

Structures and Systems for Effective, Profitable, Sustainable Holistic Health, Fitness, or Coaching Business.

As a business coach, these are the physical business growth topics, structures and systems I work with professionals to create, implement, execute on and master. Use this as a check list for yourself in starting to do the work of building your business. If you are a startup and have not yet launched your business, then there are additional structures and process not covered in this particular growth check list structure.

- Documented/Written Goals with specific measurable elements and a completion/by-when date.
 - Annual Goal setting process.
 - Bi-annual business check up.
 - Monthly and weekly goals documented, then measured and tracked.
- Financial forecast and time-line documented. Projection of income across 12 months.
 - Revenue Streams determined with number of sessions sold projected across 12 months.
- Calendar schedule with
 - Specific blocked times you are working on clients in an electronic calendar.
 - Specific blocked times for working on your marketing, finances and other business related actions recurring out in an electronic calendar. Includes start of business day and end of business day boundaries.
 - Blocked time for personal stuff – Yes this is very important too.
- Business and Personal Budget. Expense projection as well as spending and savings plan.
 - Blocked time in calendar to work on budget and interact with it weekly/monthly.
- Financial Management Systems
 - Bookkeeping software program.
 - Schedule for paying bills, making deposits, reconciling bank accounts.
 - System, process, schedule for making entries into bookkeeping software: expenses paid; income in; money transfers, bank reconciliations, etc.

- Schedule and amount for paying yourself.
 - Develop relationship with bank and banker.
 - Print out financial statements monthly such as Profit and Loss statements; evaluate for any necessary decisions or actions.
 - Develop relationship with CPA or tax accountant; set up at least 2 annual meetings for tax strategies.
- Determine and document Target Market and Ideal Client.
 - Marketing plan set up with strategic goals aimed at Ideal Client and Target Market
 - Word of Mouth Marketing plan
 - Referrals
 - Referral Conversations
 - Write scripts
 - Practice and memorize scripts/conversation sequence until they are truly authentic, natural, organic and effective.
 - Context is from a desire and commitment to “make a difference”.
 - Scheduled occurrences of referral requests in your master annual calendar.
 - Set goal for how many referrals to generate during any Referral Conversation campaign.
 - Referral Reward System
 - Develop program.
 - Create structures such as referral cards; record keeping process; rewards.
 - Schedule occurrence of any accompanying events in your master annual calendar.
 - Set goals for how many referrals to generate with referral reward system during any month you intend to focus on it.
 - Create management written check list and/or procedures for this process.

- Past Customers
 - Scripts: One script and process for in-active clients (currently not in schedule or have not been for up to 12 months). A different script and process for old clients (12 months or longer not in schedule).
 - Practice and memorize scripts/conversation sequence until they are truly authentic, natural and organic.
 - Context is from a desire and commitment to “make a difference”.
 - Scheduled occurrences of contacting past customers in your master annual calendar.
 - Develop, then maintain database for storing customer information and to be able to tap it at any time for current and past customer contacting.
 - Develop any post card, letters or other written media for past customer contact.
 - Block time in your calendar for executing on this recurring action. Determine the best rhythm of time intervals for this process.
 - Create management check list and/or procedures for this process.

- Business Alliances – referral relationships with other professionals and business owners.
 - Develop Business Alliance plan: what type of businesses; how many professionals/owners; who.
 - Research/create list of potential business alliances to build over the next 18 to 24 months.
 - Plan scheduled time in master calendar to work on this plan including contacting, setting up meetings, etc.
 - Scripts
 - Practice and memorize scripts/conversation sequence until they are truly authentic, natural, organic and effective.
 - Context is from a desire and commitment to “make a difference”.

- On-going relationship actions: Determine, document and schedule what you will do periodically through year to maintain and/or deepen these relationships.
 - Create management check list and/or procedures for this process.
- Networking
- Research networking opportunities in your area.
 - Hard networking groups that meet weekly and allow only 1 person for each niche profession.
 - Open group/opportunities such as merchant associations, chamber of commerce, etc.
 - Social opportunities such as community events, art openings, city functions, charity events, etc.
 - Determine which events you will commit to consistently.
 - Block these event dates in your master calendar.
 - Seek out to meet targeted individuals on a one-to-one basis for getting to know them and for them to get to know you. Preferably target those you know you can be of help to and vice versa.
 - Develop initial 10-15 second introduction script with it's secondary 20 second "tell-me-more" follow up.
 - Develop and maintain your data base of your network and your networking contacts.
 - Block time in your calendar for follow up with people you meet from networking events.
 - Note cards for sending Thank You notes.
- Customer Service – Staying In Touch (don't let customers forget you).
- Newsletter (digital newsletter)
 - Block time to develop format, theme, topics, write and send.
 - Determine best consistent intervals for sending.
 - Welcome cards/letters
 - Birthday cards

- Just Saying Thanks cards – a way to acknowledge them for staying committed to their health and wellbeing.
 - Customer appreciation events – a way to reward them, create community and have them invite new people.
- Customer Service – Staying In Touch systems.
- Conventional Marketing plan
 - Establish strategic goals and objectives for each tactic. Review these periodically and renew them annually.
 - Develop Uniqueness position and statement. What makes you unique, special, sets you apart.
 - Develop company and personal brand.
 - Weave throughout the company's customer interactions and marketing activities.
 - Social Media involvement.
 - Public workshops, clinics, speaking/educational opportunities.
 - Business signage.
 - Press Releases upon notable events.
 - Educational articles or columns in local newspapers.
 - Website.
 - Well designed and properly targeted direct mail pieces mailed to community.
- Develop statistical tracking structure and process for marketing activities – are you being effective?
 - Scheduled time for recording results of marketing efforts and activities.
- Sales System and Process.
 - Intake form and client files.

All enterprises providing health care services require an intake form for new clients to fill out. This intake form should include (but not be limited to) the following elements:

 - Contact information
 - Health history
 - Goals

- Effective Intake conversation, sequence, and recommendation process.
 - Practice every day until you reach proficiency; then practice until you have master and are converting 80 to 90% of your qualified leads.
- Knowledge of and skill to easily and naturally convert interested prospects into long-term clients.
- Develop tracking grid for measuring and counting sales results. (Key performance indicators).
 - Scheduled time for recording results of marketing efforts and activities.
- Client Management process.
 - Client files
 - client progress forms and process.
 - Client scheduling process.
 - Client follow up process.
 - Customer service processes.
 - Calling client 1 -2 days after visit to check up on body.
 - Maintenance (proactive health) program.
 - Waiting list and recall notebook.

Tangible Forms and Structures in hard format (printed) or electronic format or both. Metro has these available in a “done for you” ready to go format.

Client Process:

- ☐ Documented (written) description of services/program
- ☐ Intake Forms and questionnaires
- ☐ Progress feedback form
- ☐ Disclaimers and Permission forms
- ☐ Cancellation policy
- ☐ Client file folder
- ☐ Other instructional forms or handouts for clients
- ☐ Rx forms in rooms for client treatment recommendations

Your Business Process:

- ☐ Vision and Mission statements
- ☐ Documented (written) business model and description of services and/or programs.
(Forms, templates, charts that represent the model of your business and revenue streams).
- ☐ Goal structures for you; Annual, Monthly, Weekly
- ☐ Electronic calendar; smart phone
- ☐ Calendar schedule for working “in business, working “on” business and your life.
Business time blocked, personal time blocked. Free(fun) time identified and blocked.
- ☐ Scheduling system for clients
- ☐ Tracking structure:
 - ☐ Business statistics;
 - ☐ Marketing/leads statistics;
 - ☐ Sales/conversion statistics;
 - ☐ Financial statistics and tracking.
- ☐ Lists of Questions during sales conversation.
- ☐ Scripts for business development phase:
 - ☐ Marketing conversations;

- ☐ Introduction statement;
- ☐ Sales conversations;
- ☐ Marketing action plan
 - Ideal client profile/ Ideal market
 - Client referrals system and actions
 - Past customer system and actions
 - Professional and business alliance system and actions
 - Networking
 - Other
- ☐ Marketing plan
- ☐ Master marketing calendar for the year mapping out what you will doing, when.
- ☐ Forms, templates, charts that model and represent your marketing flow.
- ☐ Check lists for marketing activities; sales process; financial tasks.
- ☐ Vision Board (or other format) for your goals enabling you visual presence to them.
- ☐ Business and Personal Budget