Lesson 12: Transcript

Running as Successful Business

Hey there everyone. Today we are getting down to business and I mean really getting down to business because the last sessions have really been dedicated to education and then they went into the client plan and they were client-centered, but now it's you-centered because it's business-centered, about your business that you're going to build.

If someone had told me all the things I'm about to tell you over a decade ago when I was starting my business, I would have saved so much time, energy and money and made so much more money. And I hate talking about the money side of business. It's not my strength. It's not what I enjoy talking about. But the fact is you're running a business so we need to address it. So here goes.

Time management is one of the most important things that you can manage and conquer in terms of running your business. You have to. If you are a procrastinator, if you're not a structured person and you're running your own client-based business, you're going to have to change that because you have to use good time management skills. It is absolutely essential. And one of the most important things with having good time management when you are starting to see clients and build a business is creating your own schedule.

One of the mistakes I made when I started seeing clients was I'm available all the time. I just want to see as many people as I possibly can. So I would see someone perhaps on Monday morning at 7:00 AM and then see someone later that night at 8:00 PM and I was all over the place and you know what? All that did was make me run down, tired, not efficient with my time and in the end not as productive and not as good at giving nutrition information as I should have been because I was run down and all over the place.

You need to give yourself a set schedule. So even if you have more time, give yourself time that you're going to see clients. For example, that could be Mondays from 1:00 to 6:00. It could be Tuesdays from 6:00 AM or 7:00 AM until noon. Give yourself that time and then try to build clients into that time. That way if you have an opening in your schedule, let's say you're working from 12:00 to 7:00 one day or that's the time that you've scheduled yourself to see clients, from possibly 2:00 to 3:00 you have an opening and you know what? You'll be more motivated to fill that opening, to call an old client to call a new referral, to get someone in that door to fill that slot.

Then if you don't fill that slot, use that time in the best possible way. Don't just let the hour come up and then say, I'm going to check my email. I'm going to go read a couple articles. Have a plan. Perhaps during that hour you reach out to five people that you think may be good referral sources or have a plan to do a client plan as a follow-up or write down a list of 10 clients that you want to email some great follow-up information to, but have a plan to be efficient during that time.

So we just talked about scheduling client time. You also need to schedule a certain amount of time where you are dedicated to marketing, social media, meeting with potential people that you can network with for referrals and you need to schedule that time in as well and be diligent in filling that time. You may schedule from 2:00 to 6:00 on Thursday afternoon, you're going to work on marketing and social media strategy and networking and perhaps you schedule in a green tea meeting with someone you want to network with. Well then right after that have a plan to be at your computer getting 10 other things done on your list. Don't let that turn into, well I'm going to stop by here and then do something else because I don't have a client booked. You have to be efficient with your time and push yourself to use those hours that you've scheduled to market yourself and network and be creative with building your business.

Another part of time management that you have to think about is when you're actually sitting there with a client, what do you do if a client keeps asking you questions and you know you have someone right after? That can kind of be really tricky. It's hard to cut people off. What I always suggest is have a clock in sight that you can absolutely see without having to say pick up your iPhone and check the time or turn on your computer or something like that. You don't want it to distract from the session. You want to make sure that you just have a clock right nearby that you can check and you can even tell someone, "You know we have about five minutes, so I want to really cover these next few items and I want to talk about your goals for the next session." Give people a warning.

Every once in a while you're going to be in a session with a client with one minute left or maybe or even a couple minutes over and you're sitting there with a client who's having a really bad day. Maybe the tears are flowing and they are just no where ready to end the session. That can be very tricky and can put you in an uncomfortable position. You have to be really confident with how you handle these situations. What I usually do is go an extra five to 10 minutes depending upon if I have another client or not. If I have another client, I will go five minutes late, but that's it because you can't make another client sit there and be that late for. If I don't, I'll then choose to go an extra five minutes and go to about 10 minutes, but then you have to know how to shut it off.

So whether it's five minutes or 10 minutes, what do you say? How do you handle the situation? What I'll say to that person is, I absolutely want to continue working with you on this, but our time is up. We've gone over five minutes or we've gone over 10 minutes, but I'm not going to wait to see you until next Thursday when you're coming back in. Let's address it tomorrow and I would schedule a five-minute or 10-minute phone call with that person.

This is one of the hardest situations to deal with because I know when I'm sitting there and someone is teary or someone is really upset, it is so difficult to tell them that the session's over or that you have only five more minutes or that you're already over 10 minutes. It is so hard to stop that conversation because all you want to do is continue to help that person. But on the other hand, you also may have another person waiting and you also have to have some form of boundaries to help protect yourself so you don't get, not only taken advantage of but also just drained. It can become very emotional and you can get too attached to that situation. So what I usually recommend doing in that situation is giving that person one or two really little things to go and do.

It really depends on the individual and you have to know the person you're talking to, but for some people it could even be telling that person to go home and make a cup of tea. For someone else, it could be writing in a journal. For someone else, it could be, I want you to go home and call this person. But give them one thing or two things to go and do and then tell them that you're not going to wait a week to speak with them, that you are going to plan a five or 10-minute phone call with them the next day so they are comfortable, they are confident, they feel good knowing that you've just given them something to go and do to help them feel a little bit better at that exact moment.

And then you've also told them and supported them by letting them know that you are there for them the next day you're going to continue the conversation, they don't need to wait an entire week to see you. And then I would schedule in that time, even if it is outside of your normal hours. There are some times you do need to bend those rules with your time and you do need to go above and beyond and find that time to speak to a person like that because believe me, you will feel so good doing that. Your client will feel so good and supported, but you will also feel good supporting that person.

We just talked about time management. Now I want to talk about the amount of time that you're actually going to spend with a client. Here's how I roll. I spend 60 minutes for the first session, 60 minutes for the second session, and then I have 30 minute follow-ups. But here's the thing, I always schedule 75 minutes for those first two sessions. Those first two sessions when you're doing the intake in session one and when you're giving the plan and session two they can easily require a little bit more time depending upon how much information that client's giving you in session one and how long it's taken you to explain the plan in session two. And I always like to give myself a little bit more time so I give myself that little bit of a cushion there. I wouldn't schedule a new client at 11:00 and then somebody else at 12:00. With half hour follow-ups, absolutely. I'll book them right in a row, 11:00, 11:30 and 12:00 and stay really focused on being punctual.

Some people also find it helpful to have 15-minute check-ins and the client will come in with their food journal. The nutritionist or trainer will see that person's food journal. They'll give that person a few tips and the client will be on their way. I've never found that to be useful because I always go over the 15 minutes and end up usually seeing that person for a full 30 minutes, so it hasn't worked for me. But for some of you out there that may be trainers or chiropractors and want to do 15-minute sessions at the end of your regular session, that could be something that works well for you.

I have people pay upfront for packages either four sessions, eight sessions, or twelve sessions. And that's not just because while it's nice to get paid upfront, it's because it actually helps the client be more committed. When the client knows what they're committing to and they're committing to either a month or two months or three months and they're committing to a program, they're going to be more accountable. Chances are they are going to be more successful. The other reason you have people pay for packages upfront is it's not just that you're helping them commit, but also remember you're putting a lot of work into this plan. It's not just about the time that you're spending with them in that first hour and then the second hour and then in the half hour follow-ups, but you're spending time after creating that specific plan tailored to that person.

You also may be spending some time emailing with that person. You may end up on the phone with that person a couple of times, so there's a lot of other work that goes into those four, eight or twelve sessions. It's not just about the actual hours that you're sitting in your office or at the coffee shop with that client of yours. So you really have to take that into consideration when you're creating your pricing and that's also why you're paid upfront because you're going to do all of this work for this person after that first session and you know what? You need them to be committed to coming back.

After the initial package where you've seen a client for the first two-hour sessions and then have had the follow-ups, so you've had either four total sessions, eight total sessions or twelve total sessions. I still recommend selling half hour packages of either four, eight or twelve however, for some people it depends on your market. It depends where you're located, what people are willing to pay for and what people are willing to commit to. But I would say that it is okay to do half hour pay-as-you-go sessions after the full package has been completed.

Another thing you need to consider when it comes to payment is discounts. Yes, people love discounts. You have to have a set policy, whether it's 10% or 15% off for either VIP and/or family and friends. You also should have a set marketing plan for when you're going to have discounts throughout the year. New Year's, back to school, get in shape for summer are just a few examples, but you have to make sure to capitalize on the seasons and also create your own time that you're going to do a discount. It could be your own program you're doing for whatever the reason is special to you, but just make sure you have a marketing plan for when you are going to implement discounts and definitely have a set policy for the family and friend aspect.

So now you know how to structure your business, but how do you actually get paid? Do you invoice? Do you accept credit cards? Do you take insurance? What do you do? Let's start with the insurance component. I wish that weren't the case and I wish it was easier to take insurance but it just hasn't made sense for me business-wise. What I do offer people who can't afford to come in and if a 10 to 15% discount doesn't work for them, I'll offer payment plans and then I will also offer to do a 24-hour analysis of someone's diet. So I'll have them send in a 24-hour food journal and then we'll use our nutrition software and do an analysis of that and write up a little summary for that person. And that is something that I do charge a lot less for. So that's always an option for someone that you really do want to help out and you want to be able to give them a service.

If you decide not to take insurance, something you really do need to consider is that many doctors will only refer to dieticians and nutritionists who take insurance. So you need to think about that when you are networking. You don't want to spend all this time networking with a doctor and developing a relationship to find out that they won't refer to you because you don't take insurance. So make sure you're networking in the right places. If you're finding yourself frustrated that people are calling your office and asking if you take insurance and then you feel like you're missing out on business. I would rather see you lower your rates, make your rates easier for people to afford and see more people and help more people and spend your time working with people that way than spending your time worrying about billing and all of the other headaches that go along with insurance.

There are so many other services you can offer. You can do grocery store tours, you can do pantry makeovers in someone's home. You can do one-time Skype sessions, you can do cooking demos, you can do speaking engagements and you can do group sessions. Get a whole group of people together and that way you don't have to see someone one-on-one. You can charge less to each individual and you can see even six to ten people at one time. Have a group session and that way those people may even end up coming in for their own individual packages. But you're still able to help people and grow your business at the same time.

So how do you charge for all these services? Well, there's really no one right answer. It's going to depend on your experience, where you're located and who you're targeting, who you want to work with. I've attached to this webinar a handout with basic guidelines and ideas for you to start with. You may find that you can charge a little bit more. You may find that you need to actually lower the rates a little bit, but it's a good starting place for you and remember, there is no exact right answer.

The final piece of this business puzzle, your brand. Who are you? And no one knows that better than you. You need to think about who you are, what your brand is going to be. Be authentic to that and create an awesome name that goes along with that brand. Who are you? What do you want to stand for? Create a mission statement and also create internal values. A mission statement is going to be something that the world can see, something that you're going to put out there that summarizes what you are, who you are and what you believe in, but your internal values is something that you don't necessarily need to share with anyone. You can if you want, but it's more of a guideline for you to hold true to. Something that you can refer back to when things come up, whether it's someone you may potentially work with or another type of an opportunity or a speaking opportunity or partnering with a brand.

You can look at your internal values and say, does this really go along with who and what I stand for, what I want to do? Because opportunities will come up that are not in line with who you are and it is hard to say no sometimes when you're trying to grow a business, but staying true to who you are and what you believe in is so critical to building your brand about what you believe in and who you are. Along with that great brand name, you need to make sure that your social media tags go along with that brand name and also your website. And make sure your website is super easy to navigate.

Building a referral list is essential to building your brand and your client base as well. Target a few people that maybe you met at a networking event or are a friend of a friend, other people that are in your world that could be potential referral sources. Plan to meet them at their office or have a cup of tea or go for a run with them. Meet them, talk with them, start sending them people to work with. They'll refer back to you and then continue to build that relationship. Even if you start off with two people and then you build to four, you'll quickly grow to six, then eight, then ten people that are in your world that you have ongoing relationships with that you send people to and they send people to you.

In order to build your business, you always want to be selling, but I don't mean hard selling, hey, I'm a health coach, or hey, I'm a nutritionist and I want your business. No, none of that. I want you to always be practicing what you preach and putting out great information. It could be when you're even purchasing a shirt at a department store, you may be having a conversation with the saleslady and you know what? You may offer up a nutrition tip. Always give information. When you are giving nutrition information, you're doing what you love, you're doing what you believe in and that will turn into business.

And if you give someone a little nutrition tip and they say, "Wow, I like that. That sounds interesting. I didn't know that." You should respond with, "Serve it up to a friend, serve it up to somebody else, pay it forward." Always be pushing nutrition information in a fun, creative way, in a way that people are engaged and they say, Oh, I didn't know that. Or that's a great tip. I can't wait to try that. And then tell them to pass it on or serve it up to their friend.

Don't be afraid to partner with like-minded brands. You should be partnering with like-minded brands. Working with like-minded brands is one of the best ways you can build your business and you can learn from like-minded brands. It's a good thing. Don't be afraid of competition. You're not in competition with anyone but yourself. Focus on your brand. Be true to your brand. You're the only you. Partner with other people to grow your network and to grow your own education. You should be educating yourself at the same time you're educating others.

Don't forget that building a brand is like raising a child. It is precious to you. It is who you are. It's an extension of you. You need to nurture it, you need to take care of it. You need to put everything you have into it, but you are going to make mistakes. You are not going to do everything right all the time and that's okay. I always just say, learn from your mistakes and don't make them twice. And even if you make them twice, certainly don't make them three times. Learn from them, grow from them, and have fun and enjoy building this baby of yours.