



## **Business Success: Translating What You Do with People Into a System You Can Deliver as a Program**

### **Transcript**

Hello and welcome, everyone. This is Dr. Ritamarie Loscalzo and this is all about translating what you do with people in a system you can deliver as a program. It's a big mouthful and I couldn't figure out how to shorten that and make it more succinct and still get my point across.

And it's really about how to take the systematic approach you take with people, depending on what you do, and put it into a package so that when people say, 'Hey, I really like you, I like what you do; I want to work with you,' you're not going, 'Um, uh....' and they say, 'How much does it cost and what is that like,' and you're like, 'Um, ugh, ugh...um, ugh....'

You have it worked out – you have a thought. And it can be simple and it can be very complex and we're going to go through different models. We're also going to go through how you think about what you do.

Many of you are just starting out and have not yet started to work with people on a big-term basis. And the more you work with people on a casual basis – the friends, the family, etcetera – you have the opportunity to go back and kind of peel apart the process that you do. I have a process that I work with with people. I never knew that before – before somebody pointed that out to me. And I said, 'No, everything is unique. I always work with people – it's always unique.'

But in reality, there are some common grounds.

So tonight, we're going to talk about how to identify that system that you have and then how to package it into bite-size pieces.

Depending on where you are in your practice – you may be just starting out and just working with a few practice clients and you want to get some experience under your belt, so you're going to undercharge.

You're going to charge less than you think is ideal or less than you think your time is worth and it's a very good price to pay for the valuable experience that you get.



And the more experience that you get and the more you see the results, the more you feel your value, the more you'll be able to charge for that.

I personally spent many years undercharging. I would say – people would say to me, 'Well, I'd love to have some nutrition coaching with you' and 'How much does it cost?'

And I'd say, 'Well, I charge by the half hour. I charge \$75 for a half hour.'

Why did I say that? Because I was afraid to tell them my fee was \$150 an hour. So I said my fee was \$75 for a half hour. Well, you and I both know that it takes a lot longer than a half an hour to really understand what's going on with somebody and coach them through it.

Well, I would end up spending an hour, an hour and a half with that person, but because I had told them \$75 and I wasn't comfortable with my value, and I just was scared to tell them a price that was over \$100, I would charge them \$75 for that hour and half.

And it took me years of basically not making enough money to support anybody, let alone to pay my relicensure bills and my continuing education costs and the costs of doing business. And, fortunately, my husband was a good consultant at the time and made good money.

And I then got to the point where, 'Hey, wait a minute – I am worth more than \$75 for an hour and a half. I have gone to school for a long time.' People come in and unplug your toilet and spend 15 minutes and charge you \$99. You can charge more!

So this is not so much about the value, the money conversation, because we'll do that in another point in time. This is about understanding what it is that you deliver and how you can package it in a way that feels like a no-brainer for the other person.

And that's what I want to teach you tonight. So before we jump into it, I want to review that last month's business call – our first one – was about identifying your niche, your target audience, what problem you want to solve for people.

And some of you started to do it on the call and many of you committed to going back and doing that. And what I'm going to have all of you do is 'I help people who are struggling with...' or 'I work with people who are struggling with... I help them to...so that they can....'

I help them to solve whatever the problem is and help them...and so what's the end result that they have? What's the improvement in their life?

So I want you guys to practice that and have one more chance to work on this stuff at the retreat. We're going to work on a whole combination of different things at the retreat.

So tonight I want to take it so you're able to talk to people about what it is you do in succinct sentence – get them intrigued to ask you more. And then when they say, 'Well, how can I work with you?' you'll have a package idea in mind for what you say.



It doesn't have to be sophisticated. It doesn't have to have all kinds of e-books and recordings and all this other stuff.

You start simple – and that's what I want to share with you tonight.

Everything that I'm telling you is related to education, not medical advice, and let's talk about your unique health coaching system.

Believe it or not, you already have a unique health coaching system. You may only be coaching your mother, your father, your neighbor, but you already have a system. And that's the way that you approach when somebody comes to you and asks for help. It's not really random or haphazard. It's got some system to it. And it's really nice when you can call something a system. And it would be really nice if you name the system.

So right at the center is your life-enhancing result. And what that is is what you came up with on our first call, like what it is that you do for people. Now, some of you say, 'Well, I work with women in midlife and I help them to be comfortable with the changes that are happening with their hormones.'

Others of you work with weight loss. Others of you just teach raw food recipes or teach raw food classes. Whatever it is that your result is, you word in such a way that people want that. You word it – you don't just say, 'Well, I do health coaching,' 'I do nutrition coaching,' 'I do whatever kind of coaching.' No. You talk about that result in a really juicy way.

So at the core is the result that you're targeting for. 'I help people to balance their hormones and improve their energy.'

Okay, so how am I going to put this into a system? Well, the first thing, if you go up towards the top box, where it says clarify your process – think about what you do. Think about the steps you take.

So say your neighbor comes along and says, 'Oh, I have been struggling with this pain in my stomach for three weeks and I know you do some nutrition. It must have something to do with my nutrition. Can you help me?'

And you may just be having a casual conversation in the backyard and you may say, 'Oh, well, where is it located?'

And they show you.

'How long has it been happening?'

'Three weeks.'

'Is it happening constantly? Is it just happening intermittently? When was the first time?'



So you're going to ask a series of questions and, to review those series of questions, you might go back to client assessment tools piece and look at those kinds of questions. But you already know those kinds of things, because you're just naturally going to say, 'Well, oh, you have a stomach ache. Why don't you take some slippery elm?'

You're going to go through a process to help identify what's going on with them.

And you can outline the steps that you take. So maybe the first step you can that evaluation or assessment. You ask them questions. And then the second step might be that you want more information. So you order labs. If you're in a physical situation where you can examine them, you may examine them. Or if you're not, you may ask them to examine themselves – like over the phone.

You may say, 'Well, I want you to take a measurement of your waist before and then after you eat and tell me what the difference is' or 'I want you to look to see if you have this particular skin thing.'

So it's valuation. But there's steps to it. And once you've identified what you think is the problem, then you are going to then have specific things you do. 'Oh, we're going to look at their digestion. We're going to look at what they're eating. We're going to look at the state at which they're eating.'

So this is all getting back to this example. This is all part of 'outline the steps.' What are the steps that you take when you're helping somebody to solve a problem?

The next piece is when you're outlining a system – is name the steps so you can give them names that people might resonate with. I know some folks who give them names...name the steps in such a way that it forms an acronym.

I studied with a woman who is teaching how to teach...do presentations from the stage. And she had this process she called DANCE, and each letter stood for something else.

I've come up with the process for the Energy Recharge System, which is VIBRANT. Each of the steps is a letter in the word VIBRANT.

And you don't have to have an acronym. Please – I spent way too much time trying to come up with an acronym. You just name the steps in ways that people identify.

And then identify your delivery system. We talked a lot about this in the first call was how do you want to present this to people. Do you want it to be a series of in-person visits at your office, at their home? Do you want to have it be remote, over Skype, or over the Internet, or over the phone? Do you want to be doing one-on-one or do you want this to be a group? Like a small group that you pull into your home or you meet at a local community center or an online group?



So identify the way you're going to deliver this. And as you're starting out, it's really good to get under your belt the way to do this one-on-one with people. The more you can do it one-on-one, the more you'll learn to translate it to a group.

If you've never really done this stuff one-on-one, it's kind of hard to create a group program. Because what you do when you create a group program is you take the steps that you've already been doing one-on-one with people and you move it out to a group.

And some of you, I know, are acupuncturists or other practitioners that have been doing one-on-one for a while and could translate that into a group. That's not what we're going to talk about tonight, although part of what we're going to talk about tonight could be applied to that.

Once you've identified your delivery system, like, say, a series of online coaching sessions or a series of in-person coaching sessions, then you want to add some juicy resources – things that they can use to help them put your process into place.

And that might recipes. It might be as simple as some recipes that you've written down and you've copied – photocopied. It's in your handwriting. It could be recipes you've typed into your computer and printed out, which I would recommend over the handwritten, although, if you have a beautiful handwriting, sometimes that just has a really nice flare to it.

It could be some videos – either your own or, in this program, you have access to, for the various lifestyle lessons, there's a few recipes books and there's some things that you can use and offer to people. As long as you maintain people...get people's permission and maintain their copyright, you can use other people's stuff. It's no big deal. Or you maybe have affiliate with somebody – affiliate program with somebody – where you can get their e-book at a discount and you offer that to each of your people.

As you're developing your own stuff, use other people's stuff. Don't wait all the years it takes to develop your own stuff.

And when I show you later a sample of the very first package program that I put together, you'll see that it included some resources, some juicy resources that they could use that had a lot of value to them, but didn't cost me a lot to give. Once I've created an e-book, if I'm selling it for \$20 on my website and I sign somebody up for a coaching program, it doesn't cost me anything to give them that \$20 e-book or that \$97 Green Cleanse or whatever.

And it brings up the value of what you're offering to them so that they're getting a lot of value and it's not costing you a whole lot of extra time or money.

And then the next step is enroll clients. So once you've done all this, you've got this down, you practice it, you enroll clients.



And there's a very specific way of speaking to people so you actually get them excited about your offer. You don't apologize that you have to charge money for what you're offering.

They see the value of it. They see what it's costing them to stay in the state they're in. They really feel comfortable with you and they say yes. And I have a very specific process and I'm working on getting a guest speaker in to help us to do that who's really expert at that.

So that will be I don't which of the sessions – maybe the third or the fourth. Hopefully the next one.

Okay, so this is the process – this is what you're going to go through in creating your own system. Just as an example of a process that I put together, the steps that I take with people. Right? Five steps to balance – whatever it is – these steps can be used for balancing energy, balancing hormones, balancing the immune system, balancing digestion. If you want to just focus on what area, it's wonderful.

I'm coaching a good friend of mine who is a dyslexia expert – a brain wiring expert is what we're thinking of calling her. And she's got this amazing expertise, which she's starting to package. So that's balancing your brain chemistry, rewiring it.

So you come up with the steps for you. For me, these are steps you've seen before. I use them within the Energy Recharge Coaching program.

Evaluate – that's the analysis of the personal health story and their biochemistry and that's what the CAT portion of this program, the client assessment tools portion of this program is enabling you to do. And that's an important piece to know and to be able to master. How do you analyze the physical stuff, the history stuff, the biochemistry?

Once you've evaluated what's going on with this person, what are the areas that are the weak links, then you want to educate them. So you're going to educate them about how the body works in the particular area that they're concerned about, how they can bring balance in the way that...how to access the inner healer within.

And you want to educate in such a way that it gets them excited and inspires them to take action because now they know, 'Oh, whenever I eat certain foods that are loaded with preservatives and chemicals, it's taxing my digestive tract and my liver and it's causing my digestive tract to wear down and my liver isn't able to detoxify and then it's storing a lot of my calories as fat. I don't want that happening. What do I have to do to fix it?'

So you want your education to be inspiring and exciting to people so that they're like, 'Okay, okay – I understand. What do I do next? What do I do next?'

So then you want to empower them. And the best way to empower somebody is to give them tools – to give them tools.





So it's one thing to educate and give them the steps and tell them what they need to do, but you can empower them by giving them tools to activate the body's innate ability to heal.

So what are some of those tools? Well, it may be recipes and it may be videos on how to make foods. It may be some exercises like sheets that have printed-out lists of exercises that take them step-by-step. It could be audios. You want to empower them with tools that help them to follow through with the actions that you've educated them about them needing to take.

And then you want to encourage. You want to offer compassionate coaching. You want to be there for them. You want them to know that you're on their side and you're supporting them, but you also need to do a little tough love with them sometimes – but with compassion and love.

And I'll give you an example of that. Yesterday I had a patient in. She's an elderly woman; she comes in periodically, a few times a year. She just is very stressed, very high-strung, high blood pressure. She'd just come back from an ENT appointment where she was getting fitted for a hearing aids. And the tech, the lab tech or the PA took her blood pressure and her blood pressure was really high.

Now, this woman has – she has hypertension and that's a problem. But she has white coat accentuated hypertension. In fact, it doesn't even have to be a white coat – anytime anybody even mentions the word 'blood pressure cuff,' she freaks out.

She won't do her own blood pressure cuff. She won't go to the local Walgreens to take her blood pressure. And every time I or another practitioner take her blood pressure, she's like – you can see her visibly panicked.

So she got her blood pressure taken and she went, 'Oh, boy, oh no – why do they have to take my blood pressure?'

And it was 209 over 110. The PA – first of all, I known her long enough to not tell her the blood pressure – to just sit down with her and compassionately explain to her how much I care about her and how important it is that she gets this under control and giving her some action steps.

This person that took her blood pressure was not at all compassionate, did not coach her, and did not provide support and encouragement. She basically said, 'Oh, my god – your blood pressure's too high! You're at risk of a stroke! You better get this taken care of right away.'

Well, this woman is – she's on medication, she's taking nutrients. Most of the time, she has it fairly well under control. And this woman freaked her out.



So when she came to my door, she was shaking. She's, 'I'm so scared. I'm so scared.'

So I sat her down, I put my hands on her shoulders and looked into her eyes and I said, 'Breathe with me. Let's breathe. Let's calm down. And let's discuss what's the action plan.'

And we got her calmed down. And by talking to her and empowering her – and I took her blood pressure and it was still high, but I took her through some HeartMath, we got her to calm down. She walked away visibly looking different.

It's important to be compassionate. You don't give people bad news by looking at them and saying, 'You better fix this right away.' You work with them.

When they fall off their horse and they go back and eat gluten when you know they're gluten intolerant and you don't yell at them and berate them. You understand – you try to help them to understand what the underlying cause was that caused them to go off.

So it's really important to provide encouragement. And I want you to build this into your coaching programs. If you build a coaching program that has 15-minute appointments with people, that's plenty of time to get to the meat of it and say, 'Okay, when did you last speak to me? Okay, change this, add this, change the dose of that, add this green drink, blah, blah, blah – see you next week.'

But you're not connecting. You need to make sure you build in time to connect and be compassionate. And she looked me in the eye and she goes, 'You're the only one I trust. Why are these doctors like this? You're the only one I trust. You're the only one I trust.'

And it would be nice if she could trust other people, but I inspired that trust in her. And in doing that, I got her calmed down. She's not freaking out that she's going to die any minute.

And then finally is energize. Ignite their passion and fuel action – give them things to do. Get them excited about what they're going to do. And when you do this particular food, it's going to really replenish your gut organisms and it's going to...your gut is going to feel friendly and it's going to start to repair and you're going to feel really great.

And here's what I want you to do. At the end of the coaching calls with people, I give them anywhere from one to five actions, depending on who they are and how small the actions are. And we write them down and then I check on those actions on the next call. It's like, 'Okay, how'd you do with this? How'd you do with that? How'd you do with this?' And we check in.

And it's not a matter of criticizing or judging. It's like, 'Okay, what got in the way here? Okay, what can we do differently? How can we set this up for you to succeed?'





So that's how I want you to be setting up your coaching programs and really thinking through what components you need to really connect with somebody. Don't let their budget blue you into putting it all into one visit and telling them everything they need to know.

You should not be giving them everything you know or everything they need in one visit. It will overwhelm them; it'll be too much.

And this is my little Creating Vibrant Health. You've seen this before, but this is how, if you have pieces, parts of what you do, what I like to do is look at the overall organ gland balance and balance the environment. These are my pieces. It was kind of Jerry-rigged to come up with the word vibrant. It's kind of hokey, but a lot of them are. You don't have to come up with that. You can just come up with 'these are the steps I take, these are the parts of my system.'

And when we do the enrollment conversation, I'll share with you how you can incorporate those steps in ways that connect with what's going on that's not working for them, what's going on in their life, what do they want to change, so that you can then show them how these steps, how what you're going to do with them is going to help that to change.

So we're going to talk about packaging your system. And we don't have to put bows around it. We don't have to put it in boxes. But we do have to package your system.

And I know some coaches who do this. They sign somebody up and they send them a pretty thing with some tissue paper and all this stuff. And I just don't...I haven't done that, except with the ERC, the gold program. We put stuff together, but we didn't really put it in a pretty bow or anything. We packaged a bunch of materials and sent it to them.

It would be nice. And if that's something that you're good at doing and you're patient with and you want to package something up and, say, you've included a book, it's a nice thing to do. It really is. It's not mandatory, but it would be nice. I haven't done this yet.

So package your system – identify what you need to do to support people in making healthy diet and lifestyle changes. What are the steps? What are the resources? What are the pieces, the parts?

I really highly encourage you to avoid the pay-as-you-go model. I did it for many years, like 15, and you get...you don't get great results because you don't get the person committed. You get good results if the person follows through, but they're more likely to follow through when they come on a regular basis.

And the way I learned this was I started to do some bartering with people – with friends, with people who could help me in ways – and, with that, we weren't worried about...I wasn't worried about their purse and their pocketbook and their budget.



And I'd say, 'Well, I need to see you once a week for at least the first two months for an hour, so we can really hone in and get these habits in place.'

And they got the best results. They were really committed.

And when somebody comes in and I charge them for initial consultation and I say, 'Look, I want you to come in once a week and we're going to do this and then we're going to this. I'm going to teach you about that. I'm going to give you recipes for that. We're going to adjust your supplements,' they would inevitably say, 'Well, how about if I just come in.... Yep, I'll call you. No, I can't make an appointment right now. I have to go home and check my calendar.'

And then they'd come back in three weeks instead of one because they were trying to save money. And then I'd say, 'Well, how are you doing on this?'

'Oh, I forgot about that. Oh, I didn't get around to that. Oh....'

And it was always something. I found that the more frequent visits, at least at the beginning – really important. And there were exceptions.

There's certain people who are just very sophisticated, just need a little bit of guidance. But I would avoid the pay-as-you-go model.

I would bundle your visits with tools. So some number of visits with some number of tools, like e-books or recordings or recipes or an email newsletter once a week – whatever. But you want to then determine what's an easy-to-say-yes-to price for the package.

So if you're just starting out and you don't have a big following and you haven't really built a reputation for yourself, if somebody comes in and says, 'I want to do this stuff,' and you offer them a \$2,000 package, it may be worth it, but they may be like, 'What? \$2,000? What?'

So I find that under \$1,000 is very manageable for most people – under \$500 is really easy to say yes. And I'll show you what I did for my very first program, my very first package.

And then you can just, as you grow and as you raise your fees, which you will, then you can either keep the price of the package the same and take some things out, or you can increase the price of the package.

So easy-to-say-yes-to fees – and that's going to differ based on where do you live, what's your audience. If your audience is entrepreneurial women who are struggling with fatigue and can't keep their businesses going, you can charge a lot more than if it's stay-at-home-moms who are homeschooling their kids and they're living in a low-income area.

So – and I'm not saying you should adjust your prices based on who you're dealing with. You need to be getting what your inherent value is, but you need to be looking at the package price versus the interim.



Like it's easy to say, 'Okay, just this much a visit' as opposed to 'This is what the package is.' But when you package things in with bonuses, when you package things in with like e-books and things like that that don't cost you anything but have value to them, then the price – the value – of that package goes up without it costing you your precious time and without you having to spend a lot of money on physical products to put in.

Offering quick sign up bonuses is really helpful. You don't want to do it like a cheesy used car salesman. You want to do it in a way that feels an integrity to you, where you say, 'Look. I'd love to sign you up right now and if you can sign up right now, the price is this much. But if I have to go back and we're going to follow up again and I have to get my assistant involved to do this, it's going to cost me more, so you'll pay the regular price.'

However you want to word that – that wasn't a very good way to word it, but you know what I mean. Like it has to be an integrity.

It can't be just a high pressure – I've seen this with people and I've been in classes where they're teaching a method of.... And I just don't buy it because it just feels like high pressure.

Like they say, 'Oh, I really want to do this. I just have to check and move some money around in my bank account and I'll get back to you tomorrow.'

And you go, 'Well, I can't give you that. It won't be the same price tomorrow.'

That's cheesy. That's not what I mean. But offering quick sign up bonuses, where you give them and you value them enough to give them the room to make a decision but you don't give them too much room. You want them to still make the decision. Because sometimes, when they're in the moment, when you've really gotten them to the point where they're excited about what you can do, you get them signed up. And you can probably get them signed up and say, 'Okay, great – if you can't afford the whole thing right now and you need to move money around, no big deal. Just give me \$100 down payment or a \$50 down payment and we'll hold your spot for you.'

Another way is if there's scarcity, like you really do only have room to take five people and you've got five other calls set up that day to talk to potentials, that's something you can say as well.

And then the other things catchy names help. I like the Jumpstart Your Health package, the Rebuild Your Gut, Seven Steps to a Giddy Gut – I don't know. You come up with names for the package - it helps people to understand, 'Oh, the benefit of the package,' rather than a three-session package with Mary.

So those are some of the tips I can give you for packaging your system.



And now what I want to do is look at – basically, these are basic packages that you can do, just starting out and do them easily and keep them at a price that people are going to say yes to, so you get the experience of people saying yes, and there's different models, and see what you like.

You can do what's called a monthly retainer. You have lawyers that do this – or there's a lot of professional accountants might do this. It's a monthly retainer, where they work with you on a month-to-month basis – that you have a certain fee for the month and a certain number of sessions that they get. And you automatically bill them at the beginning of each month, unless they give you 30 days notice that they're going to cancel. So that's a typical way that a retainer is going. And it is a really good way to get started, because you can come up with, 'Okay, we're going to have two sessions a month and the price is this.'

So that's a great way to get started. I really haven't done these kinds of programs...well, yes, I have. I've done a few of these.

Package type two is a time period package. And I like these better. It's a multi-month commitment, so you can present to the person, 'Well, we can do this on a monthly retainer and it will cost you this much for this, or we can sign you up for a three-month program.'

And you make the total price of the program less than it would be for them to do the retainer. And then you say – you walk them through your system, the system that you've come up with – whatever it is, the evaluation, the gut balancing, the hormone balance – whatever the system is, you walk them through that. It could be a three-month program, a six-month program, a four-month, an eight-month, nine-month, a year. I've done them at all different lengths. And you walk them through your system.

And you can adjust what you offer them based on the complexity of their case. If you see that, in three months, you're barely going to be scratching the surface with this person because they've got a lot to work on, offer them a six-month. So you don't have to have just one set program, but you can offer the people what you think they need the most.

And you walk them through your system and you provide things to keep them accountable. So you may have status reports on a regular basis. You may have forms or checklists that they fill out. You may have diet diaries or various measurement diaries, like if you measure how you measure pH or glucose or monitoring bowel movements. So you can have different diaries to keep track and check-ins.

Like so before each visit, I recommend that you have people fill out a form. I've been pretty lax about doing this. I start to do it and then I give people the forms and then when they don't do it, I haven't been following through, but I highly recommend that you do, because it really helps to focus the visit and it helps them keep them accountable.



And it's just, 'Well, how have you been doing since your last visit? What are the main things you want to focus on today? What are some of your successes?' And then you go through that – if that's in your comfort zone.

Bonus materials – really nice to include – so that could be various assessments that they could take it home and they could score on their own. How well are your adrenals doing? How well are your hormones doing?

Handouts – and that can be about anything. Well, you talked to them about water and how much water they should drink.

You give them a handout that describes it, that gives them a schedule. You talk to them about green drinks, you give them a handout, you give them a recipe. So you give them things that they can take home.

Don't make the mistake I made when I first started doing this stuff – was to give them mounds and mounds and mounds of paper. And then they come back and I'd say, 'So, as it said in that...'

'I didn't read that one. Well, I didn't get through because it was so many.'

That's too much. It's not the 'more is better,' especially when you're dealing with people with health challenges. So come up with a few handouts. I've got examples in your program – in the lifestyle modules have various handouts that you can get started using with people. And in each lifestyle module that we add from here on in we'll have more of that.

Little e-books – it could be your e-book or it could be someone else's e-book. And it could be an e-book that you...that's a free e-book that you include or it could be something that you have to purchase from somebody else, but maybe you make an arrangement. Like say you wanted to offer my breakfast book, which is a paid-for book – you wanted to offer that to your people in an e-book form.

Well, you'd come to me and say, 'Hey, I'm going to be offering this. Can you give me a special rate on that?'

And I'd say either 'yes' or 'sign up as an affiliate and you'll get 40 percent off' and then sign them up to get it, pay for it, or something like that. So I'll give you a way to do that.

You could do that with other people. You like a particular book that they have that you want to include in your program – you go to them and you make an offer and you see if you could get an arrangement made with them.

Checklists are always nice. Like 'here are the foods I want you to include on a regular basis' or 'here are all the activities you're going to do.'



And you give them checklists so that they can print them off and they can put them on their refrigerator and make sure they're doing all the things that you ask them to do.

So that's the time period package, but with bonuses added to it. I love these. I really love these. My very first one was a 30-day. I talked to you about multi-month commitment. I just came up with a 30-day one at first.

And then the third type of really basic beginner kind of package would be a package of sessions that don't really have a time limit. So you sell a package of three sessions – this is really common in massage, right? You sell a session, a package of five or three sessions so they get a discount over what it would cost them to pay for one, but then you end up...yeah.

Oh, yeah. So they say three massages, right? And so say they say three massages, but you don't give them a time limit – like you can use this within six months or a year or three months or whatever. And then four years later, you're not even doing massage anymore maybe and they're coming back, wanting their massages because they paid for them. So put a time limit – like a gift certificate 'expires on.'

And so that's a good way to do it. And it's an easy way to do it. So if you're already doing something like massage, you can have a package that might include two massages and three nutrition coaching sessions with you.

So my first package was this – I had been just doing single one-on-one stuff. And I will tell you, I offered this the first time probably five years ago was the first time I offered it – so not that long ago. 30-day Jumpstart Your Energy package – they has an initial consultation and comprehensive history with me. And it was anywhere from 60 to 90 minutes – usually it was 90 minutes. And then I had three follow-up calls scheduled a month apart. I also included my green cleanse program, which was a value of \$97, and then I included a bunch of e-books and recipes and I included basically a collection of most of my e-books and it added up to quite a big amount if they were to purchase them. But it didn't cost me to give them those e-books. The really – the investment in this program was my time. So I basically gave them – and those follow-up calls were 30 to 45 minutes – and my charge was \$497.

Very good deal and when I first started offering it, it just – anybody I offered it to would say, 'Okay, sounds good to me.' And they would do it. It was just 30 days. And then I realized 30 days isn't enough. It's enough to get started.

And I didn't at that time know about having a backend – so, 'Okay, we finished the 30 days – here's what you really need to move forward and here's what we'd like to do.' And I kind of left people hanging and didn't do that.

I'm going to teach you other ways to do that so you don't make the same mistakes as I made.





So that's basically that. So let's look at that now – how to actually put together a package. And this is your handout. This is how you can put your programs together.

So you always want to do assessment. You want to see where people are at, whether you're doing health coaching or business coaching or relationship coaching – whatever kind of coaching people are doing, there's always this assessment piece, like you want to know where the person's at.

In our case, we have the CAT module one, which is very, very good for the health history. So you can go through there and you can create some of your own basic forms or use mine and ask them questions. I know some docs don't like to use forms at all – they'll sit there and just take down the person's name, everything, all – take it down and type it into their computer as they're going.

I personally don't work well that way. I like to have it written on paper. I like to read it in advance. I like to think about what's going on with the person before I go in and talk to them.

Lab testing is another part of assessment. You may be a kinesiologist and you do muscle testing. Maybe you're...you do gate testing. Maybe you like to do that muscle response testing with those machines, the [skeo 0:39:38.1] machines or things like that.

So there's a lot of things you might do as part of what you do as an assessment. If you're an acupuncturist, your assessment might include a tongue diagnosis. It might include the pulse diagnosis. So that's your assessment piece.

So what are you going to do for your result and your target audience? What is it that you're going to do to assess – to get enough information so you know and you feel comfortable with what's going on with them?

The next piece in any good coaching program is coaching. You need to be able to coach them, and the ways that you coach them is you really need to connect, like I said before. Connect with who they are, what they envision for themselves once they solve their health challenges.

And a lot of that connection you're going to do before you even start coaching them – right on the enrollment conversation, right on the conversation where you're talking to them about what you can do to help them – that making that deep strong connection is really important.

And you're going to explain your system and your views on the role of your habits and nutrition and how that affects their health, how that affects their brain chemistry, how that affects whatever it is that the problem that they're dealing with.



And I recommend that when you're doing the coaching that you're always going back to their problem – their specific problem, not talking in general about, 'Well, the body's the self-healing thing and blah blah blah blah blah.' No. They want to hear how what you're going to offer is related to their problem.

And you want to always give them hope and something to look forward to. Maybe they were told that they have an incurable disease and they have to have surgery or be on medication for the rest of their life and they're saying to you, 'I've heard that nutrition can help. I've heard that lifestyle changes.... Can you help me? Am I doomed?'

And you give them – you don't want to give them what they call false hope. But I don't think there's such a thing as false hope, because you give them something to look forward to and they step into that. If what you give them to look forward to is the gloom and doom and you say, 'Well, I don't know. Nobody else could help you; I don't know if I can....'

You can say that in such a way that gives them hope. That doesn't make promises, but gives them hope.

And you can guide them through the lifestyle changes at a pace they can follow. It's going to be very different if you've got a PhD biochemist that you're talking to versus someone who has an eighth grade education. And you need to be able to talk to them and give them the lifestyle changes at a pace they can follow.

If you have somebody who is very slow and you can tell that, slow your pace down. If you have somebody who is very active and they're overactive, slow it down a little bit below where they're at and meet them close to where they're at. That way they can relate to you. And then give them the changes at a pace they can follow.

And I can't stress enough the importance of following up regularly, even if it's just a quick email to say, 'How you doing? Oh, this is happening, blah, blah.' Follow up regularly – build it into your programs to follow up regularly, whether it's once a week for a while, twice a month, once a month – depending on where they are in their progress, you figure that out and you offer that.

Requesting that they track their diet habits and symptoms – I get a lot of feedback both ways with this. You can use the forms that I've given you in CAT to create your own or use mine. But some people say, 'Well, I don't like to track stuff, because it's too much work and I don't have time for that and it makes me feel frustrated and it makes me feel bad about myself because I didn't follow through as much as I wanted to.'

And others say, 'Oh, my god, it's so great because now I see what I'm doing. I thought I was only eating a 500-calorie-a-day diet. It turns out I'm eating way more than I thought.'



Or, 'I thought my diet was really awful and it's better than I thought and I'm doing better and I'm going to pay myself on the back instead of beating myself over the head.'

And you get all things in between. So be flexible with people. Work with people. Don't let them off the hook because you do need to see things. If they're coming and calling you up and saying, 'Hey, I just, in the middle of the day have a headache for no reason. What do you think is going on?'

'Oh, send me over your diet and habits tracking sheet and I'll try to figure out it for you' versus they don't have it and you're going – you're spending all this time trying to ask them questions and they don't know and they don't remember.

Offer support absolutely. Offer guidance. Sometimes you have to be...offer tough love. And, yes, they're making excuses for something and you want to be compassionate, but you also want to call them and say, 'Okay, I hear you say that you really, really, really want to overcome your bloating and your gas and we've talked about how some of these foods are – eating the gluten, the sugar, the preservatives are affecting you. And you know specifically that they're affecting you. You've seen it; you've told me. Why is it – what is it that we need to do to help you to stay on track? You want one thing, but you're taking action that's giving you exactly what you don't want.'

And being firm and clear with them.

And then accountability – and that's with the check-ins. Personally, for my high end programs, my gold program in the ERC, I do a weekly accountability. And there may be some weeks where it's...some months where it's every other month...every other week, but even if not, I'll say, 'Shoot me an email and let me know how you do with that particular thing that asked you to do.'

Okay. So in addition to the assessment, which is valid... valuable, the coaching. I find it really helpful to give them training. If you're asking them to track their habits, their diet, their pH, or their glucose, teach them how. Teach them what to eat and what to avoid. Get them lists. Talk to them about why.

Help them with the transition to whole, fresh foods. Maybe that's doing a shopping excursion with them if that's one of the things you want to incorporate into your health coaching.

Maybe it's teaching a class, going into their kitchen. I've done that and that's so much fun – going into their kitchen and showing them how to use equipment, helping them to purchase equipment that they may need – a blender, a dehydrator, and helping them, showing them how to make delicious meals.



You don't have to have a classroom set up to do this. You can do it one-on-one. Yes, it's going to be more costly, but a lot of people are willing to pay it. I've had quite a number of people pay it. One time somebody called me up – she was going to be in town from Alaska. And she had been on my website and she wondered and she knew she wanted to come to a class and we were having it like two weeks before and two weeks after – was there any way we were going to have a class during?

And I said, 'Well, no. I can't do it because we've got too much going on.'

I said, 'But I could do a private class for you. You can come to my home and we can spend two or three hours and I'll teach you how to make some stuff.'

She goes, 'Would you really? Oh, my god, that's awesome.'

And I did that. And it turned out she was like best friends with one of my husband's best friends from college up in Alaska – somebody we know really well – and we just.... We did the class and then she hung out. We had a grand time.

It can be a lot of fun doing this.

You can teach them how to go gluten-free. Give them resources. Teach them why to go gluten-free, actually, and then how.

You can teach them how to exercise for optimal balance. Teach them how to manage their stress and optimize their sleep – how important it is – and then how do they do it. Why do they do it and how do they do it – and how to assess their progress, how to see when they're improving.

So those are pieces that I always like to include.

So what are the specifics of a coaching program? Well, an initial assessment is important. You saw that in my sample.

Decide how long you need. Some people like to take two to three hours to do that, especially if you do classical homeopathy in addition to the nutrition work or you have very specific stuff.

Or if you are doing an in-person visit and you do muscle testing or you do an exam – whatever you think is going to work for you, that's going to give you the most bang for your buck – the most information.

And initially you may be spending three hours or two hours and then it's down to an hour and you're becoming more efficient and you know what to do. But as you're getting more comfortable with this, it may take you longer.

And then you have a series of follow-up sessions. It can be any number of follow-up sessions, based on what you feel the person needs.



You can include training sessions or written materials. Now, I have online training sessions now, but I used to just sit with people and teach them what's a fatty acid and show them the fatty acid pathways and show them how that was related to their inflammation. And you have the tools to do that because I gave it to you in one of the modules, the ERC modules.

So good stuff.

Tracking forms are always good – give them one or show them how to make their own. But it's nice if you have one that they could at least use as a guideline.

Menus – people love menus. That's not one of my fortes. I'm not a menu person, so when people ask me for menus it's like, 'Erg,' and I don't necessarily include them, although I have included them in the B4 Be Gone program and in the Green Cleanse program because it's what people want.

Recipes – they love recipes, and especially if it's new stuff. 'I just made up this recipe – I think you're going to love it!' 'Oh, I made a recipe and it doesn't have any of your allergens in it, here's this.' Or you may have little collections that you give to everyone.

Progress evaluations are really important. Now, if you're doing a 30-day program, I still recommend adding a progress evaluation at the end. And that's, I think, a mistake I made in mine. And that progress evaluation is, 'Okay, at the beginning, you rated your digestion at this. Now you're rating your digestion at this. Wow. You've come a long way. And what's left still to fix?'

And there's all this other stuff to go.

'So what I recommend is that we get you going on a three-month program – a less intense program where we're going to see each other, talk to each other every other week and we'll have an evaluation at the end of each month or at the end of two months – six weeks – or at the end of the three months.'

So you build in the progress evaluations and that helps them to see the value of what you've been offering. You always want to make sure that they see the value of what you're offering – that they're not just going, 'Oh, I don't know.'

And then you ask them and they had a headache that used to be a 10 on a daily basis and now they have a headache that's a one every other day. Whew! That's huge progress – huge.

And then, for me, I like to have an email component to it. And this is interesting how this evolved. I would have somebody come in and they'd pay me for initial visit. And, after the initial visit, I wouldn't explain to them that email – that in order to get more coaching from me, they had to pay for it, because they'd already paid way less than what the amount of time I'd given them, yet they would.... I didn't create the boundaries.



So what I want you to do is create the boundaries. And the way you do that is you incorporate that. And if it's not included in all your programs, like say you have a lower end program that it's not, but it is included in the higher end programs, you make sure that they see the comparison. So when they see that they took the \$299 program instead of the \$599 program, that they see that, 'Oh, I don't get to email her with questions. I have to wait till my appointments.'

Some things – for my high end program, I include a chat. It's basically like a Skype thing and some people do it the text, because that's easier for them. Some people do it via Skype and most people do it via my chat. And it's just an alternate to email when you have a lot of email and things get lost in the cracks. It keeps it straight.

But email – you give them your email address. Maybe you set up a private email address that's just for your coaching clients so you give that priority and it doesn't get lost in all of the crazy stuff that people forward to you when you get on people's lists.

So – but the other thing I include is laser coaching – what I call emergency coaching calls for people in my high end programs. So if they're feeling like, 'Ugh, I just – I can't wait till my next appointment. I have a question and it's really not something that's easy to answer over email because it's going to back and forth, they'll shoot me a message and say, "Hey, when you have time? I have a quick question."'

And I honor that. And it's been wonderful because it is a great value to people to have unlimited access. But, really, they know – they respect it. They're not going to just call me because they split their toenail and they don't know what to do. So yeah. It's cool stuff to put in and it's all about the value that you're giving people.

And then the extras – that's the e-books and the extra videos or audios or things like that.

So what you need to do in order to put together a little program is make some decisions. And you might be thinking, 'Well, I just...I'm just working at a full-time job right now. I don't know...I'm not ready to do this.'

You're ready to do this. You're ready to do this.

Think of all the people who you are multiple steps ahead of – even if you just put together a two-session consultation to help them clean out their pantry, to help them go shopping – wherever you feel comfortable. You don't have to be doing labs in order to be valuable to people. You create the program wherever you have the expertise right now. And you start telling people about it.





You start really mastering that statement I gave you last month about what you do and who you do it for. And then you enroll people. You say, 'Well, we can do like three sessions and I can come to your house and show you how to make food and you can come over and I can do this' or whatever it is that you feel comfortable at this point. Just start doing it.

You don't have to charge much at the beginning, just – or you could do it for free. You could say, 'Look, I'm looking for help. I put together this program' – maybe it's your best friend or a friend of a friend – 'and I'd really love to offer this to you just as my gift in exchange for you just being there to tell people how good it was for you – to make a testimonial.'

So the decisions you want to make is how long do you want to coach people for.

It's very interesting – I had somebody that came in for a consultation – over the phone I think it was. I didn't even know her, but she had been recommended by somebody and I said, over the phone, 'Well this is this.' And I signed her up for this Jumpstart \$497 program.

And when she came in the first time, she was a whiner and a complainer and I just didn't get a good feel that she was going to follow through. But she wanted the help and she'd already paid her \$497 and it was at that point that I wished I had screened her more or I had only signed her up for one visit.

So if you do enrollment conversations – and we'll talk more about those probably in the next one at the end of March – then you can get to the point where you can do the process you know works to get people excited and get them to say yes. But if you're not getting a good feel for that person, you can just give them some advice and say, 'Have a good life.'

Like, 'I wish you a lot of luck,' and don't make an offer. And don't get them excited about your program. So you're in control. You're in the driver's seat.

And you may think, 'Oh, I would never turn anybody away.'

And it's very few and far between, but sometimes you just get a sense that there's no way you're going to help this person. It may be over your head. It may be that the person is...you can tell that they're just not going to follow through and you don't do it.

I mean, I haven't done that very much, but there have been a few people where it's been like, 'Er, I'm not sure about this person. This is going to drain my energy. I don't think I want to do this.'

And I didn't say to them, 'No, I don't want to work with you.' I just didn't make my offer. I didn't really make it exciting and compelling and really describe what I could do and how I could help them.



So you want to know how many sessions, what's the length of each session. If you don't feel comfortable working with somebody for a half an hour – you feel like you need an hour, and hour and a half, then do it. You'll learn how to be more succinct or not, you'll learn what you really like, and then you'll learn to charge accordingly.

You want to decide if it's in-person or on the phone. I find that it's less time-consuming for me to do on the phone because you can say, 'Okay, we have five more minutes. Okay, great. See ya,' and you hang up, versus when they're there, they'll go, 'Oh, I have just one more question.' And meanwhile, your next appointment is waiting.

So it's really a little bit easier on the phone, but on the other hand, you don't get to look in their eyes. You don't get to connect physically.

Like doing it on the phone would not work with the person I was telling you about yesterday, with her hypertension. She needs the connection. The therapeutic in-person connection with her and I is a big part of why she keeps coming back.

It could be an individual. You could do small groups. I would encourage you to do small groups before you do large groups. My first group coaching program, I did 12 people, I think – 13 people, something like that.

It was in two separate groups. One group had individual coaching on top of the group stuff and one group – one just had a group coaching call. And that was big enough.

I had a lot of experience at that point, because if I hadn't, I probably would have started with six people in a group and just really....

And it depends on what you're coaching them on. If you're coaching people who all have arthritis, say, and inflammation, it's really nice to have a group, because you can use flip charts or you can use slides or you can use materials to show them like why what fats they eat is so important and why they have to get their digestion under control to get their inflammation under control and why they have to avoid their allergens.

And it's nicer to do it with a group than individually. And you know I've done this by doing these kinds of things and making the recordings available, because not everybody can make it.

And then what extra materials?

And then are you going to add SOS access, like I said? Are they going to be able to email you or call you or text you or whatever? And you have to be careful with that. You don't want to create a co-dependent relationship, either. You want to be able to create a relationship where they are empowered to take charge of their health and you're coaching them and guiding them. You're not doing it for them.



And then any other things that you want to include.

So here's an example of the process. These are the building blocks of your program. So once you have identified building blocks that you feel comfortable including, you think about what steps will you take your client through. Ideally, each step is clear and reflects a benefit that that person really wants.

So step one might be discover what's getting in your way so you can get what you want. Create a vision that inspires you to make the right choices. Eat energizing foods and enjoy what you eat. Design a short burst fitness routine that melts away fat. Deepen your sleep so you wake up refreshed and burn fat while you sleep. Time your meals, exercise, and sleep to optimize fat-burning and conquer stress and think clearly in just minutes a day.

These are steps that you might guide somebody through. You don't have to be knowing everything in the world about their...you don't have to be addressing each and every individual organ or gland system. You address the lifestyle habits. They tell you what's going on and you create a program like this.

So these might be the steps that are in your process.

And what I've given you is a worksheet and those of you who were in IRSPC, it's practically the same as that. And it's basically a coaching program design template. And you basically title your program. If you don't have a good title, just kind of write a few benefit words. You come back and do that. What's the problem that you're solving, who's the target audience?

So my friend that I'm coaching with the dyslexia – her program is called Dyslexia No More. The problem solved is learning disabilities and the discomfort in the family that comes from having a child who's just frustrated all the time because they can't learn.

And target audience – well, it's parents of children with dyslexia. And then she would list the benefits and the results, and there's a long list.

And then the format of delivery – well, she decided that she does one-on-one and she does...she also has an online program. So one-on-one delivery.

The timeframe – for her, it's...I think it's 20 sessions over the time period of no more than three months, because she needs to have the work she does close together.

If number of sessions, how delivered – hers are in-person sessions.

And additional elements – well, she has a Dyslexia No More kit. She has a book that's coming out in a few months on dyslexia. So she may have some charts she shows people. She does talk to them about nutrition, so maybe she'd offer some recipe guides and menu plans.



And then you could talk about the process. The process is not something you're going to talk about with the client. That's for you.

And then the pricing.

And I left a place for you to take notes.

And so I would like you, for homework – homework, homework – is to create a plan for yourself. The first step is to just identify what the steps are that you take people through. And if you're not doing this actively, what are the steps, based on what you know so far, that you will take people through?

And notice I said 'so far.' It doesn't have to be steps like that you're going to do, like, 'Well, in six months, when I master how to do the adrenal testing and know how to do that, I'll wait to do my program until then.'

No. What do you do right now? You know how make green drinks and green foods. You know how to incorporate exercise into life. You know how to balance digestion and, if you don't, you go back to the digestion module. You'll soon have a sense of how to do adrenals and thyroid more thoroughly because we're doing that next week. You know about alkalizing someone's diet. You know about calming inflammation.

All of these are pieces that have already been presented in this program – you have enough to go on. Don't let indecision and lack of confidence hold you back. Just do it. Start with people who are comfortable with you. Start with friends of friends. Start with people and offer to do it in exchange for something if you're concerned about charging money when you don't have the experience.

You always have to start somewhere, and I encourage you to do it.

So I want you to complete this and bring to the retreat your program design and bring to the retreat your niche. And if you don't have one by then, well, we'll help you work on it.