THE OPENING CHECKLIST · 1 OF 2 · LEVELS 0 AND 1

VIRTUAL PRACTICE

Level 0, under $10K: the Must lines and a license in one state. Level 1, $30K to $75K: add the Nice lines as revenue comes in.

CAPEX · ONE-TIME

MUST needed to open · NICE add when it pays for itself

LEGAL AND LICENSING

ITEM	PRIORITY	BUDGET
☐ Professional corporation	MUST	
☐ MSO, if you plan to grow	NICE	
☐ Healthcare attorney: structure, consent, telehealth rules	MUST	
☐ State licenses where your patients live Interstate compact if you qualify	MUST	
☐ DEA registration in each state If you prescribe controlled substances	NICE	
☐ Member agreement, privacy and refund terms	MUST	

TECHNOLOGY SETUP

☐ EMR with telehealth and e-prescribing	MUST	
☐ AI scribe	MUST	
☐ Patient app or portal	MUST	
☐ Subscription billing and payments	MUST	
☐ Online booking and intake forms	MUST	
☐ CRM and email	NICE	
☐ Wearable and CGM data integration	NICE	

YOUR STUDIO

ITEM	PRIORITY	BUDGET
☐ Camera, microphone and lighting	MUST	
☐ Second monitor and a quiet room	MUST	
☐ Backup internet	MUST	

TESTING WITHOUT A CLINIC

☐ At-home lab kit partner	MUST	
☐ Mobile phlebotomy partner	MUST	
☐ Imaging center for DEXA and scans	MUST	
☐ Partner gym for VO2 max and strength	NICE	
☐ Pharmacy partner	MUST	

DEVICES TO SHIP TO PATIENTS

☐ Blood pressure cuff	MUST	
☐ Smart scale with body composition	NICE	
☐ CGM starter kits	NICE	
☐ Remote monitoring setup	NICE	

LAUNCH MARKETING

☐ Name, logo and visual identity	MUST	
☐ Website with search setup	MUST	
☐ Intro video and photos	NICE	
☐ Google Business profile and physician directories	MUST	
☐ Founding member offer and waitlist	MUST	
☐ Launch webinar or live session	NICE	
☐ Referral kit for local physicians, gyms, employers	NICE	

TOTAL ONE-TIME .....

OPEX · MONTHLY

WORKSPACE

ITEM	PER MONTH
☐ Home office or coworking	
☐ Internet and phone	

STAFF

☐ Your pay	
☐ Virtual assistant or care coordinator	
☐ Part-time nurse for follow-ups	
☐ Payroll taxes and benefits	

TECHNOLOGY

☐ EMR, telehealth and AI scribe	
☐ Patient app and CRM	
☐ Payment processing fees	
☐ Cybersecurity, backup, HIPAA email	

INSURANCE, LICENSES AND FEES

☐ Malpractice in every state you practice	
☐ Cyber and general liability	
☐ License and DEA renewals	
☐ Legal, accounting and compliance	

MARKETING

☐ Content: newsletter, social, video	
☐ Search, Google Business profile, reviews	
☐ Paid ads, CRM and email automation	
☐ Podcast, webinars and events	

CLINICAL SERVICES

☐ Lab kits and mobile draws in the fee	
☐ Partner imaging and testing	
☐ Device shipping and replacement	

TOTAL MONTHLY .....

THE OPENING CHECKLIST · 2 OF 2 · LEVELS 2 AND 3

BRICK AND MORTAR PRACTICE

Level 2, $175K to $450K: one or two exam rooms. Level 3, $1M and up: a full clinic. Adjust each priority to your model and specialty, then write your number.

CAPEX · ONE-TIME

MUST needed to open · NICE add when it pays for itself

CONSTRUCTION AND RENOVATION

ITEM	PRIORITY	BUDGET
☐ Architect and medical space design	MUST	
☐ Permits, inspections, ADA compliance	MUST	
☐ Demolition and build-out Second-generation space costs less	MUST	
☐ Plumbing: a sink in every exam room	MUST	
☐ Electrical and dedicated circuits For imaging and hyperbaric	MUST	
☐ HVAC, ventilation, lighting, acoustics	MUST	
☐ Radiation shielding, state registration DEXA, C-arm, CT, MRI	NICE	
☐ Fire code review for hyperbaric	NICE	
☐ Cabling, Wi-Fi, security cameras	MUST	
☐ Signage, inside and out	MUST	

PATIENT EXPERIENCE

☐ Reception and lounge furniture	MUST	
☐ Bar, kitchen or lounge	NICE	
☐ Screens for the lounge and results	NICE	
☐ Changing room and recovery room	NICE	

BEFORE YOU OPEN

☐ Entity, MSO, attorney, licenses	MUST	
☐ Lease deposit and first month	MUST	

MEDICAL EQUIPMENT

ITEM	PRIORITY	BUDGET
☐ Medical equipment Diagnostics, imaging, therapies. Full checklist next week, in part 3	MUST	

LAUNCH MARKETING

☐ Name, logo and visual identity	MUST	
☐ Website with booking and search	MUST	
☐ Photos and video	NICE	
☐ Google Business and directories	MUST	
☐ Founding member offer and waitlist	MUST	
☐ Open house or launch dinner	NICE	
☐ Referral kit: physicians, gyms, hotels	NICE	
TOTAL ONE-TIME		

OPEX · MONTHLY

LEASE AND UTILITIES

ITEM	PER MONTH
☐ Rent and building fees	
☐ Electricity, higher with imaging	
☐ Water, internet and phone	

STAFF

☐ Your pay	
☐ Nurse or medical assistant	
☐ Front desk and care coordinator	
☐ Phlebotomy, in-house or mobile	
☐ Payroll taxes and benefits	

TECHNOLOGY

☐ EMR and AI scribe	
☐ Patient app, telehealth, payments	
☐ Cybersecurity, backup, HIPAA email	

INSURANCE AND PROFESSIONAL FEES

☐ Malpractice	
☐ Liability, property, cyber, workers' comp	
☐ Legal, accounting, compliance, licenses	

MARKETING

☐ Content: newsletter, social, video	
☐ Search, Google Business profile, reviews	
☐ Paid ads, CRM and email automation	
☐ Events, talks and physician referrals	

CLINICAL SUPPLIES AND SERVICES

☐ Send-out labs, imaging, medications	
☐ Service contracts, equipment financing	
☐ Cleaning, medical waste, laundry	
TOTAL MONTHLY	