a necessary part of your treatment plan because it gives you the opportunity to take a closer look at individual patient care and make sure you are doing everything you can in order for your patient to get the results they are looking for and the balance their body needs.

Just as you have the proper tools with which to practice, give your patients the proper tools with which to refer. Don’t be afraid to ask for referrals. Take advantage of those times when your patients say “I was telling a friend about you the other day.”



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of your

So, you have been treating your patient for approximately six to seven weeks, once per week. There comes a time when you should re-visit what their initial complaints were. This is the re-evaluation period.

It's important for two reasons: one, it allows you as a trained practitioner to assess and carefully evaluate their progress. And two, it allows your patients to evaluate and acknowledge their health progress. Ultimately, it's to see what has and has not changed.

After six or seven visits, you should see some shift in your patient's health. But if not, you may consider changing the care plan, or referring them for a second opinion. The re-evaluation period is the perfect time for both you and your patients to make the next decision about their health care.

I usually give my re-evaluations after the eighth visit. I take their initial report of findings, and the new, blank report of findings I fill out during the re-evaluation, and compare them side-by-side. I go over every symptom they initially presented with and ask them if they are still experiencing any of them. If there has been no or little improvement in a symptom, I again put a check in the box. If their symptoms have slightly improved, I put a "7" in the box, indicating "half" or "reduced" frequency. If their symptom has resolved enough for them to say they don't have it anymore, I'll put an "x" in the box. It may sound confusing, but it makes sense to me. Finding your own, consistent, way of charting is key to a successful report of findings.

My goal is to see what changed and to show them where their changes are. I'm sure you know plenty of patients who easily forgot about their symptoms when they're no longer experiencing them. I know I do! That's why re-evaluations are important, because it brings their attention to what has not changed, but more specifically what HAS. From there you both decide what the next care plan schedule is. If there's improvement that I am satisfied with, maybe I'll have them reschedule for two or three weeks out, so I can see if what we accomplished in the relief phase of care is holding. Or maybe I need to see them a bit more frequently. You're the practitioner, you know best as to what to suggest.

When patients acknowledge their improvements under your care it validates the time and energy they spend coming in to see you. When you visually show them the improvements they are happy because they are not spending time worrying about the symptoms they are experiencing.

So, doing a re-evaluation isn't just for keeping great records, it's also to remind your patients of the value of acupuncture.

After you've been in practice for a few years, you'll notice that year by year your inactive patient file gets bigger and bigger. People move away, move on or just drop off the map for a little while. It's easy to let your inactive file get out of control. For me, after being in practice for 14 years, my inactive file is quite a bit larger than my active file. After six months to a year most practitioners would put these files in storage, but if you decide to follow the way of the average practitioner, you are missing out on a large piece of your practice success.

Think about it. You have already put a lot of work into these patients, and for one reason or another you have lost touch with them. Instead of filing them away to collect dust, how about putting some Qi into getting them back into your office? Make a fun weekend of it. Enroll your staff in a "reconnection effort" to get some of your old patients back. Your inactive patients are a gold mine, just waiting to be tapped.

## How do you do this?

Simple. Make an effort to get in touch with them. Here's how:

- Send a seasonal/quarterly newsletter - Electronic newsletters or printed newsletters are perfect vehicles for keeping in touch and reminding your patients about the benefits of an acupuncture treatment
- Send postcards - Simple postcards can do the trick without investing much time or money. Use them to communicate upcoming sales, new products, or simple reminders of your services and the value you can offer
- Send thank you notes - Thank your patients for entrusting you with their care. Thank them for each patient they refer
- Send birthday greetings
- Send letters "We Miss You," or "We've Been Looking For You Letters"
- Set up a Facebook page for your practice
- Send emails with useful information pertaining to patient needs, acupuncture research, articles or upcoming lectures they may be interested in



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Think about keeping in touch through clinic announcements and events like these:

- A health care class
- A patient appreciation day
- An acupuncture happy hour where you offer the 20202 Technique
- An art show
- A mini concert with a local musician
- A seasonal tune up

These are all great ways to keep you on your patient's mind. They need to know that you are always there for them, so in times of need they know where to turn.

Always use the three C's when keeping in touch:

**Competence** By providing relevant knowledge and expertise to your patients, they value your competency.

**Concern** The more you keep in touch, the more they understand your genuine concern for their health and well-being.

**Consistency** Actions speak louder than words. By sending them consistent information, they understand you are there for questions and concerns.

You may not want to do the legwork, but as the saying goes, "out of sight, out of mind". Patients have a tendency to forget about us when they are symptom-free, or too busy in their personal lives. It is our job to gently remind them of us when we can.

# VISIT 9&10

## MD COLLABORATION & ASKING FOR REFERRALS

Visits nine & 10 are all about referrals. Your patient is coming to the end of their initial treatment plan, and they are experiencing the benefits of acupuncture. You have to agree they have most likely told their friends, family and their primary care provider about the positive experience and wonderful treatment they are receiving. Now is the time to make sure all of those people have your information.

Make sure this happens by sending your patient home with three to five special offer coupons to hand out to their friends and family. This can be anything from gift certificates or health passes to free consultation coupons or Acupuncture in a Nutshell booklets stamped with your information and an offer. You can even use some of the brochures you have in your office. Just create a patient referral drive sticker or stamp explaining the offer and place them on the brochures. Always make sure your contact information is on anything you hand out.

Also, don't be shy about asking your patient if you can contact their primary care provider to let them know how well they are doing under your care.

A few weeks ago we gave you tips on how to maximize MD referrals and begin bridging the gap between the two medicines. Here is a brief recap.

### **Establish trust:**

Doctors want to know if they refer patients out, they aren't going to be "stolen." It is important for you to stress you are seeking to establish a cooperative and professional relationship for the community and their patients. Develop trust and communication with your MD network by assuring them you want to work as a team, and not steal their patients.

### **Ask for opinions:**

Find a network of local MD's whom you can refer to. Every once in awhile ask them to provide you with a second opinion for specific patients, especially the ones that may not be responding the way you would expect. Let them know you are seeking their professional opinion and provide them with SOAP notes of what you have been doing and your diagnosis.

### **Educate them:**

Most MD's are aware that acupuncture is helpful for painful conditions. Many of them, however, are not familiar with its far-reaching benefits. Schedule some time to give a presentation. Come prepared with studies and examples of acupuncture's extensive benefits and how it can help their patients. Provide them with clinical studies relevant to what they and you treat on a daily basis. Invite them and their staff in for a free exam, or happy hour treatment.

Make it easy for them to refer to you by providing them with a personalized referral pad with all of your contact information on it.

Use our step by step “Maximizing MD Referrals for Practice Success” e-book. Get an in depth look at what you need to do to successfully become the “go-to” acupuncturist in your area

Or connect with your local MD by giving them a PowerPoint presentation called a “Lunch & Learn.” This is a great way to meet the MD and their staff and give them a brief presentation about you, your clinic and acupuncture care.

Have fun becoming the go-to acupuncturist for your local MDs!



So it's getting close to the end of the 12 visit protocol tips. Hopefully your patients are feeling better and have noticed an overall improvement in their physical and emotional signs and symptoms. At this point you, and your patients may be wondering what comes next in their care plan. Well, if indeed they are much improved, you have the opportunity to convert them to wellness care minded patients.

Ask yourself a few of these questions:

- Is my patient familiar with the importance of wellness care?
- Have I educated them enough about what wellness care is and how they need to nurture their bodies like a gardener nurtures his crop?
- Do my patients even know acupuncture is a powerful health care modality to keep them well and healthy, rather than to just treat disease and illness?
- Do my patients know they should come in for an acupuncture tune-up?"

These are important questions to help get your patient's thinking about acupuncture as a wonderful tool to keep them healthy.

In his book, *The Wellness Revolution*, Paul Zane Pilzer points out that \$1.5 trillion dollars are spent on healthcare in what he calls the "Sickness Industry".

He estimates that by 2010, \$1 trillion dollars will be devoted solely to products and services designed to keep us healthy, make us feel stronger, look better and prevent disease.

The power of acupuncture and TCM, can do just that.

It's important to let our patients know that too! How often do you share the Wellness model with them? Here are a few ways to help generate the idea of wellness.

**Plant the Seeds** When new patients call, ask them if they are calling for a specific problem or for wellness care

**Wellness on display** Create a bulletin board with the heading "Wellness Board" and display articles, pictures and other things that project and talk about health and wellness

**Educate about wellness** Make sure your patients have a full understanding of what acupuncture is and that it is not only used for acute conditions. Let them know that the ultimate goal is to get them to a place of being healthy, well and pain-free for life

**Lifestyle centered** Inform your patients that they can make specific lifestyle changes to get and stay on the road to wellness. Talk to them about Tai Chi, Qi Gong, meditation, the Inner Smile, etc.

Let them know that wellness is not about lack of symptoms and signs. Wellness is about feeling their optimal best. When your patients have a clear understanding of wellness, you will then need a tool to measure it. It is not enough to say that as acupuncturists we understand health and wellness, our patients need to understand it and measure it in their lives.

Show them you care about their health and you want to help them monitor their progress as they travel on the road to wellness by using the Web of Wellness clinic form, along with the Wellness brochure and Wellness presentation folder.

Many patients will come in for treatment and once they undoubtedly start feeling better will think that's it, they don't need any more treatment, unless you instill in them the concept of wellness care and viewing their body as a garden. In this way they will realize that by maintaining regular acupuncture treatments, twice a month, once a month, once every two month, whatever you decide together, they are keeping their bodies' strong and will be giving their system the best chance to fight off outside invaders and sickness.

Familiarizing your patients with wellness care and acupuncture for preventative measures is a great way to ensure they will come in for treatment every now and again instead of disappearing after their initial treatment plan.

We have made it to the final step in the 12 Visit Protocol for Lifetime Patients.

This patient protocol is designed to help you efficiently educate patients, encouraging them to shift their health paradigm from symptom care, to wellness and preventative care. Paving the road toward patients for life!

By incorporating these steps into your practice you can effectively change the mindset of many of your patients. Moving them from the idea acupuncture is only a remedy for acute care, to an understanding it is a safe, natural, effective and viable modality for continued health and well-being.

I have used the 12 visit protocol in my clinic for years and have found the patient education process improves, patient retention goes up and referrals are greatly increased. The main benefit is that it helps create structure by standardizing your patient education procedures.

The final 12th step is an important one. It is when you conduct a re-evaluation and make your recommendation for future care. Here's what I do:

1. I use the initial Report of Findings from their file and a new one to fill out during the re-evaluation, for comparison.
2. I go through their initial signs and symptoms one-by-one from the initial report, see what has or has not changed and mark it accordingly on the new Report of Findings.
3. I tally up their health score and make a suggestion on a new care plan.  
If they have shown significant improvement and their initial complaint has completely resolved, I will suggest they choose a treatment schedule of once a month. This is designed to allow you to monitor their symptoms, making sure they are maintaining their health. If after one month, they are still maintaining health, I recommend they come back once a month, for four months. This is to make sure they continue feeling healthy and staying well. I urge them not to hesitate to come in for a "tune up" if they feel the slightest change in their health.
4. I then allow them to make the choice to preserve the beneficial changes that have taken place and move forward toward treatments that are focused on prevention.

This is also an excellent time to share the concept of wellness care with them. Shifting their mindset, once again, from acupuncture not only for acute conditions, but for long-term preventative medicine as well.

At the end of their session, I will ask them how they feel, on a scale from 1-10, compared to when they first came in. When they reply they are closer to feeling a “10,” I make sure they know that wellness treatment can help keep them feeling their best.

## HELPFUL RESOURCES:



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Not all websites are created alike. We are not talking about colors and design here, we are talking about the features that give a website the power to convert lookers into buyers. According to Google, on average people spend less than 60 seconds on a website they first land on. If there isn't anything that keeps their attention, off they go.



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