

## Business Check List – Must Be Completed Before Sales Training

1. \_\_\_ Website Access –
  - a. Username \_\_\_\_\_
  - b. Password \_\_\_\_\_
  - c. Web Developer Email and Phone \_\_\_\_\_
2. \_\_\_ Complete Patient Database (Name, Phone, and Email)
3. \_\_\_ Set up Patient Financing (HFA and Care Credit)
4. \_\_\_ Hire Staff or Assign Roles
5. \_\_\_ Order Supplements – Client Training Portal
6. \_\_\_ Order Marketing Collateral – Client Training Portal
7. \_\_\_ Set up Rooms – See Room Check On Page 3 of this document
8. \_\_\_ Download All invisa-RED® Forms & Presentations

### Staffing

**Program Director** - This person will oversee the invisa-RED® system and its implementation. All communication will funnel through the program director. They are responsible for All program implementation, training, staffing, patient care, and sales. This can also be your case manager.

Program Director \_\_\_\_\_

**Case Manager** - The most impactful role in your practice. Responsible for all new patient consultations, sales conversions, financials, patient program management, supplementation and nutrition management and orders. This person will report directly to the Program Director. (Close Deals, Report Revenue, and Track Patient Outcomes.)

Case Manager \_\_\_\_\_

**Treatment Tech** - The treatment tech must excel in leadership, motivation and communication. They are directly responsible for following the proper treatment protocols, procedures, recording and communicating patient progress. While providing program guidance this staff member must be able to navigate the relational dynamic to maintain patient compliance and success.

Treatment Techs \_\_\_\_\_

## Rules and Requirements

You will receive access to our training materials upon reviewing and signing all on-boarding documents.

Training of Usage and Certification Test must be completed with a 100% grade before receiving Certification of usage.

To receive invisa-RED® certification a 100% grade must be obtained by all staff that are going to operate the invisa-RED® device.

All training must be done through The invisa-RED® Training portal or with an authorized invisa-RED® rep.

All Training Calls will be scheduled for 60 minutes with a hard stop at the end of each meeting. They will begin promptly at the pre-scheduled agreed upon time. If you are late, the call will have to be rescheduled.

Training of Usage and Certification Test must be completed before using your Device.

For Support, Service Request / Claims, Marketing Approvals, Paid Marketing, Patient Results, Concerns, etc... EVERYTHING must be submitted through The invisa-RED® Client Training Portal under its corresponding tab. [www.invisaredtraining.com](http://www.invisaredtraining.com)

All nutritional products must be purchased through invisa-RED® client portal

Any marketing included in your purchase must be utilized within 45 days after completing your final training session or may be forfeited.

You must obtain our written consent before you use any of our Intellectual Property for marketing or share any of our Intellectual Property with others including but not limited to third party companies. (Logos, branding, content, etc...)

We reserve the right to suspend or deny all support for non-compliance to the entirety of the invisa-RED® Enterprise Growth System.

I have reviewed and agree to all information and requirements listed above. I acknowledge that the success of this program is determined by my ability to explicitly follow and implement all processes as directed.

By signing below, I acknowledge and agree that I am responsible to all outlined policies and procedures pertaining to our program model and machine usage.

Owner's Signature \_\_\_\_\_.

## Room Check List

### **Sales / Evaluation Room Set-up - ROF**

1. \_\_\_Tv or Monitor For presentation
2. \_\_\_Patient Financing
3. \_\_\_Contracts, Intake, Trackers & Packets
4. \_\_\_Way to Pay
5. \_\_\_Camera / iPad
6. \_\_\_Measuring Tape
7. \_\_\_Body Fat Analyzer
8. \_\_\_Scale
9. \_\_\_invisa-RED® Supplements
10. \_\_\_Skin Marking Pen

### **Waiting Room**

1. \_\_\_Patient Waiting Room Videos on TV
2. \_\_\_invisa-RED® Poster / Banner
3. \_\_\_Patient education Brochures

### **Treatment Room**

1. \_\_\_Treatment Table
2. \_\_\_Vibration Plate (on Rehab Floor)
3. \_\_\_Hygiene and Sanitation
  - a. \_\_\_Disinfectant Wipes
  - b. \_\_\_Trash Can
  - c. \_\_\_Paper Towels

### **Miscellaneous Items – Optional**

1. \_\_\_Fan
2. \_\_\_Foam Roll
3. \_\_\_Gowns or Bed Sheet
4. \_\_\_Storage for supplements & supplies
5. \_\_\_Pillow
6. \_\_\_Calculator