

Clinical Pivot & KPI Monitoring Tool

Client Name: _____ Protocol Start Date: _ 60-Day Review Date: _____

Section 1: Key Performance Indicators (KPIs)

Use this section to track the "20% Rule." If subjective markers haven't improved by 20% by day 60 despite high compliance, a pivot is required.

KPI Category	Subjective (Client Reported 1-10)	Objective (Wearable/Lab Data)
Metabolic	Energy: _ / Cravings: _	Avg Glucose: _____ mg/dL
Autonomic	Stress: _ / Sleep Quality: _	Avg HRV: _____ ms
Inflammatory	Joint Pain: _ / Brain Fog: _	hs-CRP (if available): _____
Hormonal	Libido: _ / Cycle/Mood: _	Basal Body Temp: _____

Compliance Check: Has the client maintained 90%+ compliance? [] Yes [] No

Section 2: The Functional Pivot Logic

Evaluate the data from Section 1 to determine the clinical direction.

Current Status (Check one): - [] **STAY THE COURSE:** Subjective symptoms are stable/slow, but Objective KPIs (HRV/Glucose) are improving. *Action: Maintain protocol for 30 more days.* - [] **PIVOT THE TACTIC:** 90%+ compliance, but both Subjective and Objective data are stagnant or declining after 60 days. *Action: Move to Section 3 (Hidden Stressors).* - [] **REDUCE INTENSITY:** Objective data is declining (HRV dropping, RHR rising) while client feels "wired but tired." *Action: Pulse doses or reduce supplement load to manage healing crisis.*

Section 3: Non-Responder Investigation (The "Big Three")

If a pivot is required, screen for these hidden physiological barriers.

Hidden Stressor	Red Flag Symptoms	Screening Action
1. Mycotoxins (Mold)	Migrating pain, static shocks, ice-pick pain, extreme light sensitivity.	[] Order Mycotoxin Urine Panel
2. Toxic Metal Load	Resistant fatigue, neurological tremors, history of dental amalgams.	[] Order Provoked Heavy Metal Test
3. Occult Infection	History of root canals, "silent" jaw pain, history of cavitation.	[] Refer to Biological Dentist

Section 4: Re-test Schedule Tracker

Ensure re-testing aligns with biological turnover rates to avoid "false" data.

- **Microbiome (GI Map):** Target Date (12–16 weeks): ____ []
- **HPA/Hormones (DUTCH):** Target Date (2–3 cycles/90 days): ____ []
- **Metabolic (Blood Chem):** Target Date (90–120 days): ____ []

Observations & Clinical Notes:

Next Steps:

[] Maintain current protocol [] Order advanced screening [] Adjust supplement dosage/intensity

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