



MASTERING ETHICAL SALES

Pre-Sales – AKA “Setting the Table”

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Why “Pre-Sale”?



Purpose of Pre-Sales:

- Build rapport with patients before the consultation.
- Educate patients to prepare them for the consult.
- Streamline the decision-making process during the actual consultation.

Importance of "Setting the Table":

- Helps patients feel informed and comfortable.
- Saves time during consultations.
- **Increases the likelihood of a successful treatment plan commitment.**

Print Materials To Show and Share




Purpose:

Provide patients with educational materials to set expectations and communicate the value of services.

Examples of Materials:

- Brochures: Outline services, treatment benefits, and patient testimonials.
- Pricing Sheets: Offer transparent pricing information to reduce concerns.
- FAQ Handouts: Address common questions about treatments.
- Visual Guides: Diagrams or infographics explaining procedures (e.g., IV therapy, regenerative medicine).

Sample: Handout



WHAT IS OZONE? THE MOLECULE BEHIND THE THERAPY

Ozone exists naturally in the world, usually occurring in the upper atmosphere (the stratosphere). The Sun's UV light breaks apart the O₂ (oxygen) molecules into single molecules, which some rejoin into O₂ again while others bind together to form O₃ (ozone). And it's these ozone molecules that create the ozone layer, which is the protective barrier from the Sun's harmful UV rays.

We can also create ozone "manually" through devices called ozone generators. There are many applications for its use. It is a powerful and efficient disinfectant, sterilizer, and detoxifier for water, air, and surfaces. It works three thousand times faster than chlorine and is a thousand times more powerful than bleach. It cleans mold, fire and flood-damaged areas, and wastewater treatment and even removes pesticides. Many industries have discovered the value of ozone.

In the early 1800s, Nikola Tesla and other scientists questioned ozone's potential for medical applications and purposes. However, ozone posed a challenge as it is a very reactive gas. As a result, it is not compatible with many materials, like certain metals and plastics, and breaks down quickly. So there were variations of the first ozone generators. And then, they performed tests to see the ozone response to the body.

And over the last 200 years, many countries worldwide have used ozone consistently for medical purposes. It is incredibly safe and effective with minimal side effects. It is a very cost-friendly



treatment as well as simple to administer. Ozone has been well researched and documented as a valuable tool in treating and eradicating over 134 chronic and autoimmune disorders and is considered 60-90% effective when looking at all medical applications with very few contraindications.

While the FDA in the United States has not approved ozone, it has passed it through phase I and phase II trials deeming it "safe and effective."

Approved devices manufacture medical-grade ozone using pure oxygen and then exposing it to an electrical charge via a corona discharge. Like the Sun's UV light in atmospheric ozone, the electrical current separates the O₂ molecules to reform into O₃. The O₃ molecules share an electron which makes them unstable. This instability causes O₃ to break apart when introduced to the body, forming the stable O₂ and a wandering O molecule. This wandering molecule creates a multitude of biochemical reactions which can result in positive health benefits.

Some main benefits for ozone treatments are:

- Ozone is a significant immune modulator and helps balance the immune system if it is deficient, struggling, or overactive such as in an autoimmune condition.
- Ozone is an excellent vasodilator and stimulates better peripheral and circulation to enhance oxygen and nutrient delivery through the red blood cells.



Immune System YOUR MAIN LINE OF DEFENSE

Your best protection against illness doesn't come from prescription drugs or injections, but from your own body's first line of defense—the different cells and organs that make up your immune system.

Without your immune system, you'd wake up each morning covered with mold or blisters, and a simple cold would kill you. You would have to live in a sterile bubble to survive. You would never be able to touch a loved one, watch a good movie in a theater, or walk through a park on a sunny day.

There are few systems in nature as complex as the human immune system. When there is an attack on your body—whether from an airborne virus, a bug bite, or a cancerous cell—your immune system mobilizes a specific, coordinated defense. Some cells mark suspicious microbes or organisms with a chemical to identify them as a threat, and other cells come in and take care of business by devouring the invaders or blasting them with toxic chemicals. It's brilliant!


Your immune system learns and adapts — and runs automatically! However, no matter how complex and brilliant your immune system is, it is not infallible and you do get sick. Maybe a virus gets waft up your nose and burrows into your lungs, causing you to get a fever, sore throat, or a stuffed up nose. Or perhaps bacteria might sneak into your stomach from contaminated food, causing diarrhea and vomiting.

Most of the time your body fight this. If you cut your finger with a knife, the area swells as damaged cells release distress chemicals that trigger the cascade of chemical events known as inflammation. While these responses cause discomfort or pain, they are a signal showing that the defense systems are working.

Lines of Defense

Your immune system consists of several different systems, each with a purpose and function.

- **Innate or passive system** — built-in protection. You are born with this defense. Infants receive protective molecules called antibodies while in the womb and through the mother's milk after birth. The innate system also includes your skin, specialized cells, and mechanisms like inflammation, cough reflex, and fever. It is the first line of defense—general responses that should happen no matter what.
- **Adaptive system** — learned protection. Unlike the innate or passive system, the adaptive system has a very long memory. It remembers each of the millions of antigens it encounters, from the time you were born to the time you die. It develops a specific response to each one, allowing you to get sick only once from a particular virus strain. The next time your body encounters the virus, your immune system is ready with the appropriate defense.



Sample: What To Expect



OZONATED SALINE IV

What To Expect

INTRODUCTION

Ozonated saline IV therapy is an innovative and natural treatment designed to improve oxygen delivery, enhance immune function, reduce inflammation, and support detoxification. If you've decided to undergo this therapy, this guide will help you understand what to expect before, during, and after the procedure to ensure a smooth and effective treatment experience.

BEFORE YOUR OZONATED SALINE IV THERAPY

- 1. Initial Consultation:** Before starting treatment, your healthcare provider may perform a thorough consultation to review your medical history, discuss your current health concerns, and determine if ozonated saline IV therapy is right for you. During this session, you may be asked about:
 - Any medications or supplements you are taking
 - Pre-existing conditions like hyperthyroidism, anemia, or bleeding disorders
 - Any known allergies or sensitivities to saline or ozone
 - Your goals for treatment, such as managing chronic conditions, boosting immune function, or improving energy levels
- 2. Hydration and Nutrition:** It is important to be well-hydrated before your treatment. Drinking water the day before and the morning of your session will help the IV process go more smoothly. Your provider may also recommend eating a light meal prior to your appointment to avoid dizziness or nausea during the infusion.
- 3. Dress Comfortably:** Wear loose, comfortable clothing with sleeves that can easily be rolled up for IV access. You'll be seated for the duration of the procedure, so comfort is key.

- 4. Avoid Heavy Exercise or Stress:** In the hours leading up to your treatment, avoid any intense exercise or stress, as your body should be in a relaxed state before the IV therapy. This will allow you to experience the full benefits of the treatment without feeling overstressed.

DURING YOUR OZONATED SALINE IV THERAPY

- 1. Starting the Procedure:** Upon arrival, you'll be seated comfortably in the treatment room. A 22-gauge catheter will be inserted into your arm for IV access. The process is generally painless, although you may feel a slight prick from the needle.
- 2. Ozonation of Saline:** During the session, a sterile saline solution (normal saline or NS) will be ozonated using an ozone generator. Medical-grade ozone gas will be bubbled through the saline for approximately 10 to 20 minutes, depending on your treatment plan.
- 3. The IV Infusion:** After ozonation, the saline will be administered to you intravenously. The entire IV drip process typically lasts between 60 to 90 minutes. You can relax, read, or listen to music during the infusion. Most patients find the experience to be calming and restful.
- 4. What You Might Feel:**
 - Some patients report feeling a mild sense of warmth or tingling as the ozonated saline enters the bloodstream.
 - Many feel an increase in mental clarity, relaxation, or energy during the procedure.
 - Rarely, some patients may experience slight light-headedness or mild discomfort. Let your provider know if you experience any discomfort so adjustments can be made.

PROCAINE: WHAT TO EXPECT

Instructions for Patients Receiving IV Procaine Infusion

1. Preparing for Your IV Procaine Infusion

Proper preparation is key to ensuring a smooth and comfortable experience. Follow these guidelines before your infusion:

- **Hydrate Well:** Drink plenty of water in the 24 hours leading up to your infusion. Being well-hydrated helps your body process the procaine more effectively and makes IV insertion easier.
- **Eat Lightly:** Have a light, balanced (protein and fat) meal 2-3 hours before your appointment. Avoid heavy or greasy foods, as these may cause nausea during or after the infusion.
- **Avoid Caffeine and Alcohol:** Refrain from consuming alcohol or caffeine on the day of your infusion, as these can interfere with how your body responds to procaine.
- **Medications:** Inform your healthcare provider of all medications and supplements you are taking. Certain medications (such as sulfonamides) may interact with procaine. Your doctor may advise you to temporarily stop some medications prior to the infusion.
- **Wear Comfortable Clothing:** Choose clothing that allows easy access to your arms for IV insertion. Dress comfortably, as you may be sitting or lying down for the duration of the infusion.
- **Arrange Personal Schedule:** You may feel lightheaded or tired after the infusion. Please give yourself a 30 minute buffer before your next destination.

2. What to Expect During the Infusion

The IV procaine infusion process is typically straightforward and minimally uncomfortable. Here's what you can expect:

- **IV Insertion:** A nurse will insert a small catheter into a vein in your arm to administer

the procaine. You may feel a slight pinch when the IV is inserted.

- **Duration of Infusion:** The infusion itself typically lasts between 30-60 minutes, depending on the dose prescribed by your physician and how strongly you feel the effects. You will remain seated or lying comfortably during this period.
 - **Sensations During the Infusion:**
 - Some patients report mild burning or stinging at the IV site. If you experience discomfort, inform the nurse, and the infusion can be slowed.
 - You may feel lightheaded or relaxed during the infusion, which is normal.
 - Occasionally, patients may experience mild euphoria, fatigue, or drowsiness during the infusion.
 - **Monitoring:** Your vital signs (blood pressure, heart rate, and oxygen levels) will be closely monitored during the infusion. If any unusual symptoms occur, the infusion may be paused or adjusted by your healthcare provider.
- #### 3. What to Expect After the Infusion (Up to a Week)
- After your infusion, you may experience certain effects that can last for a few days up to a week. Here's what to expect:
- **Immediately After the Infusion (First 24 Hours)**
 - **Mild Drowsiness or Fatigue:** It is common to feel slightly tired or lightheaded immediately after the infusion. Resting and staying hydrated can help alleviate these symptoms.
 - **Increased Energy or Mental Clarity:** Some patients report feeling a sense of increased energy or mental sharpness. This is temporary and may last a few hours or days.



Sample: FAQs



EBOO FAQs

TUBING SET UP

1. What part of the tubing do I set up first?

The filter should be set up first. Blue end to the sky; red end to the ground

2. What is the minimum amount of fluid I need for set up and the 50 minute procedure?

You will need a minimum of 500 ml of NS or LR with 7500 units of heparin for set up and the 50 minute procedure. You may need 250 ml NS or LR to flush the blood back to the patient at the end of the procedure.

3. How do I attach the main red tubing?

You will connect one end at the bottom of the filter. You will place the larger diameter tubing in the peristaltic pump with the port on the right hand side of the pump.

4. Where do I connect the heparin line?

You will connect the heparin line to the port closest to the pump, not closest to the patient. This is a change from the original instruction. The heparin being placed here helps the pump move the blood through the tubing.

5. How fast does the heparin need to drip?

There is not a set calculation for the speed of the heparin drip. You will need to look at the pulse at the port connection. If you cannot see the pulse, the flow is too fast and needs to be decreased. If there is blood coming up the heparin line, the flow is too slow and needs to be increased.

6. What pump setting should I use?

The peristaltic pump should be set at 14 RPM (using the larger diameter of the red tubing). It can be adjusted based on the patient's blood flow if needed.

7. Can I use extension tubing on each access for the procedure?

We do not recommend using any extensions for this procedure. We recommend connecting the EBOO tubing directly to the hub of each catheter.

8. How far in advance of the appointment can I set up the tubing on the EBOO machine?

We recommend setting up the tubing before your patient arrives and then prime the tubing when your patient has arrived. We do not recommend setting the tubing up the night before a scheduled appointment. The tubing is sterile and needs to be opened close to the appointment time. Heparin in saline solution is only good for 6 hours.

PRIMING

1. When do I use the syringe to pull fluid into the chamber?

You will pull the fluid into the chamber using the syringe when fluid has passed the chamber about 10 inches or on a 3 second count using the pump or a 5 second count using gravity.

2. Which IV fluids can be used for EBOO procedure?

You can use Normal Saline, Lactated Ringers or D5 for priming and the procedure.

DO NOT USE: Sterile Water or ½ saline

PROCEDURE

1. When do I turn on the ozone?

The ozone (and oxygen) should be turned on when the filter is ¾ full with blood.

Sample: Packaging Brochure (Pricing)



THE BASICS		
Functional Medicine Consult Doctor consultation, exam, lifestyle education, endobiogenic panel	\$140	
Functional Medicine Consult Plus Basic plus IV therapy	\$202	SAVE \$23
Lifestyle Education Consult Includes nutritional recommendation, exercise program, lifestyle coaching	\$360	SAVE \$40
Lifestyle Education Package Includes 12 Lifestyle Education coaching sessions	\$600	SAVE \$15
Insufflation Basic Includes 5 insufflation bags	\$180	SAVE \$45
Neural Therapy Basic Includes 3 Neural therapy treatments	\$425	SAVE \$75
PEMF Starter Set Includes 3 PEMF sessions	\$135	SAVE \$15
PEMF Mega Set Includes 10 PEMF sessions	\$400	SAVE \$100



Patient Interview Prior To The Consult



- **Purpose:** Gather important information to personalize the consultation and treatment recommendations.
- **Steps for the Interview:**
 - **Medical History:** Understand patient background, conditions, and past treatments.
 - **Goals and Expectations:** Identify the patient's health goals (e.g., "I want more energy," "I want pain relief").
 - **Current Concerns:** Learn about symptoms or challenges the patient is facing.
 - **Lifestyle Factors:** Assess habits, diet, stress levels, and other relevant factors.
 - **Budget Awareness:** Discuss financial considerations to align recommendations with their resources.
- **Tools to Conduct the Interview:**
 - Digital intake forms.
 - Virtual or in-person pre-consult discussions.

Benefits of Pre-Sales Efforts



1. Patient Confidence

- Patients feel heard, informed, and more confident in the provider's ability to meet their needs.

2. Streamlined Consultations

- Minimizes time spent gathering basic information during the consult.
- Allows the practitioner to focus on recommendations and next steps.

3. Better Alignment with Patient Goals

- Pre-sales efforts ensure that recommendations are personalized and aligned with what the patient values most.

4. Improved Conversion Rates

- Educated and prepared patients are more likely to commit to treatment plans.

Practical Tips for Implementation



1. Prepare Your Materials

- Design print materials with clear, patient-friendly language and visuals.
- Use templates or services to create professional brochures and guides.

2. Automate the Process

- Leverage software for patient intake forms and pre-consult interviews.
- Automate follow-up emails with educational materials before the consult.

3. Train Your Team

- Ensure staff is trained to conduct effective pre-consult interviews.
- Provide scripts and checklists to standardize the process.

4. Review and Refine

- Gather patient feedback on pre-sales materials and processes.
- Continuously update resources to reflect current services and patient needs.