



CLIENT ASSESSMENT
TOOLS
FOR HOLISTIC PRACTITIONERS

Creating Your Premium Coaching Package - 2013 Transcript

Hello and welcome, everyone. This is Dr. Ritamarie Loscalzo and we are here for a bonus call for the CAT program. And this is not related to Client Assessment Tools per se. It's more of a business bonus to help you now that you have all these great skills under your belt for assessing people and really digging in deep. Now it's your turn to actually get out there to the world.

And so I'm put together some information about what I've learned about creating coaching packages that you can then sell to your clients.

And we'll talk about the different models and we'll talk about ways to structure them so that you're focused on the results that you bring and that people are going to be just...come knocking your door down. I realize that you may already be in practice. You may already have your own coaching programs. And if that's the case, then just watch this and maybe pick up a few tidbits here and there.

I find that every time I go to any kind of seminar or learn anything about structuring my business, even if it's something I'm already doing, there's usually some little tidbit of information that makes it all worthwhile.

So at the heart of your program, creating a program, is your life-enhancing result. What is that result? Can you put that into a sentence – or at least a paragraph or a 30-second sound bite of what the result is that you get?

'Well, as a result of working with me, people end up improving their energy' or 'People heal their digestive wounds' or 'Women get pregnant when they've been trying for a long time and haven't been successful' or 'They learn how to make really healthy meals for their kids.'

So whatever it is that your practice is focused on – your passion is focused on – that's your result, and that's what you want to be languageing your product name and the way that you talk to people about it.



So the first thing that you need to do is clarify what is your process. What is it that you do when you're working with somebody?

And when you clarify your process, it makes it really easy not just to create packages of coaching sessions geared towards a particular result, working one-on-one, but it allows you to then take that process and put it into a group process.

So what is your process? What do you first? What do you do next? And I'll go through some process-type things and I also have a handout for you which goes through that. That will allow you to just go through a process; it's a kind of worksheet and we'll work through that in a bit together.

So you'll clarify your process: 'Well, first thing I do is I take the person through a set of assessments and I figure out what their biggest obstacles are. And the next thing I do is I talk to them about their water and their hydration. And the next thing I do is I talk to them about eating more greens. And the next thing I do is I talk to them about their labs' – if you do those sorts of things currently.

So whatever it is that you take people through, you write that down. And as you write the list of those steps down, you'll clarify: 'Oh, yeah – that's what I always do. I always do this. Sometimes I don't have to do this because the person already knows about water, but you're at least going to be asking them, 'Well, how much water do you drink?'

And that would be, 'Oh, I drink this much.'

Okay, you skip that part, right? But if they say, 'Well, I drink about two cups a day,' then you're going to have the conversation with them.

'What kind of fats do you use?'

'Oh, yeah, I use margarine and mayonnaise because I heard that – low-fat mayonnaise – because I heard that those were better for your than butter and full-fat mayonnaise.'

Then you're going to have a conversation with them about fats.

So whatever that process is, clarify it down on paper so that you know what you're taking people through. You outline the steps, then you name the steps – that's kind of a fun thing to do. The naming of the steps helps you when you're talking to a person about the program that you're providing them. It helps to have names.

You don't have to do that – that's optional – but that's for sure a good thing.

The next piece is identifying your delivery system. Is it one-on-one, face-to-face with somebody? Are you offering them a three-month program? Are you offering them a one-month jumpstart? Are you offering it by sitting across from them one-on-one?



Are you doing it on the phone? Are you creating videos? That's your delivery system. And it's oftentimes a combination.

And then you add any juicy resources. You probably have some recipes you've come up with on your own and you probably have little handouts that say, 'Here's how to drink more water.' And if you don't, then you create those and you add those to the person's package. And then you enroll clients.

And it helps when you're not just selling 'Oh, have three health coaching sessions with me.'

And people go, 'Well, what does that mean?'

'Well, sign up for my Jumpstart Your Digestive Fire coaching session and what we're going to do is this. And what it includes is this set of recipes and this checklist and three sessions with me.'

Wow, that's so much more valuable than saying, 'Oh, well, I can help with you that. Come in for three coaching sessions and we should be able to get you on your way.'

Okay, so that's the process.

The next thing we're going to talk about is how to package up your system. Like I just said, saying, 'Yeah, come in and have a coaching session with me and I'll help you with that' is a lot different than saying, 'Oh, it sounds like you're having trouble with your digestion. I have a three-session or a 30-day or a seven-day or whatever Jumpstart Your Digestive Fire program and here's how it goes' or 'I have a seven-day cleanse, green smoothie cleanse program. And it's a group program and we're going to be doing it this way' or 'I have this cleanse that I take people through. It's Accelerate Your Detoxification and this is what we do.'

You identify and you package it.

What is it that you need to help that person support their diet and lifestyle changes? What is the piece of it that you? We can all do everything. We can always just say, 'Well most people have health issues and they're eating a crappy diet and we just have to take them through the steps to improve that diet. And most of them get about 80 percent better within the first three weeks to a month.'

But, really, if you identify what's needed – if you're really just working on their digestion, you may not be needing to go into talking to them about heavy metals – yet. It may get to that point if things we're doing with them doesn't work. You don't need to.

So you just – what is it that's needed to support the diet and lifestyle changes that the people you see need or the people you want to be seeing.



I highly recommend you avoid the pay-as-you-go model because what happens with the pay-as-you-go model is, inevitably, they are going to try to pack as much as they can into a session. And then they're not going to get as much because it's too much for them to handle in one session. They're not going to make appointments as you think they should to come back and build on the process.

So I believe that you work better if you just say, 'Well, I offer – ' whether it be you just offer a four-session bundle or you offer a particular package that has a particular end-result and a goal that you're working on.

When you bundle the visits with tools and e-books and recordings and recipes, then they don't balk at the price. Because people typically will go, 'What? You charge that much and I get three hours of your time? Do I realize that I work at a job where I make \$10 an hour bagging groceries? That's ludicrous. Nobody should make that much money.'

Though when you package it in a way that it's your visits, it's some e-books, some recordings, and you assign value to those things – and a lot of times those are things that don't cost you anything, especially if it's e-books. You create an e-book; you spend a little time formatting it. It can be really simple and basic. Some of my early e-books were just like so basic that I cringe at it now.

But you evolve. So you create an e-book, you create a recipe pack. You could just be 10 recipes on a 10-page PDF that you give somebody. It's easy to record, in your voice, some kind of instructional thing: 'Hey, welcome to the program and here's the first thing I'd like you to get started with and one of the things that's important is water and here's some reasons water's important and here's some tips.'

Done! They have a recording now. That makes your program ever so much more valuable and then when they leave your office or get off the phone with you, you've said, 'Okay, and here's the link to this particular recording.' Or if you physically want to put it on a CD, it costs you a buck to do that.

It's not that hard – there's a lot of tools for that.

So that makes your package much more valuable. You determine what's the easy-to-say-yes-to fees and package prices, depending on your area. If you're in an affluent area and you're working with busy entrepreneurs and executives, you can price it much differently than if you're working in an area where your target market is school teachers who are barely making a living.

So you want to package it in a way that they're going to be able to say yes.

I found when I first started doing packages that \$497 was – anything under \$500 worked. And I had a 30-day Jumpstart, which I'll show you exactly what I put in that. And people just kept saying yes to it. It's like, 'Holy cow.'



I was like, 'Oh, I never did this before,' and I'd tell them about it.

'Oh, yeah, that sounds good.'

And I was thinking \$400, \$500, who's going to say yes to that? Because up till then, I was just doing pay-as-you-go, charging people \$75 an hour.

So it was a shock to me that people – because there was so much value in it.

And then, if you offer quick sign up bonuses: 'Wow, well you know, I'm going to...if you sign up by the end of the day, I'll also throw in X or Y or Z or I'll throw in an extra half-hour coaching session' or whatever it is that makes sense in your niche and in your industry.

And then catchy names help – like your Jumpstart Your Health package, your Ignite Your Digestive Fire package or your Ignite Your Libido package or your Fit into Your Skinny Jeans package or something cute and fun that they'll remember – and it's benefit-rich. And we have a slide that I'll share with you on naming things.

So let's talk about the different kinds of methods of packing your services. And I'll share with you what I think is the most effective in terms of my business model and what I've seen and what I've seen other people do.

A monthly retainer is kind of like lawyer's work. You say, 'I'm going to pay you X number of dollars and you get this many appointments in a month and you can use it however you want to.'

And then they just automatically renew. You get them on an automatic renewal and it's...they have to give you 30 days notice to cancel.

So you may say, 'I have this monthly retainer and I'll talk to you twice a month for an hour and it costs \$300.'

Which is actually very underpriced if you're doing something like that, but then they just know that they're just going to keep on with their twice-a-month visits with you until they get everything resolved. And then you may come to a place where you say, 'You know what? Let's just see you every month instead because you really...we've managed all the things that you need to manage and let's go into maintenance mode every two months' or whatever.

And then you can change their retainer.

These packages are a great way to get started. You don't have to have a whole lot of extra stuff. You don't have to have the e-books or any other things to throw in. And people do like this – people respond to that.



You look at them, you say, 'Well, in your case, I think that it's pretty complicated. You've had a lot of issues for a really long time and I think we really need to do at least two months at once a week where you come in or we talk and I help you to build these things. And then we can reevaluate after that.'

And they go, 'Okay.'

Or you just say, 'Let's just sign you up for twice a month and go from there.'

Package two is more of a time period package. And what that means is that you have a set – a program that's called, say, the Ignite Your Digestive Fire program and it's going to take about three months for us to put into place all these great things that help support healthy digestion. And it includes this number of visits and this number of assessments and these handouts and these books and whatever else. And you're going to walk them through your system of how you restore somebody's digestion.

You may have a Jumpstart Your Digestion thing. You may have a Balance Your Blood Sugar program. You can have multiple programs that you take people through. And it really focuses on what their key issues are. Of course, within that, you're going to give them what they want – or sell them what they want and give them what they need.

So you may not be telling that we're going to have to go gluten-free as part of this because this is an important part of it, but they just happen to have to do that and that's part of the process. So there's other things you might be doing in there any might be looking at – they may have gut stuff and you're going to be working on their digestive fire and probiotics and enzymes and I really need some liver support, too.

So that's the way that that would work.

So within that period – within the time period packages, you can package them in different ways. You can even have a seven-day program – a seven-day Revitalize Your Gut program, where you put them on some sort of seven-day cleanse.

Usually when we're doing these kind of packages, I recommend a longer duration so they can really see changes. And you're really clear about what the outcome is – a 30-day energy Jumpstart or a 30-day Digestive System Jumpstart – and when you call it a Jumpstart, they know that this is just the beginning. It's the beginning: 'I'm getting my system going and at that point, I'll see what more I need.'

You can also offer a 90-day intensive. You can get a lot done in 90 days. You can really dig deep into a particular area in 90 days – something like my B4 Be Gone program, if I were to do that one-on-one with a person, that could be done as a 90-day intensive, because it's really a lot to do with getting them to manage their blood sugars.



But I could always do a 30-day Jumpstart Your Blood Sugar Balance program, where I give them the nuts and the bolts and the basics and I'm not there for more than 30 days to handhold them through, whereas if I did a 90-program, I could teach them how to test their blood sugars and I could teach them all about the diet and the exercise and then actually take them through a 30-day period, where they actually do it intensely for 30 days and I'm there to support them.

Another one is a possibility of a six-month immersion. You can get a lot more in-depth in a six-month program. And for people who have some serious stuff, the six months is good. I know that IIN teaches you to do a six-month program.

Sometimes it's a little scary for people and scary for you, too, because it's six months. 'Wow, I may learn a whole lot more and decide that this isn't the right way to go.'

So I'm thinking that, for you, getting started – if you haven't been doing this – of course, if you're a practitioner already and you want to move into some of these other ways, you can do it, but I'd start with the 30-day or a 90-day.

And at least design a 30-day Jumpstart. Number one, it's at a lower price point, so people are more likely to say yes, and, number two, at the end of the 30-day Jumpstart, you can evaluate and you can say, 'Look, you've made major headway and here's some of the things you still need to be working on.'

And then you can move them into a 90-day intensive: 'I think, if we worked together for 90 days, we can move forward on this, we can work with this. Remember how it took a while for you to get into that habit? We'll really work on this and we'll get it done.'

And then, with the six-month immersion or one-year transformation, a lot can happen in that period of time.

Another kind of time period-type package – I had a hard time deciding which bucket to put the VIP day in, but it's really...it's a time period. It's a day. And you can create what's called a VIP day and you basically spend a day with a person. And I'm going to share with you how to do that, why you would do that, and what kind of transformation you could offer somebody within that.

Alright. So package number three is just a number of sessions.

This is what people tend to be...tend to be drawn towards: 'Oh, well, it costs \$75 for one session, but if you get three sessions, it's \$200.' So we're always looking to package them in such a way that it costs less than the individual session.



Personally, I think moving away from this kind of model is the best way to go. I don't mind the retainer kind of thing as you're getting started and I don't – certainly the time period ones are my favorite ones, but I think that the packages of sessions leaves you into...then you're constantly having to sell them more sessions kind of thing. Right? It's like if they get three sessions, five sessions, what are they going to accomplish? Maybe a lot. Maybe they're one of these people who it took them five sessions to just get to the point where they're willing to get off of the sugar. And they're actually willing to entertain that: 'Oh, I'll start with this; I'll start with that.'

I had somebody who – I worked – I just looked at her notes the other day. We had gotten to – I think it was the seven-week time and I looked at some of her diet diaries and she was still having a little bit of cream in her coffee. She was still drinking coffee, she was still doing....

We'd made progress in some of the other things, but it was like really drawn out in order to get her to do the changes she needed to make. This was a woman who had 160 as her fasting blood sugar and didn't want to go on medication or go to a doctor to be diagnosed as diabetic, so she was diabetic.

When she finally did go off all that stuff, we got her blood sugars down to 80 within a really short period of time. But it just may take a lot to work with the emotional pieces of it. Right? It may be other things that you're having to deal with – their habits, their stress, and teaching them various things, getting them to start moving their body. It's going to take a while. So just giving them a number of sessions I think is harder. I think it's better to give a time period of sessions.

And of course you can have a number of sessions within that, but you're geared towards a particular result, whereas when you tend to just give them a number of sessions, you don't tend to be as result-oriented. So just my feeling – you can do it as well, however you want to do it.

So hot package naming tips – personally, I'm not real good at this. I always ask for help with this. And I love it when people come up with these great names. I just came up with a few today, right? Ignite Your Digestive Fire, Fit into Your Slinky Jeans Again – but names...language that works well in the titles – a makeover, a transformation, an intensive...eh, maybe. Jumpstart, skyrocket, immersion, accelerator – words that give people a feeling of like, 'Yeah!' Because you're really – you're not selling information. You're not selling coaching. You're selling a transformation.

What you really want people to have is a transformation and you don't do that by just giving them information. You give them really, really transformational activities. And we'll talk about orienting your sessions.



You want the title to be results-oriented. Jumpstart Your Energy – it's result-oriented, right? Ignite Your Libido – bleh, that's pretty results-oriented, right? Thicken Your Hair – there's a lot of them. If you feel like you get good results and you have specific things that generally work to help people thicken their hair, man, people will be flocking, because that's what people want. Yeah, they want more energy, but thicker hair, smoother skin, flatter belly – those are the kind of results that people really want. They're emotionally driven.

So here was my first package, called the 30-Day Jumpstart Your Energy package. And it was interesting – I just, out of the blue – this was before I even really started doing any marketing and getting any coaching for helping me to grow my business – I was like, 'I can't...I want to do something different. I'm going to see...I'm going to talk to this person. I'm just going to offer her 30 days and I'm going to give her what I normally would do, and it'll be a Jumpstart. It's like "let's get you started."'

So I offered an initial consultation and comprehensive history, which I spend 90 minutes doing. I had three follow-up calls, which were about a half hour, 45 minutes, one week apart, and my Green Cleanse program and a bunch of e-books and recipes. And all of that was packaged together - \$497.

And I was like freaked out: 'Oh, my god, who's going to say yes to that? It's a lot of money! Huh? They did! They did.'

Every time I talked to somebody about it, they signed up. It was quiet amazing. It was quite amazing. So I started doing a whole bunch of these.

The problem I had is I wasn't real good at the end of that of saying, 'What's your next step?' That's something I've learned since – that leaving people hanging like, 'Okay, they've got this going, now go have a good life,' but you could be looking at the end, that last thing – maybe you'd include a Jumpstart that has an initial consultation and then a reevaluation at the end and then a couple of visits sandwiched in between, where, at the end, you're going, 'Okay, so let's go back through. How's your digestion doing? How is your energy doing? You still having peaks and valleys?'

And you look at 'Wow, you've come really far. How much further would you like to go? Would you like to get your energy up to a 10 instead of a six? Would you like to be able to say, "I have good bowel movements every day" rather than four days a week?'

Like, before it was only one. So would you like to be able to say that...whatever...more often?'

And then you say, 'Okay, well, what I'd like you to do is consider. I have a 90-day intensive. And in the 90-day intensive, we're going to focus on these things that you still need work on and we're going to focus on how to get you the results in those areas. How does that sound to you?'



'Well, yeah, that sounds good. I really like what's happening so far and I realize I'm just at the tip of the iceberg and I have a lot more habits to change and I know that there's a lot more than I could do. Yeah. So how much is it? Sign me up.'

This is what I did - \$497.

Doing all this and practicing it with individuals and you get really good at – you know how you're going to take them through this process – then you start moving into the area of group coaching. You can do webinars or teleseminars that provide content. You can do webinars or teleseminars or just get on the phone with people and provide coaching where you answer questions. You can do a combination of group and private stuff within the context of one program.

So then providing handouts – like each week. If you're doing content each week, maybe you have a new recipe, maybe you have a checklist for how to clean out the refrigerator and what foods to get rid of. Maybe you have a checklist of...for going to the grocery store, what foods they should stock up on for their pantry. Maybe you have a checklist of the foods of the foods that should avoid and the foods that they should take when they have digestive problems or for detox.

I provide those 'foods that support your thyroid, foods that hurt your thyroid, foods that help your adrenals, foods that hurt your adrenals.' People love checklists like that because they can go, 'Oh, yeah, yeah, yeah, I'm doing that, I'm doing that. Oops, I'm still doing that. I gotta get rid of that.'

It makes it real easy. So checklists.

Menu plans – people love menu plan. Personally, I don't like putting together menu plans. I just – I find them tedious and time-consuming and I don't personally like menu plans. I just like to go to the refrigerator and see what I have and throw something together. But a lot of people thrive on menu plans.

So if you're doing, say, a group coaching program where you're getting together once a week, maybe each week, you provide them with a new menu plan for the upcoming week.

And then assessments – I love the assessments. I've given you, in module one, tons of assessments. You can pull some of those assessments out and just do individual assessments. So if you are doing a Ignite Your Digestive Fire coaching program with somebody, you may go to the list of questions and pull them out of there and just do the digestive questions out of that or the overall [organ 0:24:55.4] one.

So you can pull that together. You can pull together questions that you may ask that I didn't or go on the Internet and find them – although those are pretty darn complete.



So assessments are always good. You can have people do weekly check-ins or journals as assessments: 'How did you do this week? How often are you doing this? What do you still need work on? What are your commitments for next week?'

And then you can include videos and audios. And your videos can be demonstrations of you in your kitchen. I have one that I'm in my kitchen – I'm massaging spinach and I just throw some salt on the spinach and I massage it down. And people are like – when they watch that, they're just like in awe. It took me minutes to make that and upload it to YouTube and it's just an amazing demonstration.

So some of the things you talk to them about, you can demonstrate. And that adds so much value to a program when you have video.

And then exercises – it could be pictures of exercises or you talking them through some exercises or you actually doing them, having somebody set up a camera. One time I did that and I have a whole bunch of exercises that I have now in the B4 Be Gone program that I have a personal trainer that comes once a week and that's one of my big indulgences – I don't go to the movies and I don't buy clothes. I just like to have somebody help me exercise and push me to my max. So once a week, she comes.

Someday I plan on having it be every day that I have somebody come and push me to the max like that, but, for now, it's once a week.

Well, one time she came I said, 'Here's my camera. Film me.' And she would be explaining what I was doing and then she'd film me doing it and I could actually put those in use.

So there's a lot of ways you could do it. Set up your iPhone on a tripod and take – you could do it yourself. Right? You take a few shots, you make sure you know how to line yourself up. They don't take that long to do and they're really, really valuable for people to see.

I have one – I did a pantry makeover for the Energy Recharge program and it was an all-day seminar, virtual seminar, six hours, and I basically showed some slides and I said, 'Here's how to look for things. Now let's go,' and I sent them into their kitchens. But then I went into mine with my camera and I actually filmed and broadcast 'here's how my refrigerator's organized, here's how my pantry's organized, here's how my herbs are organized, here's how I label things.'

And people just get it. These may be things that are easy for you but, wow, they sure get it.

So my first group program was a combination of private coaching and group coaching. It was called 90 Days to Vibrant Energy. So it was a three-month program. I decided I wanted to do small group overall total, and I wanted to have six people where I would coach as a group and the other six people I would coach individually.



So the people that did the group paid me \$697 each. They had six group coaching calls. The people that did the individual, private coaching paid me \$1,497, and that included an initial consultation and then six one-hour coaching calls.

And actually, they may have been a half hour – they may have been supposed to be a half hour, but I went over. I was an over-deliverer, I guess. I was scared to death to offer people this stuff at \$1,497. I went through – I had these conversations, enrollment conversations, and I would chat with them about what I was doing and what was going on for them.

And I said, 'Well, this is what I'm offering.'

And I was so scared to say it was \$1,497 and so many people jumped on it. I would say, out of every two people – two or three people I spoke to, one of them signed up for it. And then I filled and I stopped talking to people.

And I was shocked, but I realized later it was a great value - \$1,497. It was more than I'd ever charged anybody before for anything, right? I was like, 'Okay, I just spent two hours with you and, okay, that'll be \$150.'

And then \$1,497 was huge – they thought it was a great value. And the people – they got great results. It was really great. And they got to be on all the coaching calls – the content calls. We had seven content teleseminars. We had one all-day goal-setting virtual workshop, where we worked together on having them hone in on what their goals were and what their visions were and we coached through some of the obstacles that were getting in their way. That was for the whole group.

And we had the seven content teleseminars, which was with a whole group. And I provided handouts and checklists and menu plans and recipes. I didn't do any videos for this program. It was a success. It was something that generated, let's see, three, six, nine – nine and seven – it generated about \$13,000 for 90 days of work.

And I thought it was time well spent. And a lot of the materials that I created with this formed the foundation of materials I've used and then repurposed and redone and prettied up a bit and enhanced and used for other programs.

So it's very valuable.

Again, I didn't really know what the heck I was doing. I just watched other people do it and I did it.

So here's an example of some sessions. Say you want to do a 12-session program. You want to do a 12-week program where you meet with somebody once a week. Here's just some of the things you might work through.



In your particular case, you may be working on different things. But this is some general stuff you could be working on. The very first one is usually a health assessment and goal-setting, where you're getting to know them, you're getting to know what their needs are and how to move through that.

Then – I call it a beverage swap. I call it a beverage swap because it's like swapping one beverage for another. Find out what beverages they're drinking – how many Diet Cokes, how many soft drinks of other kinds, how many coffees, how much hot chocolate, how much milk, how much juice? People think, 'Oh, I'm drinking orange juice. Isn't that good for me?'

And you do a beverage swap – you see what can you swap them. For each of the beverages that are not serving them, what could you swap them for in terms of beverages that would? And that's where you talk about hydration and how important it is to be drinking water – pure water – and that juice doesn't count as water and coffee doesn't count as water.

And, in fact, with some beverages, like alcohol and coffee, you actually need to be drinking more water to replace the water that they trigger you to lose. So you have those conversations. And I'll share with you kind of a typical session kind of flow that you could use so that you're providing just the right amount of information and just the right of motivation and coaching and interaction with them.

You can do an alkaline balance in greens for vibrant health session, where you talk to them about how some foods are alkaline and some foods are acidic and this is what it causes in your body and here's how greens play into that and here's different ways that you can incorporate greens.

You can take them through an oil change. You can talk to them about fats and good fats, bad fats, omega-3s, omega-6s, how to balance them, inflammation that gets caused by fat and how you can reduce inflammation with healthy fats. And you can give them checklists of here's the fats to avoid and here's the fats to consume and here's how much to consume.

That could be one whole session. And, really, that's enough for most people. If you're working with a lot of really sophisticated people, then they'll already be there. The audience that I tend to attract now are people who've been there, done that. They know that something's not working about it and we need to dig a little bit deeper with that.

I've done many an oil change with people. And I just – I had that whole talk memorized about how the fats get converted to inflammatory chemicals and the charts and I would show them the charts. I have that – you have that in your immune system and I think also in the allergy testing I have a chart of the inflammation pathways. You can use mine. You can use somebody else's. You can make up your own, but it's really a neat thing to do – is to show them visually.

I like the one with the little firefighters on it.



The digestive aids – everybody needs helps with their digestion. If they don't digest, the whole rest of them.... So really talking about chewing, about eating when they're calm, about enzymes, about probiotics, about foods that enhance digestion, foods that hurt digestion – that's a whole session.

You could talk to them about blood sugar balance. You can do 12 sessions on blood sugar balance, for those of you who have been in IRSPT, which is my insulin resistance practitioner training program, you know that we went through a whole process of how to do that and then probably starting it up at the beginning of July. And we're going to be taking you through how do you help people with blood sugar balance, what are all the steps. So that's where you talk to them about their blood sugar. You may not get into the testing their glucose right then, but you may introduce the concept of that. Some people really shriek at that. And that – again, like I said – could be a whole program of itself. It could be a Jumpstart Your Blood Sugar Balance or a blood sugar balance intensive.

But if this is kind of an intro kind of package, Jumpstart Your Energy Intensive, where you go through all the little systems and you just give them tips and tricks for each of the areas that are going to help with their energy.

You could talk to them about proper protein – plant-based versus animal based, excess protein and what the damages are, the importance of chewing it, the importance of amino acids, and brain chemistry.

So you can talk to them about that.

Gluten-free – a whole session could be on gluten-free, because there's so many questions. You can present why you want them to go gluten-free and then talk to them about how to do that.

You can have a stress transformation session, where you teach them some various stress transformation activities and talk to them about how stress hurts their body.

You can have a fitness session. You can just talk to them about some basics regarding fitness – a sleep session. Right? All the stuff, and if they're having problems with sleep, introduce some of the nervine herbs and the herbs that calm them down.

And then an environmental cleanup – like home and personal care products.

This could be – this 12 sessions could be a year-long program and you can have a whole bunch of other stuff in between. This could be a 12-week program, in which case you touch on some of these things and you touch on the ones that are most important for them.

Some of these can be a three-month program in and of themselves, like I said with blood sugar or with digestion. I've done like a five- or six-week program on digestion alone. I have a six-week detox, liver detox, that I put together and that's six weeks of just that.



So there's a lot of ways you can do this – I really encourage you as to look at what are you passionate about and what is the result that you want to get.

Say you decide to do a 30-day Jumpstart Your Energy for busy executives. That's going to be a little bit different than a Jumpstart Your Energy for someone who has more time on their hands, who has a more leisurely lifestyle. You'll be teaching them things about how to eat on the run as opposed to teaching them not to eat on the run – how to eat healthfully on the run.

So it's going to be different, depending on your audience.

Triathletes would be a good example of how it would be way different to teach a program that's helping a triathlete build up their energy versus someone who's a stay-at-home mom, not exercising.

So when you're putting together your programs, you want to have this flow that happens with your programs.

First of all, start by celebrating success. Those of you who have been on small group coaching calls with me – or even individual coaching calls with me – you know I like to start with what's going right. Because a lot of times we just start focusing on all the things we're doing wrong and we get really down on ourselves.

When you start the person with a celebrate success, they get excited. 'Well, last week, I talked to you about going gluten-free. Do you have any successes to report in that area?'

That may be not the best question to ask – well, I think a more general question. 'Do you have any successes to report this week? What's gone really well for you?'

And then they go, 'Well, let's see. Oh, yeah! I blah, blah, blah. When I went to a birthday party and they had chocolate cake and, oh, that's my favorite and I skipped it and I had an apple instead.'

And you're like, 'Wow!' And you celebrate it and you appreciate it and get them to really appreciate the progress they're making. Then you can explore the follow-through, like 'How did you do with the whatever? How did you do with the drinking half your body weight in fluid ounces that we talked about last week?'

And if they say, 'Oh, yeah, yeah – that worked really well, too. I'm up to like 75 percent of what I should be.'

'Wow, that's really cool.'

Okay?

'So if it's successful what helped you to do that? Because I know you've been struggling with that for a really long time. So how did you finally achieve success there?'



And you identify what helped them so that you can have that to reinforce things as you go along. And you can remind them. 'Remember how when this happened and it was really hard, but then you did this and it helped?'

And they go, 'Oh, yeah! I remember that.'

If it was partially successful, you identify what helped them to be partially successful and you ask what needs to be done – what needs to be in place for you to move it to 100 percent and let them explore that – because if you just tell them, it's not going to be as effective as if you have them explore it.

If they weren't successful and it was a low degree of success or no success at all: 'What got in your way?'

'Oh, well, you know, my father-in-law died last week and I was travelling.'

Well, that's not something that's going to be ongoing. Although chatting with them about how to maintain things, even under adversity, might be something for a later session.

But they may say, 'Oh, I just – I just couldn't stand it. I was sitting on the couch with my husband and we were watching our favorite movie and brought out the popcorn and I just couldn't resist and I just ate the whole bowl.'

'Okay, how could we have prevented that? What could you have done to prevent that?'

And they say, 'Hmm, well, if I wasn't hungry, I would've...so many I just could've filled up on celery. Or while he ate the popcorn, maybe I could've cut myself up some jicama and dipped it into guacamole.'

You just help them, and if they aren't coming up with something, that's where you dig in and go, 'Well, what if you would've done this? Would that have helped, you think?' What if you would have done that? Would that have helped?'

And you help them to create a scenario where, when you give them action steps, they're going to be successful at following through.

The next part of the session you can move into is educating them, getting them some new information. 'Okay, so, so far, we've looked at this. Let's talk about incorporating a daily green smoothie into your diet. Are you ready for that? You're ready for something new?'

'Yeah, yeah, yeah – I'm ready.'

'Okay, talk to me about it.'

So you tell them – you tell them the advantages. Maybe you show them a picture, maybe you tell them...you tell them a little bit about it and hand them a DVD to watch or you give them a recipe, you hand them a recipe or you email them a recipe if you're working online.



So you educate them.

The other thing that can help a lot is an experiential exercise. So if you work out of your home and you're teaching them about a green smoothie, maybe you go down to your kitchen and you give them the ingredients so that they can make their first green smoothie if it's their first time. And you help them to do that – or they're making an adrenal support elixir and you take them to your kitchen and they do that.

And you have them do it – you guide them through so they have the experience of doing it. Maybe if you're teaching them about exercise, you actually get up and you show them and then you get them to do it. If you're teaching them stress a reduction technique – breathing, appreciation – you actually take them through it.

So you give them something that they can actually experience, related to what you've educated them about or related to what you want them to take action on. Because the next step is giving them action steps: 'Okay – you really liked that green smoothie. How many times this week do you think you can do that?'

'Oh, I'll do it at least once.'

'What do you think about three? Do you think you could commit to three? You think you realistically look at your...?'

'Well, yeah, maybe I can commit to three.'

'Okay.'

And sometimes you have those over-zealous ones. They go, 'I'm going to do it every day, three times a day!'

And you go, 'Well, that would be really cool if you did and let's commit to something that's much more tangible and doable. What do you think you can actually commit to?'

And they go, 'Well, I'm pretty sure I can do it once a day.'

'Great. And if you do it more than once a day, that's gravy. It's extra.'

And then you close the session with, 'This has been a great session.' Kind of recap it and then, 'So what was an insight that you're walking away with that you didn't have before you came in?'

Some people call them ah-ha moments. Like, 'What was the thing that said ahh?'

And they may say, 'Wow. When you took me in the kitchen and I made that elixir and it was delicious, I realized I could do it. That was an ah-ha moment.'



So this is what you – it's not rocket science. We've gone through this whole thing with CAT and we went through all the stuff and made it seem really complicated. And that's stuff you're going to need to know when you hit walls, when you're working with really complicated cases. But you can design your sessions in a similar way.

Say last week they had gotten back the results of their amino acid test and you went through it with them and you got them to eat more protein, take some digestive enzymes with protease and make...put some protein powder in their smoothie. You can do the same follow-through and you can say, 'Okay, now your fatty acid test just came back. Let's review the fatty acid test.'

So you teach them a little bit about fatty acids.

So you can incorporate this at whatever level of practice you're doing – at whatever depth you're going into. Just keep the sessions smooth. Now, this is easier said than done because when you first start, you just...it's all over the place. And I still find myself sometimes, it's like I'm pressed for time and we just go through – we don't go through the steps.

When I go through the steps, the sessions are much more successful. And when they're going to right away start to say, 'Oh, I celebrate success. Well, you know, I exercised twice last week on Tuesday, but, God, I just couldn't get to it.'

And then they go right into the stuff that was going bad. You try to hone them back in, like, 'Let's stick with celebrating a success. Let's complete on celebrating the success. Then we'll move into what the challenges are. I'm going to give you plenty of time to talk about the challenges and be able to create a plan for moving through those.'

So it's your job to reign in and control the session. And that's a mistake I've made many a time is allowing the patient to control the session and the flow. And if you can control it, you can give them a lot more value than if you let them just rambling on and on.

And with some people it's really hard. I have somebody that's so hard to do that with. And every time I try to hone her in and try to get her focused, she's off on this and that about her mother and how hard it is to live at home and how this and that and the other thing. And it's challenging.

It's challenging for me because I don't feel like we're getting as much out of the sessions. It's challenging for her because she's spending so much time in her negativity that it's really hard to bring her back up.

So those are the ones that are going to be the challenges for you.

So let's talk about VIP days and then we'll open it for questions and then I have an experiential exercise for you.



So VIP days – so you can do them in a lot of formats. You can do them – a private VIP day that's virtual, meaning that you're getting on the phone off and on with a person all day long. And I say off and on because it's good to, number one, take breaks, number two, give them things to work on. And that gives everybody a break.

So you may say, 'Okay, we just worked on...talked about this. I want you to go for 20 minutes and write a list of blah blah blah.'

Or 'Go to your kitchen and we just talked about cleaning out your pantry. I want you to pull everything that doesn't fit these guidelines and then we'll talk about them later and make a list.'

That's a way to do it. And then you could also do it live. You could do a live one. You could do it at your own home. You could rent a hotel to do it – there's a lot of ways that you can do it.

When I've done private VIP days, it's usually been in my own home. It's challenging when you have a family. You just have to schedule around that, but I usually do it on a workday. I'll schedule it during the hours my kids are in school. And then I'll work with them.

I'll tell my husband, because he works at home as well, that, 'Look, you can be here, but you gotta be quiet. No blasting the stereo or screaming about anything or whatever. Just keep it light.'

And it works – it works just fine. And people love that, because when I do the private ones, I can take them in the kitchen. I can show them stuff. I can do hands-on work with them. It depends on what they want and what they need, really. I like to ask them what they want but kind of give them what they need with the what they want sprinkled in there.

The virtual workshops – so that's something we've done before, where you can have groups in there. That would be a group, where you have a group on the phone. I did that with the pantry makeover for the ERC program. That was...we got on and we talked about stuff. I did a webinar, like we're doing right now, and then we broke off and I had them go to their kitchen and explore their refrigerators and then come back and then talk about what they found.

People loved it and found quite a number of products that they were eating that they didn't realize were not good for them.

So you can do it in a virtual workshop format. You can do a live, small group. That's kind of fun. I haven't done that, per se, and I'd really like to do that. I'd like to invite a small group into my home and work with them – work with them for the day, have an agenda, have some things, groups with that common goal.

So there's a lot of ways you can do this. And these can be really, really fun. It's really, really fun to do this, because you get to go in deep.



If you're ever in a session with somebody and you just want to do more but time is up....you just have to be careful when you do a VIP day with somebody not to overload them with information. It's the experiential stuff that's transformative.

So every bit of information should have at least an equal amount of transformation experiential to go with it. And what kind of topics and what kind of focus can you use? Well, you can do a 'how to get started with.'

So maybe you have a 'how to get started with incorporating greens into your diet,' and you teach them about them, and you go to the kitchen and you make stuff. 'How to get started with improving your digestive fire' and so you sit down with them and you go through some stuff and then you show them stuff and you show them the enzymes and you talk about stuff. You go to the kitchen, you make really healthy digestion-supporting foods. There's a lot of things that you can do.

How to get started – step-by-step, so something that you can teach step-by-step on. Balancing your blood sugar would be great: 'We're going to, step-by-step, teach you how to take control and you can start with....' You can teach them how to do their blood sugar and they can do it. You can teach them how to make these wonderful foods that are low-glycemic. You can have them bring in their favorite recipes that they don't want to give up and teach them how to turn those into low-glycemic. There's a lot of ways you can do step-by-step.

Mastering a new skill – something that they...like the pantry makeover thing or like balancing hormones or making elixirs or making raw food or cooking vegetables or lots of things that you can choose from. And it can be just a total-immersion-into process, like if you have somebody who you're just starting to work with – rather than doing an assessment and then each of these pieces, you can do an assessment. And then you can go through like not quite those 12 sessions, because that would be a little bit much, but a section of those 12 sessions that we worked up that you actually go through with them, one-on-one.

But you intersperse the experiential with it.

When you do a VIP day – this was a recommendation that was handed down to me – keep it to four to five simple modules that you're going to go through and make them 30 to 45 minutes long, with breaks in between, either for bathroom bio breaks or, better, some experiential breaks as well.

You probably – if you're doing a VIP day, you definitely need a lunch break. You just definitely need to incorporate that. You're not going to just be this slave driver that drives people through, even if that's the way you operate. Like me, I could just go for six or eight hours, not bother stopping to eat. That's not what we want to teach people or do with people.

So you have a lunch break in the middle, you have some sessions before lunch, after lunch. You have experiential stuff in between.



You should at least have one to two activities that get them into action, like a pantry cleanout, filling out worksheets, doing exercises, doing food prep. You need to keep them going – just information is not going to cut it.

I know on some of our all-day seminars, it's been pretty much information, but I'd like to move away from those and start to incorporate those being...having more hands-on, where you break up in groups and then analyze each other's labs.

That takes a little bit more coordination from the standpoint of the course you are receiving, because then you have to get everybody to do their labs. And we've been having a little bit of trouble having that happen.

So bonuses – bonuses that you include, checklists, templates, recipes, videos, menu plans, exercises, e-books – sky's the limit. Think it through. Think about what your topic is, what you're trying to accomplish, the result you want to accomplish with this person, and what are the tools that they need to do that.

So that's pretty much what I have about creating bonus packages.