

# HOLISTIC BUSINESS BLUEPRINT

A GUIDE TO BUILDING YOUR WELLNESS BUSINESS



*From the Holistic Entrepreneur Association*

# *GAPS Training Benefit: Complimentary Access to the Holistic Entrepreneur Association*



The Holistic Entrepreneur Association is pleased to partner with GAPS Training to support your efforts in growing a thriving practice.

The Holistic Entrepreneur Association helps health professionals succeed by providing done-for-you marketing materials, ongoing business and marketing education, masterclasses with business experts and successful health professionals, and a supportive community of fellow practitioners.

You'll receive your complimentary access to the HEA Professional Membership upon completing GAPS Training.

As part of your HEA Professional Membership, you'll receive:

- Monthly masterclasses with business experts with accompanying Monthly Action Plans to help you make forward, focused progress
- Pre-designed and fully customizable marketing materials, such as flyers, business cards, and social media images
- Monthly pre-written articles you can use to advertise your new practice
- Presentation kits that include everything you need to deliver a successful lecture in your community
- Daily curated health articles and recipes that you can share on your social media platforms
- Step-by-step video training to set up the technical aspects of your marketing foundations, including setting up a one-page website
- Deep dives with successful practitioners sharing how they did it
- A big-hearted community for networking and support



# HOLISTIC BUSINESS BLUEPRINT ASSESSMENT

The Holistic Business Blueprint was created to provide you with a roadmap for launching, growing, and scaling your business. Below, you'll find an assessment to help you determine your current stage of business. If you feel like your business might be in multiple stages, go with the earliest stage you can fit into. Continue to the following pages for more details about your particular stage, complete with the milestones and action steps that accompany it.

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- |    |  |          |      |                              |
|----|--|----------|------|------------------------------|
| 01 | "I have identified my the specific kind of client I'm trying to serve, created my niche statement, and can clearly state the challenges, fears, frustrations, and desires of this client."                                   | Yes<br>↓ | No → | Begin at Stage 1, Clarity    |
| 02 | "I am clear on my business goals as well as on the services I provide and I know how these services solve the problems and meet the needs of the challenges, fears, frustrations, and desires of my target client."          | Yes<br>↓ | No → | Begin at Stage 1, Clarity    |
| 03 | "I have created my brand messages so that I can clearly communicate what it is that I do in a way that is compelling for my target client."  | Yes<br>↓ | No → | Begin at Stage 2, Identity   |
| 04 | "I have established the visual and brand identity of my business, including the name of my business, my logo, simple website, and marketing materials."  | Yes<br>↓ | No → | Begin at Stage 2, Identity   |
| 05 | "I have decided what kind of legal business structure I'll be starting with and have taken the steps to established the legal identity of my business within this structure."  | Yes<br>↓ | No → | Begin at Stage 2, Identity   |
| 06 | "I have set up the systems for my business, including financial, invoicing, client booking, client tracking, inventory, and have things organized so that I can run my business in an efficient, professional manner."       | Yes<br>↓ | No → | Begin at Stage 3, Systems    |
| 07 | "I have a clear plan for consistently introducing my business to new prospective clients and am actively executing it. I collect the email addresses of prospects and am growing my list of email subscribers."              | Yes<br>↓ | No → | Begin at Stage 4, Attraction |
| 08 | "I have a strategy for regularly creating and delivering free, valuable content to enable my prospective clients to get to know, like, and trust me as a wellness professional and am executing this strategy consistently." | Yes<br>↓ | No → | Begin at Stage 4, Attraction |
| 09 | "I have a strategy for promoting my paid services to prospective clients and am regularly conducting sales conversations to convert prospects to clients."   | Yes<br>↓ | No → | Begin at Stage 4, Attraction |
| 10 | "I am consistently gathering feedback from clients to optimize my services, identifying and documenting key workflows and metrics, and hiring support where needed."   | Yes<br>↓ | No → | Begin at Stage 5, Expansion  |

# 01 | Clarity

In this stage, you're getting clear about what your ideal business looks like so that you can create a clear plan for getting there, who it is that you're serving, and what outcome you're helping them achieve.

## Milestones for this Stage

- ▶ I can clearly picture how my ideal business looks, including the size of my future business and how I am working with clients (in person, virtually, primarily one-on-one, primarily in groups, etc.)
- ▶ I can clearly state the specific kind of client I focus on serving
- ▶ If asked, I could describe my target client in clear detail, including the unique and pressing challenges they are experiencing
- ▶ I know what services I provide, have defined their pricing, and can clearly state how they are solutions to the specific challenges my target client is facing

## Action Steps for this Stage

- Get clear on your ideal business
- Decide how you would like your ideal business to look, including the size of your future business and how you are working with clients (in person, virtually, primarily one-on-one, primarily in groups, etc.)
- Zero in on the specific kind of client you will focus on serving
- Identify your target client in clear detail, including the unique and pressing challenges they are experiencing
- Decide what services you will provide, define their pricing, and clearly state how they are solutions to the specific challenges your target client is facing

## 02 | Identity

During this stage, you'll establish the identity of your business. This includes naming your business, deciding on what kind of legal business structure you'll be using, as well as establishing your brand messages and brand identity materials (website, logo, and business cards).

### Milestones for this Stage

- ▶ I have named my business and secured my website domain name and business social media accounts
- ▶ I have created my brand messages to clearly communicate what it is that I do in a way that is compelling for my target client
- ▶ I have created my brand identity materials, including my logo, business cards, and website
- ▶ I have decided what business structure I'm going to start with (such as a Sole Proprietorship, LLC, etc.) and have completed setting it up

### Action Steps for this Stage

- Name your business and secure your website domain name and business social media accounts.
- Create your brand messages to clearly communicate what it is that you do in a way that is compelling for your target client.
- Create your brand identity materials, including your logo, business cards, and website.
- Decide what business structure you're going to start with (such as a Sole Proprietorship, LLC, etc.) and complete setting it up

## 03 | Systems

During this stage, you'll establish the foundational systems for your business to allow you to get up and running in an organized, efficient manner. Here, you'll set up your financial and invoicing methods, get insurance for your business, decide how you'll keep track of client records and progress, and set up your digital business center to keep all the moving parts of your business organized in one place.

### Milestones for this Stage

- ▶ I have secured my business insurance
- ▶ I have secured the necessary business permits and licenses based off of my local requirements. If I'm selling supplements out of my office, I have acquired the necessary reseller's permits or licenses based off of my local requirements
- ▶ I have decided on which payment system I will use to accept payments from my clients. In addition, I've decided what bookkeeping/invoicing system I'm using to keep track of finances in my business. I have also opened a business bank account
- ▶ I have decided on the client booking and tracking systems I will use, whether that's manual booking and tracking, booking via a booking software and manually tracking client progress, or using an online client management platform for both booking and client tracking
- ▶ I have set up my business center either in folder format or digitally via Trello, Asana, or Google Drive to keep all the moving parts of my business organized in one place

### Action Steps for this Stage

- Secure your business insurance
- Secure the necessary business permits and licenses based off of your local requirements. If you are selling supplements out of your office, obtain any necessary reseller's permits or licenses
- Decide on the systems you'll use for client payments and financial tracking for your business. Open a business bank account
- Decide on the systems you'll use for appointment booking and client progress tracking
- Set up your digital business center to keep all the moving parts of your business organized in one place.

## 04 | Attraction

During this stage, you'll begin consistently promoting yourself and your services to make yourself known in your community and among those you want to serve. Here, you're creating a plan for **connecting** with new prospective clients to introduce them to your business, **nurturing** those prospects by providing consistent, valuable content, and lastly **converting** those prospects into clients through promotions and sales conversations.

### Milestones for this Stage

- ▶ I have a clear plan for consistently introducing my business to new prospective clients and am actively executing it
- ▶ I have a strategy for regularly creating and delivering free, valuable content to enable my prospective clients to get to know, like, and trust me as a wellness professional. At least part of this strategy includes regularly sending value-based emails to my growing email list of prospective clients to nurture the relationship
- ▶ I have a strategy for promoting my paid services to my prospective clients and am implementing it consistently
- ▶ I feel comfortable conducting a sales conversation

### Action Steps for this Stage

- Create a clear plan for consistently introducing your business to new prospective clients and actively execute it
- Develop a strategy for regularly creating and delivering free, valuable content to enable your prospective clients to get to know, like, and trust you as a wellness professional
- Set up your email collection strategy for growing your email list of prospective clients and employ a plan for regularly sending value-based emails to nurture the relationship
- Develop a strategy for promoting your paid services to your prospective clients and implement it consistently
- Get comfortable with the skill of conducting a sales conversation

## 05 | Expansion

In this stage, you're consistently carrying out your attraction methods and are regularly working with clients. Here, you're gathering feedback from clients you are working with to optimize the client experience you are delivering, identifying and documenting key workflows in your digital business center, using metrics to help grow your business, and hiring to accommodate your growing workload.

### Milestones for this Stage

- ▶ I have identified the key workflows for each area of my business and am documenting them in my digital business center
- ▶ I am gathering feedback from the clients I'm working with to optimize my client experience
- ▶ I am using metrics to help me grow my business
- ▶ I am hiring and delegating to make my business more efficient and to accommodate my growing workload

### Action Steps for this Stage

- Identify the key workflows for each area of your business and begin documenting them in your digital business center
- Gather feedback from the clients you're working with to optimize your client experience
- Identify and use metrics to help grow your business
- Hire and delegate to make your business more efficient and to accommodate your growing workload

# *A Note from Jessica, Founder of the HEA*

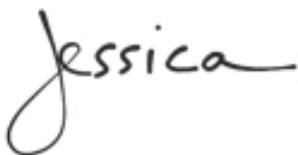
I hope you enjoyed this assessment and that you're ready to take action!

I created the Holistic Business Blueprint because it is exactly what I wished I could have had when I first started. Just like you, I've been in the trenches as a wellness professional. Throughout the last decade, I've run my own practice as a functional nutritional therapy practitioner, served as the Head of Nutrition Counseling for an integrative medical center, and been a paid wellness speaker. After nearly a decade, I shifted my practice to an online course business model to make more time for teaching marketing at the Southwest College of Naturopathic Medicine and the Nutritional Therapy Association, and to dedicate myself to the Holistic Entrepreneur Association.

I started the Holistic Entrepreneur Association because I truly believe that holistic practitioners can *change the world* by helping people claim autonomy over their own health and that together, we can shift the paradigm of healthcare towards a prevention-based, integrative approach. But frankly, the major problem is that most of us don't learn enough about how to actually run a successful wellness business. And to make that paradigm shift a reality, we need a *lot* of successful wellness professionals!

The HEA is here to do exactly that, for you, the functional, integrative, holistic professional. It's here to provide business and marketing education, inspiration, and a step-by-step roadmap for launching, growing, and scaling your practice. It's here to turn business confusion into clarity, uncertainty into forward progress, and fear into effective action so that together, we *can* shift the paradigm.

With love and support,

A handwritten signature in black ink that reads "Jessica". The script is fluid and cursive, with a large initial 'J'.

**Jessica Pantermuehl, FNTP, CHHC**  
**Founder of the Holistic Entrepreneur Association**