



1

HOW TO  
USE THE  
GUIDE

2

HOW TO WORK  
WITH HEALTH  
CARE  
PROVIDERS

3

INTRO,  
LETTER TO  
HEALTH CARE  
PROVIDER

4

HEALTH AND  
MEDICAL  
QUESTIONNAIRE

5

FITNESS  
ASSESSMENT

6

INFORMED  
CONSENT

7

CANCELLATION  
POLICY

8

STARTING AN  
EXERCISE  
PROGRAM  
PATIENT  
HANDOUT

9

YOUR  
PRESCRIP-  
TION FOR  
HEALTH

## HOW TO WORK WITH HEALTH CARE PROVIDERS: A SYSTEMATIC APPROACH

This guide will provide the fitness professional with a systematic approach for how to obtain medical referrals from physicians and other health care providers; in other words, for how to work with the medical community to increase the number of clients that you have. There are five steps:

1. Professional Preparation
2. Preparation of Marketing Materials
3. Marketing Yourself to the Health Care Provider's 'Gatekeepers'
4. Marketing Yourself to the Health Care Provider
5. Getting the Health Care Provider to Consistently Refer Their Patients to You

### **Step 1: Professional Preparation**

Develop yourself! Develop your knowledge, skills, and abilities and you'll be rewarded. You'll need a combination of formal education, recognized & respected certifications, and practical and business skills.

- **Formal education** – Earning at least a Bachelors degree in a wellness/exercise science related field will be important when working with a physician or other health care provider and will improve your chances of being noticed and respected. If you do not have a degree at the moment, do your best to attain one as soon as possible.
- **Credentials** – It's imperative that you are certified by an accredited (preferably NCCA-accredited [look at "Accredited Certification Programs" at <http://www.noca.org>]) fitness organization such as ACSM, NSCA, NASM or ACE. This will enhance your credibility amongst health care providers and optimize the likelihood of them referring their patients to you.
- **Practical skills** - Gaining practical experience from internships, seminars, conferences, and work experience is vital. Many health care providers will feel uncomfortable referring patients to you if you do not have a CPR certification. However, just make sure that these experiences are through credible organizations.

- Work Experience (corporate, club, private studios, etc.) – Working at a variety of settings will teach you more about the fitness industry. Try to get experience in a club setting, a corporate fitness center, and a private fitness studio: each will provide you with valuable skills and experiences.

### **Step 2: Preparation of two Marketing Kits (for Community Education Dept. Directors and Physicians/Health Care Providers)**

Once you've taken the steps necessary to qualify yourself academically and skill wise, as well as gained the necessary work experience, you're ready to put together the materials (often called a "press kit") that you'll use to market yourself to health care providers and those "gatekeepers" who you'll usually need to win over before you'll be able to talk to the health care providers. Place each of the following items in a professional looking binder with clear covers:

- a. For the Community Education Dept. Director:
  - Your resume.
  - Detailed job descriptions of previous work experiences, including relevant graduate teaching experience, internships for wellness or fitness programs, and any relevant articles that you have written in the past.
  - Community wellness or fitness projects that you have been involved with.
  - Testimonials from clients that you are currently working with or have recently worked with.
  - Wellness/fitness programs that you offer.
- b. For the Physician (or Other Health care Provider):
  - All of the above, plus
  - Professional liability insurance. It is recommended that you approach the organization through which you were certified for insurance information. Another alternative is to go to IDEA (<http://www.ideafit.com>) for your insurance provider.
  - An "Informed Consent" form (example form provided in this Guide).
  - A Health and Medical Questionnaire form (example form provided in this Guide).
  - A Fitness Assessment form (example form provided in this Guide).

### **Step 3: Marketing Yourself to Physicians'/Health Care Providers' Gatekeepers**

Now that you have prepared your marketing materials, you are ready to start marketing your services to health care providers in your community. A health care "community" is typically made up of a hospital, a medical plaza or medical facility of some type, and all the health care providers and staff that manage and provide care in these facilities. This health care community can range from having a staff of 1,000 employees all the way down to having only three or four employees. Hospitals and larger medical facilities, in addition to the expected physicians and nurses, will

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usually have registered dietitians, other health care professionals, and an education department that provides continuing professional education for its health care practitioners.

Two of the “gatekeepers” to familiarize yourself with between you and the physician (or other health care providers) are the Community Education Department Directors and the Physician’s/Health care Provider’s Office Manager or Front Desk Employee(s).

Take the following steps:

1. Locate the Medical Facilities in Your Community

Find out where the medical facilities are in your area and gather the following information about each one:

- Phone number and email of the Community Education department. The Community Education department may be part of the Education, Human Resources, Marketing, or Nursing departments at your local medical facilities, or it may be its own department. If you are not able to find the Community Education Department, call the facility’s main number and ask for the Community Education Department.
- Call or email the education department to find out who is in charge. This person will usually have the title of Community Education Department Director or Coordinator. Also ask what classes are currently offered by the education department.

2. Contact the Community Education Department Director/Coordinator

At this point in your professional career, meeting this director/coordinator will be one of the most important moments in your life and you must do everything you can to facilitate this meeting. Be persistent, patient and always have the mentality that you can and will help this medical facility.

1. Set up a meeting by calling and/or emailing the Community Education Department Director/Coordinator.
2. If you are unable to arrange a meeting, attend one of the education courses that the facility offers. This will give you an opportunity to meet with the facility’s health educators and potentially put you in front of the director of the department. If the Director is not at the class, try to network with one or more of the health educators to see if they can help you to meet with the director. Don’t forget to bring your press kit when you attend the class!

3. Talk to the Community Education Department Director/Coordinator

Once you are able to meet with the Community Education Department Director/Coordinator, ask them,

“Can you give me an opportunity to do a free presentation in one or more of your classes about what a difference physical activity and exercise can do to prevent and manage chronic diseases and to improve life quality? I’ll also show the class members how easy it is to incorporate physical activity into daily life?”

If the Community Education Department Director/Coordinator is reluctant to let you give a presentation, ask them,

“Is there anything I can do to be involved in your Community Education department?” This might mean that you’ll have to take part in community projects that the department is involved in. If you have to, volunteer your time!

4. Ask the Physician’s Office Manager or Front Desk Employee if You Can Leave a “Press Kit” for the Doctor.

An alternative way of getting yourself in front of the physicians/health care providers in a medical community is to directly approach each of the physician’s/health care provider’s “gatekeepers”. You’ll probably find this more difficult (and certainly more labor intensive) than if you try to market your services through the Community Education Department Director/Coordinator). Marketing your services through the physician’s office may be more successful in terms of number of referrals though. If, however, you choose this route, here’s what you should do:

What to say to the office manager/front desk employee:

1. “Excuse me” my name is \*\*\*\*\* and I am a “fitness professional” (they will not understand what a “fitness professional” is so you will need to use the specific language depending on your work setting – non-clinical (personal trainer) vs. clinical (CEP or similar). May I leave this press kit for Dr. \*\*\*\*\*? Can you please make sure you give it to him/her when you get the opportunity? Thank you.”

or

2. “Hello, what’s your name? Hi \*\*\*\*\* , my name is \*\*\*\*\* and I’m a personal trainer. I’d like to leave this press kit for Dr. \*\*\*\*\* . Can you please make sure he/she gets it? Thank you very much.”

What **not** to say to the office manager/front desk employee:

3. “Can you make sure you give this to Dr. \*\*\*\*\*?”

or

4. “I want to leave this for Dr. \*\*\*\*\* .”

5. How to Follow Up with the Office Manager/Front Desk Employee

Come back one or two days later and ask the office manager/front desk employee if they gave the press kit to the physician/health care provider. If they did and the physician/health care provider has not given you a call, ask the office manager/front desk employee for the physician/health care provider’s business card or their email address. If the front desk employee likes you, they’ll give you the information

you need to get in contact with the physician/health care provider. Sometimes the physician/health care provider's email address is not on the card and you might need to get it from the office manager/front desk employee. If they don't know, ask for physician/health care provider's direct phone number or extension.

Your next step is contacting the physician/health care provider.

#### **Step 4: Marketing Yourself to the Physician/Health Care Provider**

You've finally reached your goal: to present yourself and your services to the physician/health care provider! What follows below is a suggested series of steps to provide you with guidelines for how to best expedite this.

##### **1. When to Call the Physician/Health Care Provider**

Call during their off hours. Yes, when they are not in their office! Why would you want to do this? Because when the health care provider is in their office, their whole mind is focused on working with their patients and they don't want to get interrupted. So don't bother them during 'work' hours. Another advantage of calling during off hours is that, when leaving a message, you can really get your point across without feeling you need to hurry to get your point across.

##### **2. What to Say to the Physician/Health Care Provider**

"Hello, Dr. \*\*\*\*\*, my name is \*\*\*\*\* and I am the fitness professional who sent you a "press kit" about how I can help your patients achieve their wellness and fitness goals. I have a \*\*\*\*\* degree in \*\*\*\*\* and I am certified by one/two/etc of the most highly regarded and recognized fitness organizations in the world. I'd really appreciate it if you'd give me an opportunity to meet with you at some point to discuss the services I provide or if you'd give me an opportunity to help one of your patients achieve their fitness goals. Thanks for your time and consideration."

The physicians/health care providers that care are the ones that will call you back. You should not expect or be disappointed that not every health care provider will call you back. But accept it and move on!

##### **3. What to Do When the Physician/Health Care Provider Calls You Back**

This is your opportunity to shine. Have your press kit ready again and be ready to explain your services and, *more importantly, how your services will benefit them*, in detail. Too often, a trainer will fall into the trap of explaining their services from the trainer's point of view. This usually won't work. Think about it - the health care provider is not really interested in the great services you offer! What matters to them is how your services will benefit their practice. Be prepared to talk about this and be prepared to be specific. The critical issues here are how your services will enhance their standard of patient care and how your services will save them money or make them money. Think about these questions carefully before you talk to the health care provider and be prepared to be specific. In other words, do your

homework or you really don't deserve to be taking up the health care provider's time. Here's what to do depending on how the health care provider gets in touch with you:

If You are Contacted by Email: Email them back accordingly. Answer their questions professionally and show them how you can enhance their ability to take care of their patients. Be brief and straight to the point. Remember, the people that they refer to you will always be their patients first and your clients second.

If You are Contacted by Phone: If they leave a message, call them back as soon as possible. If you have to call them back immediately at the expense of something you were going to do for leisure, do it! This is critical. The health care provider is indicating that they are very interested in using your services, so you must do whatever it takes to make it happen.

If You are Asked to Meet with the Health Care Provider: This is the absolute best scenario, but don't expect it to happen very often! So don't get discouraged if they don't want to meet you in person – at least, in the beginning. The most important thing to do in this meeting is prove to the health care provider that you have the knowledge and skills to take care of their patients. Go over your “press kit” again and be sure to show them your medical questionnaire and how you'd use this questionnaire as part of your protocol for caring for their patient. Tell the physicians that you will always be open to their suggestions and opinions – and mean it!

Always thank the physician for their time and willingness to work with you. Also stress the benefit to their patients which in turn will impact your practice.

\*Note: Typical Sequence of Steps During a Patient's Office Visit

1. Patient Moves from Waiting Room to Health Care Room, where a Medical Assistant:
  - Measures the patient's weight and blood pressure;
  - Asks the patient their reason for the office visit;
  - Asks the patient what medications they are currently taking, and
  - Leaves the patient in the health care room, informing them that health care provider will visit them shortly.
  
2. Physician/Health Care Provider Enters the Health Care Room and:
  - Reviews the patient's chart, looking at the reason for the patient's office visit, their body weight, blood pressure, and medications being taken, as well as any other relevant historical data;
  - Checks the patient's vital signs;
  - Assesses the results of any tests made prior to the office visit;
  - Discusses any test results with the patient, and
  - Makes appropriate recommendations to improve or manage the patient's health.

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- It is during this last ("recommendation") phase of the office visit that a physician/health care provider can and should recommend exercise as a treatment solution.
- This is also the time when the health care provider would make a recommendation for the patient to consult with a health and fitness professional or other relevant exercise/sport professional.

### **Step 5: Getting Physicians/Health Care Providers to Consistently Refer Patients**

Congratulations! Let's assume that the physician/health care provider has approved your services and agreed that they will refer patients to you. What else do you need to know? The only thing left to do is to prove that you are indeed taking care of their patients. You should execute the following steps:

1. Send Monthly Updates to the Health Care Provider

Once a month, provide a brief report to each doctor about the status of their patients that you are working with. For example:

*Dear Dr. \*\*\*\*\*,*

*\*\*\*\*\* is doing really well. His wife has been telling me that when he wakes up in the morning, his left leg hardly ever hurts him anymore. He is also walking better and feeling less pain in his right hip. I will continue to work with him to better his health and will, of course, keep you posted on how he is going.*

*Thank you and take care.  
Best in health,*

\*\*\*\*\*

Note: If you can include some objective measures in the follow up to the physician, do so in simple language (i.e. pre & post amount of weight lifted for specific exercises, pre & post treadmill speed and endurance or exercise time)

Put the note in an envelope with nice paper. You might consider hand writing all your notes to the Physician. This will provide a personal touch and is likely to be more meaningful.

2. Professionally Build Your Business by Providing the Health care Provider with Your Business Brochure or with a Flyer to Put Up in their Office

This will give the health care provider easy access to your information when referring their patients to you.

3. Send a Gift Card to the Health Care Provider Whenever they Refer a Patient

Everyone likes to be appreciated. Giving the health care provider a gift card to their favorite coffee place, along with a handwritten "thank

you” note will show them that you value your relationship and that it is something that you are not taking for granted.

Having a great referral program with a physician or other health care provider will help your credibility throughout the community as well as with other physicians. But more importantly, the patient will benefit tremendously from having a credible and educated fitness professional to work with them. But working with a health care provider does not happen overnight. It is a systematic approach that will take time as you build your credibility and relationships. But the benefits more than outweigh the effort needed.