Structures and Systems for Effective, Thriving, Profitable, Sustainable Pilates, Yoga, Fitness, Alternative Health Services Business

As a business coach, these are the business structures and systems I work with professionals to create, implement, execute on, and master. These are elements of the physical game of growing and operating an effective and profitable business. Use this as a check list for yourself in starting to do the work of growing and expanding your business. ~ Renae Bechthold

- Documented/Written Goals with specific measurable elements and a completion/by-when date.
    - Annual Goal setting process.
    - Monthly and weekly goals documented, then measured and tracked.
- Financial 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
  - Referral Generation Systems & Processes
  - Past Customers Recall Systems & Processes
  - Business Alliance Development Systems & Processes – referral relationships with other professionals and business owners.
  - Networking
  - Customer Service – Staying In Touch Systems & Processes(don't let customers forget you).

- 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 & Internet
  - Public workshops, clinics, speaking/educational opportunities.
  - Business signage.
  - Press Releases upon notable events.
  - Educational articles or columns in local newspapers.
  - Website.

- o Direct Mail -Well designed and properly targeted direct mail pieces mailed to community.
- Tracking structure and process for marketing activities – are you being effective?
  - o Scheduled time for recording results of marketing efforts and activities.

- Sales System and Processes for conversion and retention.
- Client Management process.

For companies with staff
- Company policies, procedures, and protocols manual
- Job descriptions
- HR Systems for recruitment and retention
- Specific function documented procedures and check lists
- Weekly staff meeting schedule and format
- Management check list
- Legal entity maintenance schedule and processes
- Payroll systems

If you are a brand new start up you will also need to include:
- Business name, preferably strategically created based on business identity, ease of use, memorability.
- Business license if applicable in your city or town
- Local ordinances and laws
- Bank accounts
- Equipment, supplies, furnishings.
- Bookkeeping software
- Telephone and Telephone services
- Internet and Internet services
- Computer

Tangible Forms and Structures in hard format (printed) or electronic format or both.

Client Process:

- ❐ Documented (written) description of services/program
- ❐ Intake Forms and questionnaires
- ❐ Progress feedback form
- ❐ Disclaimers and Permission forms
- ❐ Cancelation 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 plan and 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

Your Mental Game is internal utilizing your mindset, beliefs, thoughts, habits and ways of being. They include the following distinctions and principles:

Clarity, Commitment, Consistency, Capacity, Momentum, Accountability, Intention and intentionality, Attention, Belief, Self-worth, Confidence, Integrity, Alignment, Persistence, Perseverance, Focus, and more...