



# HOW I THINK LIKE AN HERBALIST

A clinical orientation guide

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## Introduction

### Before the herbs

When a client sits down in front of me, I am not thinking about herbs yet. I always tell my students that this is not the first step when approaching a case; that's a very allopathic way of thinking. So first...

I am orienting.

For a long time, this was the piece I did not understand. I studied plants for years. I read books. I took classes. I memorized actions, indications, and energetics. I could name herbs for specific conditions with ease.

And still, when I sat across from a real person, I felt unsure. Like I was guessing. Like I was missing something essential.

What finally changed things for me was not learning more plants or remembering which herb was good for which condition ( I already knew that).

It was learning how to organize what I was seeing. WHAT patterns is this person presenting?

This document is not about which herb treats which problem. There are plenty of resources that already do that. This is about how I orient myself when working with people, and how clinical confidence actually develops over time.

## The Case

A client comes in with a lingering cough.

They were sick for about a week. Now the infection has mostly passed, but the cough remains.

It is producing abundant clear mucus.

They feel cold.

The cough worsens when they walk into cold air or sip cold beverages.

That's all we know.

Now we begin.

## STEP 1: IDENTIFY THE TISSUE STATE

Before thinking about herbs, I ask:

What is the pattern here?

This cough is:

- Productive
- Producing abundant clear mucus
- Worse with cold exposure
- Accompanied by a general cold sensation

This is not a dry cough.

This is not hot and inflamed.

This is **damp and cold**.

The tissue state is damp.

The energetic tone is cold.

That already narrows the field dramatically.



## STEP 2: MATCH THE ENERGETICS

Now I ask:

What kind of energetic input would move this pattern?

If I reach for mullein simply because it is a “lung herb,” I would miss something important.

Mullein is cooling and moistening.

But this client has a cough that is already damp and cold. ( Abundant mucous - damp, exacerbated by cold beverages= cold)

Adding more cooling and moistening would likely slow things down, and potentially exacerbate. The mucus may linger longer. The cough may drag on.

Instead, I need herbs that are:

- Warming
- Drying
- Moving

This is where clinical thinking replaces memorization.

I am not asking, “What’s good for cough?”

I am asking, “What direction does this body need?”



## STEP 3: CONSIDER HERBAL ACTIONS

Now I think about actions.

The cough is productive, but the mucus is lingering.

I want:

- Stimulating expectorants
- Herbs that warm the lungs
- Herbs that encourage movement

I am looking for herbs that will stimulate the bronchioles, increase circulation locally, and help move the mucus up and out.

The action is expectorant.

But not just any expectorant.

**A stimulating expectorant.**

Energetics guided that decision.

## STEP 4: BUILD THE FORMULA THOUGHTFULLY

Now I build around the lead idea.

If I choose one strong warming expectorant, what supports it?

- Is there lingering inflammation?
- Is the person depleted from being sick?
- Is digestion weakened from antibiotics?
- Is the cough worse at night?

I might add:

- A secondary expectorant
- A gentle warming circulatory stimulant
- A diaphoretic if i feel they need to sweat it out
- Something to support immune recovery

The formula is not randomly chosen or kitchen-sinked.

It is directional.

The goal is clear:

Drive the damp cold pattern up and out.

## STEP 5: MONITOR AND ADJUST

I never assume the first formula is final.

I ask:

- Is the mucus decreasing?
- Is the cough becoming less frequent?
- Is warmth returning?
- Has the pattern shifted?

If the mucus dries out too much and becomes stuck, I adjust.

If the cough becomes dry and irritating, I pivot.

Herbalism is responsive, not rigid.

## WHAT THIS DEMONSTRATES

Notice what we did not do.

We did not:

- Google “herbs for cough”
- Start with a plant
- Memorize a protocol
- Treat a symptom in isolation

We observed.

We identified the tissue state.

We matched energetics.

We chose actions.

We built a formula.

We monitored.

This is clinical thinking.

Confidence does not come from knowing every lung herb.

It comes from knowing how to reason through a pattern.

## A CHECKLIST YOU CAN USE:

### Step 1: Identify the Tissue State

Before choosing herbs, ask:

- Is this presentation dry or damp?
- Is there heat or cold?
- Is there tension or laxity?
- Is there stagnation or depletion?
- What environmental factors worsen or improve it?

Write your impression in one sentence:

### Step 2: Determine the Energetic Direction Needed

Based on the tissue state, ask:

- Does this body need warming or cooling?
- Does it need drying or moistening?
- Does it need stimulation or calming?
- Does it need movement or toning?

What energetic qualities would bring balance?

## Step 3: Choose Herbal Actions (After Energetics)

Now think in terms of actions:

- What primary action is needed? (expectorant, nervine, bitter, etc.)
- Should that action be stimulating or relaxing?
- Are there secondary actions that support the primary goal?

Primary action:

Secondary actions:

## Step 4: Build the Formula Thoughtfully

Before finalizing, ask:

- What is the primary goal of this formula?
- What is the lead herb doing?
- What supports the lead herb?
- Are there accompanying symptoms that need gentle support?
- Is the formula too strong or too weak for this person?

Formula intention in one sentence:

## Step 5: Monitor and Adjust

After implementation:

- Is the primary symptom shifting?
- Has the tissue state changed?
- Is the body becoming more regulated?
- Has a new pattern emerged?
- Does the formula need to be adjusted?

Next adjustment plan:

Do not start with the herb.

Start with the pattern.

Match the energetics.

Choose the action.

Build with intention.

Monitor.

Confidence comes from reasoning, not memorization.

There is no honest way to teach formulation in a short PDF. I do not even introduce formulation in the first year of my program. What I can guide you through instead is the reasoning process that makes good formulation possible.