

ESTABLISH YOUR BUSINESS:

A How-To Quick-Start Guide for Health Coaches

Create a Solid Foundation For Your Business in 6 Days - *or Less!*



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WELCOME!

Thank you for your interest in my *Quick-Start Guide for Health Coaches*. If you are like me, you have absorbed much of the support from IIN but are unsure where to begin. After graduation, I found myself motivated by my new knowledge but overwhelmed with all the options. I was more interested in the nutritional teachings than establishing my business as the modules progressed so I made some effort at starting my company but felt I had many unanswered questions. One step at a time, I researched each area of business development and wrote this *Guide* with you in mind. This *Guide* was exactly what I needed when it was time to combine all of my knowledge, skills and resources together. I'm pleased to share what I learned in this handy guide for creating a solid foundation for your business in 6 days *or less!*

Inside you will find simple written instructions for establishing a solid practice from scratch. Use the information to research your own decisions or speed right to the



IT WORKS FOR ME icon if you wish to bypass the research of several options and jump on the fast track for success by following my recommendations.

REASONABLE ASSUMPTIONS

I have written this *Guide* with the assumption that you:

- Have completed (or are close to completing) the Health Coaching Program through the Institute for Integrative Nutrition (IIN).
- Have a modest desire to develop your own health-related company with the tools and resources provided by IIN including:
 - *The Fast Track Workbook*
 - Online Education Forum (OEF)
 - And other IIN online resources
- Are committed to dedicate time each day to build your practice
- Have reliable transportation, internet access, basic office equipment and supplies
- Have a quiet space to plan, work and *dream*
- Have a good idea of the Target Market you would like to serve
- Have completed Chapter One in the *Fast-Track Workbook* and have an idea of your business goals, office set-up, etc.

I wish you much success over the next 6 days (*or less!*) in establishing a firm foundation for your health-related business - and beyond.

Ready? Set. GO!

Best,
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“Begin somewhere; you cannot build a reputation on what you intend to do.”
Liz Smith, Author and Journalist

DAY 1 GOALS:

- Review Your Business Goals
- Register Your Business
- Open A Checking Account

REVIEW YOUR BUSINESS GOALS

Set aside a few minutes to think about your business goals. This process will help clarify what you wish to accomplish. Take consistent action to make these goals a reality.

What are two goals you have for the next week?

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What are two goals you have for the next month?

.....

What are two goals you have for the next six months?

.....

What are two goals you have for the next year?

.....

REGISTER YOUR BUSINESS AND DOING BUSINESS AS FILING (d.b.a.)

Assuming you are beginning your business under a Sole Proprietorship, you must register with local government to establish your business and name. A “Doing Business As”, or DBA, is a business filing that

1. protects your business name from being used by someone else,
2. allows business owners to operate a company under your name at a minimal cost, and
3. allows you to use a name without filing a legal entity, such as a corporation, partnership or LLC.

Begin by contacting your county clerk’s office to learn about local procedures and fees. You may call your local government or search for the information or form on their website (the form may also be called an “Assumed Business Name Form”). Once your form has been approved, your business is officially registered and you can start using your name as your official business name.



IT WORKS FOR ME:

Filing my DBA paperwork was simple in my area. I printed the form from the county website, completed it and brought it to the County Clerk's office with my \$10 filing fee. The Clerk completed a search for my name and processed my paperwork within 10 minutes. She also gave me three certified copies for future use.

BONUS TIP: Keep this start-up paperwork in a permanent file for reference and as documentation. The DBA form in my area is valid for five years before refiling is necessary.

Other Local and State Requirements

After registering with your local government, be sure you are complying with all state and local requirements for business operation. For additional information and requirements, explore these resources in your area:

- Township and/or city government
- County government
- State government - visit the Business section to find useful information on how to select a business structure and specific regulations for your region
- Your local Chamber of Commerce may offer assistance and promotional opportunities for business owners.
- Take a few minutes to familiarize yourself with the Scope of Practice laws in your state by visiting www.nutritionadvocacy.org. This useful website is organized by state to connect health professionals to legislation and policy affecting nutrition providers of all kinds. Learn about vital issues at stake, and consider getting involved. There is also a useful map to determine the limits of your state. This website empowers professionals to transform health through nutrition.

Other Helpful Sites

Small Business Association - www.sba.gov - the SBA provides advantages and disadvantages of each business entity and offers a search for an SBA unit in your area.

Small Business Development Centers - <http://www.sba.gov/content/small-business-development-centers-sbdc> - Small Business Development Centers (SBDCs) provide a vast array of technical assistance to small businesses and aspiring entrepreneurs. By supporting business growth, sustainability and enhancing the creation of new business entities, SBDCs foster local and regional economic development through job creation and retention. As a result of the no cost, extensive, one-on-one, long-term professional business advising, low-cost training and other specialized services SBDC clients receive, the program remains one of the nation's largest small business assistance programs in the federal government.

Service Corps of Retired Executives (SCORE) - <http://www.score.org/> - SCORE grows successful small businesses across America, one business at a time, by offering mentoring and confidential business counseling. SCORE is a nonprofit association dedicated to helping small businesses get off the ground, grow and achieve their goals through education and mentorship. SCORE is supported by the U.S. Small Business Administration (SBA), and has a network of 11,000+ volunteers that are able to deliver services at no charge or at very low cost.

Veterans Business Outreach Centers - www.vboc.org - The mission of the Veterans' Business Outreach Center (VBOC) is to help create, develop, and retain veteran-owned small business enterprises. The VBOC provides entrepreneurial training through workshops and the internet, counseling, technical assistance, and resource utilization services to Veterans, Service-Disabled Veterans, Reservists, National Guard Members, and Active Duty business owners and start-up entrepreneurs in the Southeast Region of the USA.

Women's Business Development Center - www.wbdc.org - The WBDC helps women business owners successfully achieve economic independence through entrepreneurship. From workshops and business coaching to financial and procurement assistance, WBDC supports business growth at every stage of business development.

OPEN A CHECKING ACCOUNT

Once you have your DBA paperwork certified, you can open a business checking account. Bring your Driver's License and be prepared to make a small deposit to establish your account and pay for your first check order. Visit your local financial institutions and inquire about economical small business checking accounts and other benefits. If you wish to accept online credit card payments through merchant accounts, confirm that your bank allows this service and whether they have any additional requirements (or fees).



IT WORKS FOR ME:

I visited three local banks and compared the costs and services before settling on my business checking account. Watch out for minimum balances, monthly fees, check re-order costs and debit/credit card transaction fees. I made a deposit and ordered the minimum amount of checks and deposit slips. Learn more about establishing your online Credit Card Merchant Account on Day 4.

DAY 2 GOALS:

- Review Your Target Market
- Write Your Bio
- Get A Headshot

REVIEW YOUR TARGET MARKET

You probably already have an idea of your Target Market. Determine now whether your market is crystal clear. Perhaps the general thought just needs some tweaking. Keep in mind that your target market may change as your business evolves, so be flexible and alert to emerging needs of your clients and the people in your life.

Write a paragraph that clearly defines your Target Market here:

.....

.....

.....

.....

If desired, refer to Chapter 4 of the *Fast Track Workbook* to further identify and refine your Target Market.

WRITE YOUR BIO

Your personal biography is an important marketing tool that offers a few sentences of background information to describe who you are and what you do. You may decide to write a couple different versions of your biography and use them for a variety of marketing purposes. Your bio should include details about how you can help your target market. You may also wish to include educational background, training, certifications. Refer to Chapter 7 of your *Fast Track Workbook* for more details.

If you are having trouble writing a short bio, consider answering these questions by writing out your wellness story:

- What compelled you to become a health coach?
- How have you overcome a personal setback, ailment or illness?
- Why do you want to help others?
- What are your passions in life?

GET A HEADSHOT

Presenting yourself as a professional is essential to your success. A friendly, well-crafted headshot will provide credibility and connect “a face” with the services you offer. If you don’t have a recent, attractive photo of yourself, grab a friend and have a photo session together in the park, in a studio or a well-lit room.



IT WORKS FOR ME:

I'm rather shy about promoting myself so this assignment was a stretch for me. I eventually realized its importance and began collecting different creative bios and photos of others. Then I drafted a few options of my own. To get started, consider reviewing the Graduate Profile stories and photos at the end of each chapter in the Fast Track Workbook then begin writing your own bio. Another good source is the www.mindbodygreen.com website that is affiliated with IIN. Review the photo and brief bio of each writer at the end of each article. Collect several bios and photos that you like and shape your bio and photo after those that catch your attention.

I have included my photo and bio on the last page of this *Guide* as another example.

DAY 3 GOAL:

☐ Establish An Online Presence – Create Your Website Domain

NOTE: Today's goals are written with the assumption that you are taking advantage of IIN's free website services for students. IIN offers a great service for students to establish an online presence with a variety of options which include logo design, web hosting and site building. Take time to familiarize yourself with the resources from IIN including detailed instructions and step-by-step videos on how to edit your website in the Technical Support page of your Help Center.

CUSTOMIZE YOUR DOMAIN NAME

Although not required, IIN recommends choosing a domain name that is easy to reference and remember. Once you have registered your domain name you can link it to your IIN website.

Here are the simplified steps for customizing your domain name. Be sure to read each of the supporting documents from IIN if you choose to use their fantastic Health Coach Website services.

1. **Pick a domain name** to add professional authenticity while making it easier for others to remember. IIN recommends registering your full name (www.johnsmith.com) as your website.
2. **Choose a company to register your domain name.** You may wish to research Namecheap, 1&1, Name, Greengeeks.com, DreamHost, Site5, or NetworkSolutions for a range of hosting and service options. (Note: IIN does not recommend using VistaPrint web services; their services are not compatible with IIN services).
 - a. IIN recommends that you DO sign up for domain parking, but DO NOT sign up for web hosting or website building; IIN provides these excellent services for you.
 - b. IIN recommends that you DO NOT purchase an SSL Certificate if you are using the IIN website; it is not supported.
3. **Buy email hosting.** IIN does not provide email hosting so consider purchasing email hosting from your registrar so your email can be the same as your domain. (See my note below).
4. **Link your domain.** After you have registered and purchased your new domain name, the next step is to link your new domain to your existing site. Visit the IIN Help Center for detailed instructions.
5. **Customize your new website.** Refer to the IIN materials and the Help Center for guidance on changing the theme, colors, fonts, and titles on your website.

BONUS TIP: IIN provides nice pre-written descriptions, layouts and pictures to get you up-and-running quickly and professionally. I highly recommend using their content and adding your own voice as you feel ready. Remember to consistently refresh the language and add new, interesting elements for your readers. Your website should never have a “finished date”. It should continue to evolve as your practice does.



IT WORKS FOR ME:

It was important to me to create an easy-to-remember web address instead of using the long address provided by IIN. An easy-to-remember website is essential if you would like your potential clients to find you quickly and easily.

Which is where I ran into problems.



The availability of the site address is another story. This process was time-consuming and frustrating for me and seemed to take several weeks to accomplish. Before I settled on a name, I wisely searched for an available website name (domain). I chose to use the services of www.godaddy.com to search for and purchase my domain name. This is a humbling experience, and ultimately is what determined the name of my practice. I used godaddy's free domain finder search tool and searched 70+ name possibilities before deciding the final name and website. In choosing a name, I did not want dashes or numbers in the name, and I preferred that my website extension end in .com but there are few choices left for that. So, for my first website I settled with a .org so I could move forward with the project. Recently I have moved to my name, www.sarawolfesen.com with a fresh, new layout.

I chose to work through www.godaddy.com because I have worked with them before and find their customer service above average.

Note: the availability of website names will be the same regardless of the online registration service.

BONUS TIP: If you choose to use godaddy.com, Google “godaddy coupon codes” for the latest promotions and coupon deals before completing your order. I took advantage of the .org sale and saved an additional 30% on my web domain name.

Remember to print and save your order confirmation receipt(s) and record this transaction as a business expense.

WARNING: Establishing a website presence could take several hours. If this isn't something you are interested in, or become easily frustrated, consider contacting a computer professional or reputable web designer to complete these tasks for you while you focus your time and energy on another aspect of your business.

Other Thoughts:

PROFESSIONAL E-MAIL ACCOUNT

I purchased email hosting with a godaddy coupon code BUT found the email system cumbersome and frustrating so ultimately decided to set-up a free business e-mail address through gmail.com and, as a nice bonus, realized it integrates easily into my Google calendar system.

Note: Regardless of where you choose your e-mail account, always use a professional name such as mybusinessname@gmail.com instead of a ridiculous personal name like sillygoose123@gmail.com. ☺

LOGO DESIGN

If you haven't already designed a logo for your business, take time to use the software service from IIN to create a logo design. This can be fun and encouraging. Then post it to your website, sit back and admire your work. Congratulations!

WEBSITE LOGINS:

Remember to keep your online passwords and account information organized in a safe place. I record my login information alphabetically by website name in an inexpensive address book for easy reference.

DAY 4 GOAL:

☐ Establish an Online Merchant Credit Card Account

If you choose to take credit card payments from your clients you must use the services of a merchant credit card company. Credit cards are very convenient for your clients, especially if you will be working online or over the phone with them.

Credit cards also allow a convenient way for clients to make your services affordable by setting up automatic payments or monthly installment options.

An easy way to start accepting credit card payments is to use an online merchant account service. This convenience allows you to accept credit/debit card payments, bank transfers, and more, for a small transaction fee. In most cases, your merchant service will also offer quick links and buttons for your website; which promotes a convenient option for your clients to purchase without hassle.

To begin this process, take time to understand each of these points:

- Check with your bank to confirm that your type of account is capable of accepting credit/debit cards. Your bank's Customer Service center may be able to set up a merchant account for you. Note: you may need to pass a credit check before this option is available to you. It may also be worthwhile to explore whether your bank offers a partnership with a third-party merchant account. Inquire about transaction fees and minimum transaction amounts for this service.
- If your bank does not offer merchant account set-up services, there are several online merchant options such as www.practicepaysolutions.com (which offers IIN students a discount upon request). You can also Google "merchant account services" to find other options.
- If you have a smartphone, you may wish to explore various applications available for processing credit cards. www.square.com is one option that is growing in popularity. You can also Google "smart phone apps for credit card processing". Some apps require merchant accounts, while others charge a small fee.
- www.paypal.com is a popular online service that allows clients to pay you instantly by credit card even if your clients do not have a Paypal account.
- When selecting your provider, consider the following service options:
 - transaction fees
 - account basics and upgrades
 - benefits and membership levels

- These options may also factor into your merchant selection decision:
 - Which major credit cards are accepted (Visa, Mastercard, Discover, etc.)?
 - Can a “Buy Now” button be created for each product or service?
 - Does your merchant provide a recurring payment option for clients who wish to make monthly payments?
 - Does invoicing come standard with the free, basic membership? (this is useful when confirming a service; simply send an invoice with a link for easy payment).



IT WORKS FOR ME:

I didn't have any desire research merchant service providers. So I immediately chose PayPal because of their trusted and recognized brand, reputation, attention to security, user-friendly account platform, and iPhone and iPad mobile apps.

I started with the free, basic level of service membership. I am experimenting with basic PayPal services before adding additional paid-for components to my account.

Transaction fees seem comparable to other online merchants. The lowest fees are offered by direct card swipe (through the app) or with online payments. There is usually a slightly higher fee for manual transactions.



Learn more about PayPal or set up your new merchant account at www.paypal.com.

BONUS TIP: remember to include the transaction fees when calculating the costs of your programs. For example, a \$100 session will cost \$2.70-\$3.65 in fees depending on the method of processing. It doesn't seem like a lot, but could add up over time. These transaction fees are a business expense, so record them as such.

DAY 5 GOAL:

☐ Explore Social Media: Facebook, LinkedIn, Twitter

Social media is one of the cheapest (read: FREE) and effective ways to promote yourself to your friends, community and world. Creating an online presence can be powerful, and time well-spent.

In my opinion, the following three options are the best place for a newbie to be. If time is short, choose one (I suggest Facebook) and concentrate on writing posts with valuable content and growing your contact list. There are thousands of effective ways to use social media to promote your business, which can become time-consuming and overwhelming, so I just offer the basics here.

BONUS TIP: Set some time aside this week to click-and-learn as you explore the features of each social media platform. **There is no better way to learn than by experimenting!**

FACEBOOK



Facebook is the world's most popular social networking website. Facebook makes it easy for you to connect and share with your family, friends and potential clients online. I am most comfortable with this platform, and began my existence on Facebook with a personal profile in 2011. Recently, I created an online presence by starting a business page. Click [here](#) to visit my biz page.

Follow this link for an excellent resource to get started: [Facebook for Business](#) offers a general overview with fundamentals including:

- Set up your page (a step-by-step guide)
- Identify your audience
- Create compelling content
- Advertise (with an option to create an advertisement on Facebook)
- Measure and adjust your posts

LINKEDIN



LinkedIn is the largest gathering of professionals on the internet. This business network was established in 2002 and has grown to over 35 million users. Known as an online Chamber of Commerce with 24/7 access to members, LinkedIn is an important networking tool used to generate leads and promote your business. Follow the links below to watch basic tutorials from YouTube:

LinkedIn Tutorial - Beginner by Annette Burgess (14:42 min)

<https://www.youtube.com/watch?v=wG94oHbCMwk>

LinkedIn for Dummies (7:12 min)

A step-by-step video to set-up your profile

https://www.youtube.com/watch?v=tV_7yAPnkFw

You can register for free LinkedIn webinars on a variety of topics (beginner to advanced) by following this link:

http://help.linkedin.com/app/answers/detail/a_id/530

I am fairly new to LinkedIn and am still learning my way around but have already made several important connections and increased my visibility for my coaching practice. Find my LinkedIn profile here: <http://www.linkedin.com/in/sarawolfesen/>

TWITTER



Twitter is an online service for friends, family, and coworkers to communicate and stay connected through the exchange of quick, frequent messages. People write short updates, often called "Tweets" of 140 characters or less. These messages are posted to your profile, sent to your followers, and are searchable on Twitter. Follow these helpful links to learn more about Twitter:

Welcome to Twitter Menu - FAQ and basics

<https://support.twitter.com/groups/50-welcome-to-twitter>

New User Facts:

<https://support.twitter.com/articles/13920-new-user-faqs>

Getting started with Twitter:

<https://support.twitter.com/articles/215585-getting-started-with-twitter>

WARNING: It can be overwhelming and time consuming to manage several social media accounts. Consider starting with one platform and add others as you become comfortable. But remember, you must remain visible and *engaged* with your existing and potential clients. If you decide social media isn't for you, consider outsourcing this role to a virtual assistant, but protect and maintain your image by actively managing your content.

DAY 6 GOAL:

☐ Choose an Online Newsletter Service

Newsletters are an essential tool for marketing and should be sent to your contacts at least once a month. Your newsletters should include interesting content that is relevant to your readers. The most professional way to send newsletters is through an online newsletter service. There are many options to choose from such as www.constantcontact.com, www.madmimi.com, www.mailchimp.com, and more.

Regardless of which service you choose, you will have access to pre-designed templates (or use the design-your-own option). Simply type your text into the template on their website, add photos, your logo, etc. then schedule it for delivery. After it's been sent, you can review statistical reports to learn how your readers engage with your newsletters. It also tracks the links your readers follow, along with other useful statistical tracking.

BONUS TIP: It is essential to have a newsletter sign-up option on your website to capture potential clients.



IT WORKS FOR ME:

I compared the benefits for free memberships from several companies then chose a newsletter provider that was recommended to me from my awesome Peer Coach. Cheryl said that the Mad Mimi website was easy to use and the customer service was excellent. Cheryl's recommendation was enough for me.

I opened a free account with www.madmimi.com, then easily designed a Webform and added the link to my website and Facebook page for readers to sign-up for my newsletters. Then I spent a fair amount of time designing and successfully publishing my first newsletter with their free service. Since then, I have sent several other newsletters and remain very happy with their service. This process is different depending on your provider. It is important to follow the new customer tutorial to learn how to publications, webforms and lists. The statistical reports are fantastic and I enjoy watching my contact list grow. By the way, if you decide to use Madmimi, please mention my name (Sara Wolfsen) as a referral source, and check out their referral program!



Click [here](#) to see an example of a webform and step through my newsletter sign-up process. I will send my latest newsletter to you.

Stuck on the content of your newsletter? IIN provides excellent prewritten content, pictures and recipes for 12-months of newsletters. Use their articles word-for-word or add your own unique voice and content.

BONUS TIP: enroll in the IIN Immersion program and receive an additional 12 months of content! Cool eh?

AT-A-GLANCE SUMMARY: My Get-Up-And-Go! Recommendations

If you prefer to bypass the research and hop on the fast-track for success, follow these recommendations!

TOPIC	RESOURCE	NOTES
Website domain registration (Day 3)	www.godaddy.com	Optional, you can link your IIN website to your customized domain name. Google “godaddy coupons” for special offers if you decide to purchase your own domain name.
Web host (Day 3)	IIN	This service is provided free-of-charge for IIN students. The Technical Support section of IIN has fantastic details and step-by-step instructions.
Website building and editing (Day 3)	IIN	This service is provided free-of-charge for IIN students. The Technical Support section of IIN has fantastic details and step-by-step instructions.
Email hosting (Day 3)	www.gmail.com	Set up your free e-mail account here. BONUS: If you choose to create an online Google calendar, your Google e-mail address will easily integrate to it.
Online Merchant Account (Day 4)	www.paypal.com	Free basic membership is available.
Social Media: Facebook (Day 5)	www.facebook.com	Find my page at: https://www.facebook.com/sarawolfsenhc
Social Media: LinkedIn (Day 5)	www.linkedin.com	Find my profile at: http://www.linkedin.com/in/sarawolfsen/
Social Media: Twitter (Day 5)	www.twitter.com	Follow me at @SaraWolfesen
Newsletter Service (Day 6)	www.madmimi.com	Free membership is available. Mention Sara Wolfesen as a referral source.

CLOSING THOUGHTS

Congratulations on completing the basics of your business and creating a solid foundation for your future.

I would love to hear your personal testimonies about your experience with this *Guide*. Send your personal testimony with permission to publish your name and/or website to sarawolfesen@gmail.com.

Your kind referrals to your classmates and colleagues are appreciated.

Wishing you much success as you establish yourself and change the world one conversation at a time!

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Sara Wolfesen is a counselor, workshop instructor, business consultant, and Certified Health Coach through the Institute of Integrative Nutrition and the American Association of Drugless Practitioners. She is the founder of Ideal Wellness and specializes in supporting motivated people unlock their healthy potential by providing private health coaching and nutritional education opportunities for groups. Learn more at www.sarawolfesen.com.

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