

*Webinar 12 Handout:*  
**STEP 3 TO BUILD YOUR BRAND**

**Step 3: Get Down to *Business***

Okay, you've developed your brand (or at least a starting place for your brand) and feel confident about your business goals and internal values. Now, it's time to get down to *business*. Before you jump right in and start seeing clients, there are a few basics that need to be taken care of. You may consider this the "boring stuff" or the "confusing stuff" but it doesn't have to be either of those things. We'll walk you through a few of the must-do pieces of the puzzle and fill you in on items to consider for the future as your business continues to grow. There are some things you might need to research by yourself depending on the exact what and where of your business venture. Our goal is to set you on the right path and arm you with the tools you will need to make your business dreams a reality.

Let's go through the first basic steps that most health professionals will need to take care of when setting up their businesses. This handout is long, so it might be helpful to read through once, then go back to review and set a plan.

**Finalize Brand Name:** After going through the brainstorm session in Step 2, you should finalize your brand name before continuing any further. Will it be your own name? A different business name? Before you decide on the name, check for availability of URLs and social media handles. Consider names that are easy to remember and spell so that people can find you. Also think about your goals for the future. Do you see your business growing into a team? Do you think you'll eventually move to another town/state? You will want a name that will still fit you as you grow (for example, you may not want to brand yourself The Cincinnati Dietitian if you think you'll be moving in the next few years). Most importantly, the brand name should be a reflection of the values of your business.

**Register the Business:** Every state has different laws about doing business. Consider how you will structure your business and how you will file with the state. Do your research on the different processes and laws for setting up your business depending on where you live and where you'll be practicing. For most dietitians and other health practitioners, the most common ways to file are as a sole proprietorship or as an LLC. There is also the option of filing as an S-corp. Remember, every

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state and country is different so do your research on what is best for you. Here's the basic 411 on each to get you started:

- **A sole proprietorship** is easy and inexpensive and requires minimal paperwork to get started. However, you and your business are considered the same entity, meaning you are personally at risk for things like debt or being sued. It's also more difficult to raise funds or take a loan, since you and your business are basically one and the same. It's a simple structure with some personal risks.
- **An LLC** is a limited liability company and is a good option for small businesses. The LLC structure provides the personal liability protection of a corporation with the tax benefits of small business. There is slightly more paperwork and higher fees, but it's still fairly easy to file and can be done all online. Single member LLC is a common structure for health practitioners who operate a solo business. LLC is a good structure to consider if you think you might take on investors in the future.
- **An S-Corporation** is another way for small businesses to incorporate. This structure is designed to avoid certain tax drawbacks of regular C-Corporations. This is a good option if you intend for your business to remain small as there are a few restrictions for taking on investors.

**Create an Office:** Where will you be meeting your clients? Will you rent an office space? Create a home office? Will you be meeting in coffee shops or other local venues? Will you see clients in a gym? Is everything online? Have a plan before you book your first client. Even if you don't plan to have an office in the physical sense for seeing clients, you'll need to think about office "tools" you'll need for success, such as printers, scanners, or software (accounting, nutrition analysis, etc). In today's world most everything is digital, but many still find it helpful to have a home base, such as a desk in the home.

**Build Your Website:** Building a website might sound intimidating, but trust us, anyone can build a site (even those who aren't tech-savvy!) When you're just starting out, using a website builder (such as Wordpress, Squarespace, Wix, Weebly, Shopify, or Rainmaker) and doing it yourself is an inexpensive option. It's fairly easy to get a simple site up and running that will meet your needs when you're starting your business. You could also consider hiring a professional website designer to help you, especially if you've had your business for a while and already have a simple site--now is the time to step it up! You want to choose a domain name that makes your business easy to find and make sure your site is aesthetically pleasing and functional/responsive on both desktop/laptop and mobile devices.

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Whether you're starting out with a simple, bare-bones site, or you've hired a professional to go for the gold, there are a few basic items every health professional's site should offer.

## Website Basics:

- **Your location and contact information:** Seems like a no-brainer, but even those who practice online or via Skype should make sure their clients know where they're based. Include clear instructions on the best ways to get in touch. Phone? Email? You can also build a contact page so that potential clients can email you right through the site.
- **A bio:** Your clients will want to know who you are and why you are qualified to help them meet their goals. Your bio should offer information about your education, experience and credentials (a great place to display your Nutritious Life Certified badge, which you'll receive upon completion of this program!) as well as some information about YOU! What are your hobbies? Favorites foods? Preferred workouts? You don't want to get *too* personal, but you want any potential clients who are browsing the site to feel like they know even just a little bit.
- **Your philosophy and specialties:** What is your nutrition philosophy? It's helpful to have an introduction to your approach so potential clients know whether or not you'll be a good fit. You should also list specialty areas, such as weight loss, vegetarianism or heart health, to help potential clients decide if you're right for them.
- **Your services:** What exactly do you offer clients? Nutrition consultation packages? Grocery store tours? Community seminars? Personal training sessions? Potential clients should know what you do! Posting prices here is optional. Some professionals like to be upfront about what they charge and post prices on their sites, but it may make it more difficult to change pricing as your business grows. Obviously, if you sell services and packages online, you'll need to be upfront about your pricing.

**Start a Blog:** Even if you don't plan on starting a revenue-generating blog, a blog is a great feature to have on your site for marketing purposes. First of all, it allows clients and potential clients to have a glimpse into your world and offers them a chance to get to know you better. Beyond that, blogging helps with SEO (search engine optimization; more on that later). Adding content on a regular basis lets search engines like Google know your site is active, alive and relevant, which will help with your rankings on search pages. It also gives search engines keywords to look for. We recommend adding new content on at least a weekly basis, but the more the better for search. When you have a blog, you can join blogger networks to share your articles and blogs with a larger audience. Always remember to comment back to people who commented in your blogs and engage your audience!

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**Decide How You'll Get Paid:** Before you can start taking on clients, you need to decide on a system for payments. Whether you see clients in person, run a virtual practice, or book through another entity such as a gym, you have a few options.

- **Cash or check:** Though it may seem primitive in the digital era, cash or check payments are beneficial for a business because you don't lose any of your payment to credit card fees (more on that below). This is really only convenient if you see your clients in person.
- **Credit card:** We suggest every business have a method for accepting credit cards. Most clients will prefer to pay this way and credit card payments can streamline the reporting process. Yes, you'll have to pay a small fee (typically about 3%), but this can be factored in when you set your rates. These days, you have several choices of how to take credit card payments. The best option will depend on your specific business. These just are a few of the available options:
  - **Square:** By this point, we've pretty much all used Square (think paying via iPad at your hip neighborhood cafe). The company sends you a Square reader (the basic reader is free but there's a fee for a chip reader) so you can swipe cards via iPad or phone at your appointments. This is traditional Square point of sale. There's also an option for e-commerce, employee payments and more. Square is very easy to use.
  - **Stripe:** Stripe is a good option if you accept payments online because you can integrate it into your website. They have a lot of customization options so you can tailor the service to fit your needs. They also offer a Stripe card reader for taking payments in person.
  - **Payline:** Though this service has slightly higher rates, they offer discounts for high volume small businesses. There are several options to choose from depending on your exact business model, including an option for Payline Medline which is HIPAA compliant.
- **Payment through an employer:** If you'll be booking clients through another entity such as a gym or spa, you need to know how you'll get paid and what percentage is yours of course. Will clients pay you and you owe a cut to the gym/spa, or will clients pay the gym/spa and you'll get paid by the business?
- **A few notes about:**
  - **Venmo:** While it's free for peer-to-peer transactions (like splitting the dinner bill with friends) you'd have to set up a business account (personal accounts may not be used to receive business, commercial or merchant transactions, according to their legal), and they don't currently accept all business models.

- **PayPal:** PayPal is an option to receive payments, but it's recommended to use a business account rather than a personal account. This certifies that you're using the account primarily for a business or commercial purpose and provides some additional features. .
- **Cash:** Yes, we did say cash payments are good (and they are!), just make sure you're tracking your income.

**How to Choose a System:** The best system for your business will depend on several factors, including number of revenue streams, business model and sales volume. If you plan on taking payments through your website, either for client appointments or for items in an online shop, there are a few things you should understand on the technical side so you can decide on the best payment system for your business. Let's start with a quick vocab lesson:

- **Payment gateway:** a secure online portal that mediates online transactions. It basically links your site's shopping cart to the credit card processing network and encrypts the data to keep everything secure. An example is Authorize.net.
- **Modern payment gateways:** systems that don't require a merchant account (such as PayPal or Stripe).
- **Payment processor:** what actually executes a transaction (like a credit card machine in a store). It transmits data (or encrypted data--thanks payment gateway!) between the seller, the customer, the seller's bank and customer's bank. It's often combined with the payment gateway. Not all payment processors require a gateway. Square is a payment processor designed to run without a gateway.
- **Merchant account:** a type of bank account for your business that accepts card payments online.
- **Full service providers:** companies that provide a merchant account along with payment processing and a payment gateway.

Okay, so now that you know what each piece of the puzzle does, how do you pick a system that's best for you? Here are some of the questions to ask yourself about your business and what you expect from your provider. Once you answer these questions, you'll have a better idea of what you need to look for when choosing a system.

- **Will you have an online shop with several items?** Will these items be your direct products or come from somewhere else? You'll need a system that can manage this.
- **Will you accept international payments (either from clients or online)?** You'll need a system that can handle this.

- **Does your business take recurring payments?** Will you offer payment plans or sell a product such as a monthly subscription? You'll want a system that's equipped to handle this and that can manually update declined or expired credit cards so you don't have to track down customers yourself to update information.
- **What type of fees does the company charge and how are they structured?** Are there individual fees for everything (setup, transaction) or is it flat-rate pricing? Consider how much you'll pay in fees based off projected sales volume--it could vary greatly between providers.
- **How is customer service handled?** Some companies operate customer service through outside agencies based in other countries, meaning representatives aren't always knowledgeable about the product and wait times can be long. This could result in a huge headache if issues arise and you need help.
- **What type of income reporting is available?** For larger business this is key since you likely won't be manually tracking your income.

Feeling overwhelmed? First, take a deep breath. [Next, check out this chart that](#) gives a breakdown of what some of the major providers offer. This list definitely isn't exclusive, so do your research and see what makes sense for your business.

What else should you consider for your site (either now or in the future)? What do you need to think about to grow your business?

- **Understand conversion rates.** This is the percentage of visitors who become buyers/clients on your site. Consider how to maximize your conversion rate.
- **Understand SEO (search engine optimization) and SEM (search engine marketing) for your website.** This is what helps your site come up first when someone does a search and can be improved by regularly publishing relevant content, utilizing tags, and using keywords. Consider how you can improve your website SEO.
- **Consider ad sales on your site.** If you receive regular traffic to your site, ad sales can bring in passive income every month.
- **Look into affiliate programs.** If you are selling anything online, affiliate programs can provide another stream of passive income.
- **Consider investing in equipment.** Cameras, microphones, lighting for photos, videos, etc. to enhance the quality of your content.

## Other Items to Consider (either now or down the road):

- **Creating a logo.** A logo will give your brand identity and will create a uniform look on all your materials and assets. Logos don't have to be complicated. Even a simple "wordmark" logo with a uniform font and color scheme can be a logo (hello, Google). It could also include a symbol or another graphic representation. Whichever type of logo you choose, be sure of the legal implications. It may be helpful to hire a graphic designer with experience to help you on this.
- **Obtaining professional liability insurance.** This is especially beneficial if you run a private practice or counsel clients. Not to be a downer, but when you are in business there is a chance of being sued. Insurance can protect you here.
- **Posting legal waivers** on your website and any marketing collateral you might use with clients. It's worth consulting a lawyer to get set up correctly!
- **Obtaining professional certifications** and maintaining your status through CEUs.
- **Filing trademarks.** You may need a trademark if you will be selling a product or if you foresee potential for a unique idea to be copied. Trademarks can be expensive and require paperwork, so not everyone will need to consider them.

This list will set you on the path to get your business up and running, but it's up to you to do your research and make sure you are meeting the requirements of your country, state, and field of business.