

Launching a Functional Medicine Practice From Zero to First Paying Client

How operational systems, automation, and a clear client journey generated the practice’s first paying client.

CLIENT	SECTOR	ENGAGEMENT	TIMELINE
Functional medicine practice (confidential)	Healthcare — virtual care programs	Operations strategy & client acquisition system	Launch to first revenue in six weeks

RESULTS		MEASURED FROM LAUNCH
FIRST 5 DAYS	WEEK 6	AT SIGNATURE
30	1st	\$9,900
Qualified leads Into the booking pipeline	Paying client Converted through the funnel	Approved treatment plan From a single engagement
DAY 0 — LAUNCH		WEEK 6 — FIRST REVENUE

— OUTCOME SUMMARY

Within five days of launch, the practice generated 30 qualified leads through a newly built client acquisition system. By Week 6, the funnel converted its first paying client, resulting in an approved \$9,900 treatment plan powered by an automated client journey.

IN THIS SUMMARY		
02	03	04
The Challenge & My Role	Strategy & Execution	Results & Evidence

SECTION 01

The Challenge

A practice with clinical capability and no commercial infrastructure — the constraint was operational, not medical.

CLIENT BACKGROUND

A functional medicine practice preparing to launch its first virtual program. The clinical offering was ready and the practitioner's expertise was established. What did not yet exist was any repeatable path for a prospective client to discover the practice, book a consultation, and become a paying patient.

INITIAL SITUATION

- No existing client base
- No acquisition process
- No booking workflow
- No automated follow-up
- No predictable lead generation system

STRATEGIC OBJECTIVE

Launch a repeatable client acquisition system capable of generating consultations and supporting long-term growth.

Success was defined commercially — a booked, paid client — rather than by systems delivered.

SECTION 02

My Role

Engaged to design the operating model first and configure the technology second. Every platform decision followed from the client journey, not the reverse.

RESPONSIBILITIES

- 01 Operations strategy
- 02 Client journey design
- 03 CRM architecture
- 04 Funnel strategy
- 05 Automation design
- 06 Operational workflow optimization

TECHNOLOGY USED

- **GoHighLevel**
CRM, pipeline, and booking infrastructure
- **Claude AI**
Messaging, content, and workflow design
- **Email automation**
Registration, reminders, and follow-up sequences
- **Landing pages**
Registration capture and consultation offers

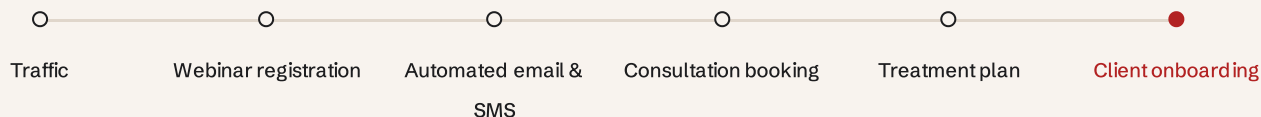
Tools were selected to serve the journey — they were not the strategy.

SECTION 03

Strategy & Execution

One continuous client journey, designed end to end. Each stage exists to remove a specific point of friction between interest and treatment.

THE CLIENT JOURNEY



01	Traffic	Creates a predictable source of attention, so demand is generated on purpose rather than by referral chance.
02	Webinar registration	Converts anonymous interest into a named contact and gives the practice a reason to follow up.
03	Automated email & SMS	Holds attention between registration and attendance — the point where most new practices lose their pipeline.
04	Consultation booking	Removes the back-and-forth of scheduling so intent converts to a calendar slot while it is still warm.
05	Treatment plan	Turns the clinical recommendation into a clear, reviewable commercial decision the client can approve.
06	Client onboarding	Protects the revenue already won by making the first weeks of care organized and consistent.

BUSINESS INSIGHT

“The systems weren’t the problem.
They already existed.
The problem was that no one was entering them.”

This project reinforced a lesson I continue to see across growing businesses. Growth doesn’t come from buying better software. **It comes from designing a client journey people actually move through.** Technology simply supports that journey.

SECTION 04

Results

Measured from the day the client acquisition system went live.

FIRST 5 DAYS

30

Qualified leads
Into the booking pipeline

WEEK 6

1st

Paying client
Converted through the
funnel

AT SIGNATURE

\$9,900

Approved treatment plan
From a single engagement

DAY 0 – LAUNCH

WEEK 6 – FIRST REVENUE

EXHIBIT A

REDACTED FOR CLIENT PRIVACY

has been approved for \$9,900 at

with

DOCUMENT	STATUS	VALUE	CLIENT
Treatment plan	Approved	\$9,900	Redacted

Approved treatment plan totaling \$9,900. Client information has been removed for confidentiality.

CLOSING REFLECTION

This engagement demonstrates what happens when operations, technology, and customer experience work together. The objective was never to build automations. It was to create a business that could consistently attract, convert, and serve clients through intentional systems.

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Helping organizations create operational clarity so they can lead, serve, and scale with confidence.