

IV Nutrition Leadership Structure & Roles

This document defines ownership, responsibilities, and accountability expectations for each role in the IV Nutrition leadership structure. Each role stays focused on its primary function — marketing, community presence, and business development sit with the team built to own them, freeing clinic leadership to focus on operations, client experience, and staff performance.

OWNER

Primary Purpose: Set company vision, drive expansion, and hold all leaders accountable to performance and growth.

Owns:

- Company vision and long-term strategy
- Financial oversight and budgeting
- Expansion and new location decisions
- Strategic partnerships
- Clinic Director development and accountability
- Multi-location operational consistency
- Major staffing decisions
- New service and revenue growth opportunities
- Clinic performance monitoring across locations

Responsibilities:

- Coach and develop Clinic Directors through regular review and feedback
- Monitor clinic KPIs across both locations
- Identify expansion opportunities and new service offerings
- Oversee labor, inventory, and financial performance at a company level
- Hold Clinic Directors accountable for clinic performance
- Lead major hiring decisions in partnership with Clinic Directors
- Conduct periodic clinic audits and walkthroughs

MARKETING TEAM

Primary Purpose: Build brand presence, drive community engagement, and generate new client acquisition through marketing, events, and partnerships.

Owns:

- Marketing initiatives and local brand awareness
- Community events and outreach
- Corporate wellness opportunities
- Physician and referral relationship development
- Community networking and partnership development
- Content creation and campaign management
- New client acquisition strategy

Responsibilities:

- Plan and execute community events and mobile service activations
- Build and maintain physician and referral partner relationships
- Develop corporate wellness programs and outreach
- Create and manage marketing content and campaigns
- Attend networking events and represent the brand publicly
- Coordinate with Clinic Directors on event logistics and staffing support
- Track acquisition metrics and report to Owner

CLINIC DIRECTOR (CD)

Primary Purpose: Own overall clinic performance, operations, staff accountability, compliance, client experience, and profitability.

Owns:

- Clinic performance
- Staffing and scheduling
- Labor management
- Inventory management
- Compliance
- Client experience
- Staff accountability
- Revenue generation within the clinic
- Facility standards

Leadership & Accountability:

- Lead the clinic in all tasks necessary to improve performance and client experience
- Create and maintain a culture of accountability and professionalism
- Serve as the primary decision-maker within the clinic
- Develop staff and future leaders
- Conduct performance coaching and corrective action
- Manage bank deposits and register

Operations:

- Create schedules within labor budget
- Ensure leadership coverage on all shifts
- Oversee inventory ordering and management
- Maintain clinic readiness and organization
- Monitor clinic performance metrics
- Ensure operational consistency
- Assign staff roles and flow when on shift

Clinical Oversight:

- Ensure all protocols and compliance standards are followed
- Review charts and documentation
- Perform consultations and intake reviews
- Communicate with Medical Director as needed
- Maintain proficiency in all ACD and IV Technician functions
- Ensure bloodwork and clinical services are performed correctly

Business Performance:

- Drive package sales and memberships
- Monitor retention and client satisfaction
- Support the Marketing Team on event staffing and local logistics
- Lead the recapture project — understand reasoning for previous clients' departures

Delegates to ACD:

- Daily checklist verification
- Opening and closing oversight
- Day-to-day workflow management
- Staff training execution
- Daily inventory counts
- Daily compliance monitoring

ASSISTANT CLINIC DIRECTOR (ACD)

Primary Purpose: Lead daily clinic operations, staff development, clinical execution, and shift-level accountability.

Owns:

- Daily operations
- Clinical quality execution
- Staff training and development
- Daily compliance monitoring
- Workflow management
- Shift leadership

Clinical Leadership:

- Conduct consultations and intake reviews
- Review charts for completeness
- Monitor protocol compliance
- Communicate with Medical Director when necessary
- Maintain expertise in compounding and bloodwork procedures
- Serve as clinical resource for staff

Staff Development:

- Train and onboard new team members
- Identify staff weaknesses and development opportunities
- Provide daily coaching and support
- Ensure staff competency and confidence

Daily Operations:

- Open and close clinic independently
- Ensure completion of daily, weekly, and monthly checklists
- Monitor clinic cleanliness and organization
- Manage workflow throughout the day
- Maintain inventory counts and restocking
- Support scheduling needs and shift coverage
- Assign staff roles and flow when on shift

Client Experience:

- Resolve guest concerns
- Support package and membership sales
- Ensure consistent client experience
- Assist with promoting mobile services and events

Acts As:

- On-site decision-maker when Clinic Director is unavailable
- Lead operator responsible for successful daily execution

IV TECHNICIAN

Primary Purpose: Deliver exceptional client care and safely execute all clinical services.

Owns:

- IV administration
- IM injections
- Client care
- Documentation
- Treatment execution

Responsibilities:

- Start IVs and administer treatments
- Monitor clients throughout services
- Maintain accurate documentation
- Follow all protocols and compliance standards
- Educate clients on services and wellness offerings
- Maintain treatment area cleanliness
- Support inventory restocking
- Contribute to membership and package discussions
- Support clinic goals and team culture

ACCOUNTABILITY SUMMARY

Owner — Owns company success

Vision & strategy · Financials · Expansion · CD development · Multi-location performance

Marketing Team — Owns brand growth & community presence

Marketing & content · Events & outreach · Referral partnerships · Corporate wellness · Client acquisition

Clinic Director — Owns clinic performance

Operations · Staffing · Compliance · Inventory · Clinic KPIs

Assistant Clinic Director — Owns daily execution

Daily ops · Training · Workflow · Clinical quality · Shift leadership

IV Technicians — Own client care

IV administration · Client experience · Documentation · Protocol compliance