



AFPA

HEALTH, NUTRITION & FITNESS

Health & Wellness Professional

Business Toolkit



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Introduction

Welcome to the Health and Wellness Entrepreneur's Business Toolkit! And congratulations on taking the reins and forming your own business! With technology increasingly advancing, we're now at a point where it's easier than ever for anyone to take their careers into their own hands and run a full business with just their skills and some basic technology.

Still though, running a business requires a lot of behind-the-scenes mechanics that most people don't realize until they start their own. And in the beginning, that can be an exciting but scary time. You're taking ownership of your career and being your own boss! But playing manager, marketer, assistant, and basically every other role you can think of is a lot to take on—even for serial business owners.

When first starting out, it's important to have a good business sense and operational foundation to set the pace for your business going forward. But you shouldn't have to blindly navigate through the process. Even if you don't mind a trial-and-error approach, it can still be costly and time-consuming.

This toolkit is designed specifically to arm health and wellness entrepreneurs with the resources and tips you need to prepare for, attract customers, and manage your business from A to Z.



Important Pre-Launch Tasks Before Starting a Successful Health & Wellness Business

Starting your new entrepreneur journey is an exciting time. You've decided on a career path that inspires you, made arrangements to get certified, and now you're eager to book your first customers and get to work. It's important to remember not to put the cart in front of the horse, though.

Two of the things you'll learn as you go through the adventure of running your own business is that there's a lot of behind-the-scenes decisions to be made and cogs you'll need to have perpetually in motion if you want it to run smoothly (and be a contender against your corporate competitors).

It's important to start off on the right foot. Not only will many of the choices you make now have a domino effect on future decisions as your business progresses—but establishing a few baseline housekeeping decisions will save you a lot of confusion and frustration down the road.

A few of these are likely to be no-brainers to you, while others may have never crossed your mind. Each step is equally important and vital for the long-term success of your business (and yes—big corporate brands employ these same steps to make sure they launch successfully, too!).

- Choosing a name
- Setup
- Pricing





Tools to Help You Choose a Name

One of the biggest decisions you need to make about your business is what you plan to call it.

Naming your business is also one of the **first** steps you need to take. Because without it, you can't advance to additional tasks like opening a business bank account, registering and licensing your business, or even setting up a website domain. Picking a name is also important for your branding.

Your first piece of homework is to [brainstorm some potential business names](#) (even if you have a couple in mind already). And while coming up with names, keep in mind a few boxes your name has to tick off to make sure it's really the right (and best!) one for your business. Things like:

- Is it easy to remember?
- Is the service or product I provide clear from the name?
- Are my competitors using the same name or something similar?
- Are the website domain and social media handles for that name available?

Business Name Generator Tools

To help you navigate the murky waters of choosing the perfect name for your business, use a name generator tool like [Namelix](#). Even if you don't feel comfortable going with one of the names it provides, it can still be a great base to start from or get your own creative juices flowing.



Our Favorite Business Name Generator Tools:

- [Namelix](#)
- [Novanym](#)
- [BrandBucket](#)
- [Shopify](#)

How to Use It: You plug in a few keywords that describe your business and answer a couple of questions about your preferred name style. Then, the software uses AI to generate a list of potential business names in less than a minute.

PRO TIP:

Namelix is great for unique, AI-generated names. Novanym, BrandBucket, and Shopify generate names and simultaneously check domain availability.

Business Name Generator Tools

Remember, just because you found a name you like doesn't mean you're out of the woods yet. You need to make sure it isn't already registered to another business in your area or already trademarked by someone else. The first thing you need to do is inquire with your local Secretary of State agency to see if another business with your potential name already exists.

Once you're cleared there, use an LLC registration database like LegalZoom to make sure your name isn't registered to someone else.



Our Favorite Business Registration Databases:

- [LegalZoom](#)
- [Incfile](#)
- [National Corporation Directory](#)

How to Use It: Most of these tools are pretty intuitive. Input the business name you're considering and the state of your business, and the software will search its directory for your business name and let you know the results.

Business Name Trademark Availability Tools

It's also important to remember that just because a business with your name doesn't exist now doesn't mean someone hasn't already started working on it. Before finally settling on your business name, make sure no one else owns it first. A simple trademark check from the [United States Patent and Trademark Office \(USPTO\)](#) will let you know if you're in the clear or not.



Our Favorite Trademark Availability Tools:

- [USPTO](#)
- [Trademark Engine](#)
- [World Intellectual Property Organization](#)

How to Use It: Again, these databases are pretty much plug-and-play. Just enter your business name into the search bar and let the system do its work.

PRO TIP:

Don't forget to check your logo to make sure it isn't too similar to an already trademarked logo or design, too..

Friends, Family, and Focus Feedback

The reason movies and novels have full-time editors review them is because it's difficult for people to self-edit their own work—even professionals. Sometimes being too close to a project clouds our objectivity. That means we can't always trust our own judgment and it's easier for us to miss things, too.

So, it's important, even if you feel like lightning struck and this is THE name for your brand, to test it out. It might make perfect sense to you, the person behind the brand who knows all its ins-and-outs. But to someone who doesn't know and has never heard of you, (like a potential new customer) who isn't in on the joke, your name shouldn't confuse or leave them questioning what you do.

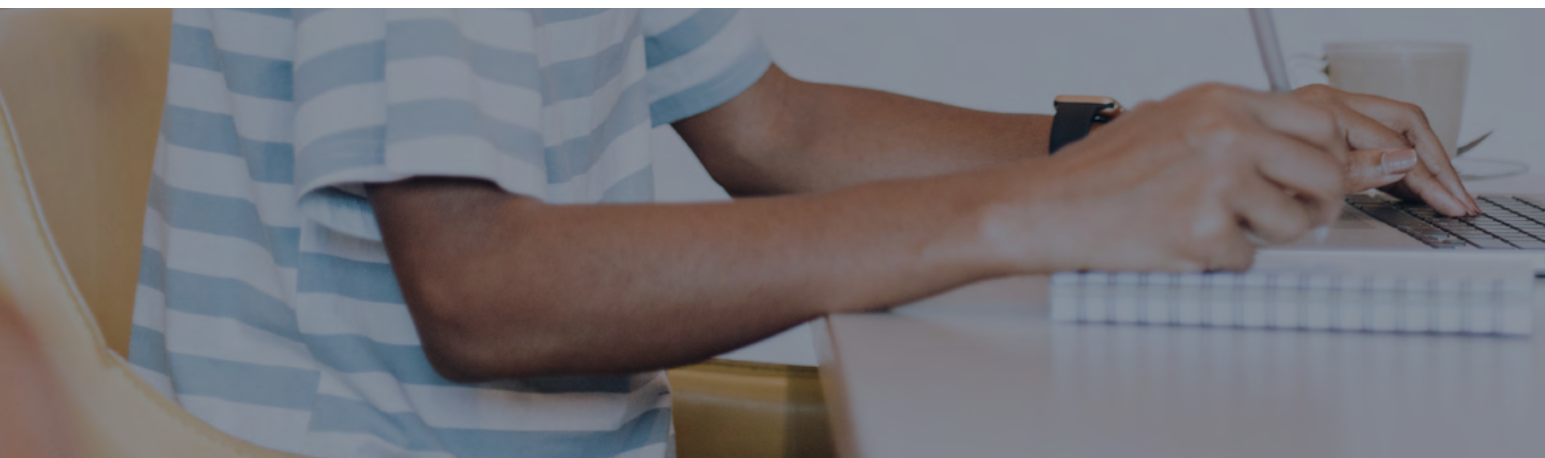
Without much explanation, run your business name by family, friends, and even a focus group of your target demographic to see what they think. If they respond positively and have a semblance of what your business is about without too much explanation—congratulations! You may have landed on your perfect business name! If you're finding you have to explain too much or people aren't vibing with your name, take some (constructive) criticism and use it to create an even punchier name!

A focus group of your demographic will be your best source for relevant and insightful information. These are people you want to please because they'll (hopefully!) be your customers. You should definitely weigh their opinions heavily when they provide feedback. Use an easily shareable survey like a [Google Form](#) to solicit and aggregate feedback on your business name (and anything else you'd like feedback on for that matter).



Our Favorite Tools for Feedback:

- [Google Forms](#)
- [TypeForm](#)
- [SurveyMonkey](#)



How to Use It: You'll need to make an account so you can create, save, and view your surveys. Once you are ready to go, just intuitively build out your survey by inputting the exact questions you want your focus group to answer. It can be as short as one or two questions or up to several pages long. Some example questions might include:

- Do you understand what this business does based on the name?
- Is this name easy to remember? Do you think you could recall it a month from now if you needed the service it provides?
- Is the name easy to pronounce and spell? Would you be able to find it on Google if you had to manually type it out?
- Do you like this name? Does it resonate with you?
- What do you think of when you hear/read the name?

Once your survey is complete, the platform you chose will provide you with a link that you can share with whoever you want to take it. If you don't have access to people who would be your ideal demographic, ask friends and family to share your survey with people they know who are or could be potential customers. Your platform will record all their answers, so you don't have to know them personally or reach out to them if that's outside your comfort zone.

PRO TIP:

If a name that you absolutely love is already trademarked or registered, consider a slight alteration to your version (alternate spelling, combining words, etc.) and check its availability.



Initial Setup

These aren't the most exciting steps, but they are necessary maintenance before you should start accepting any official work. Be prepared to run into paperwork and fees here. Once you're through it though, your brand will be that much closer to feeling like a real business, and you'll have taken a HUGE leap toward your goal as a health and fitness entrepreneur.

- Registration
- Licensing
- Legal protection
- Insurance

Registration

Technically, you're already halfway done with this step since you were proactive and checked on registration while you were coming up with a business name. But now that you've settled on a name and you're ready to get the ball rolling on actually launching your business, you need to get it registered.

Whether you decided you want to identify your business as an [LLC, LLP, or Sole Proprietor](#) depends on your personal and business needs, obligations, and finances. Once you determine which is right for you, you'll need to register your business with the government.

When you are ready to register your business, you can personally do it by filing with your local Secretary of State, Business Bureau, or Business Agency. Which you choose depends on what state you register your business in (it doesn't necessarily have to be the state you live in). You can find out which entity you need to file with [here](#).

PRO TIP:

If you don't want to handle registering your business yourself, you can hire a registered agent to do it for you. They'll charge a service fee (typically \$50–\$100) on top of the local state fee you'll have to pay in order to file. The benefit of a registered agent is that you just give them your basic info and they'll handle all of the paperwork and filing for your business. And if you don't want to list your personal address (if you don't have a brick-and-mortar location) as your publicly listed business one, a registered agent can provide theirs instead.

Licensing

Not all business licensing is created equally. What an entrepreneur needs in licensing varies depending on their specialty, what products or services they offer, if they have a physical location—and a million more stipulations if they do. So, many of your licensing needs may be specific to you.

As a health and wellness entrepreneur, you're already aware of the importance of becoming licensed and [certified from accredited educators](#) to ensure you're giving your clients the best care and guidance possible. And many states and insurance agencies require certain wellness professionals (like [nutritionists, dietitians, and health coaches](#)) to be licensed and or certified to legally work or receive benefits.

If you have a physical location you plan to sell food and drinks (especially alcohol) from, you'll likely need a state permit, too.

Insurance

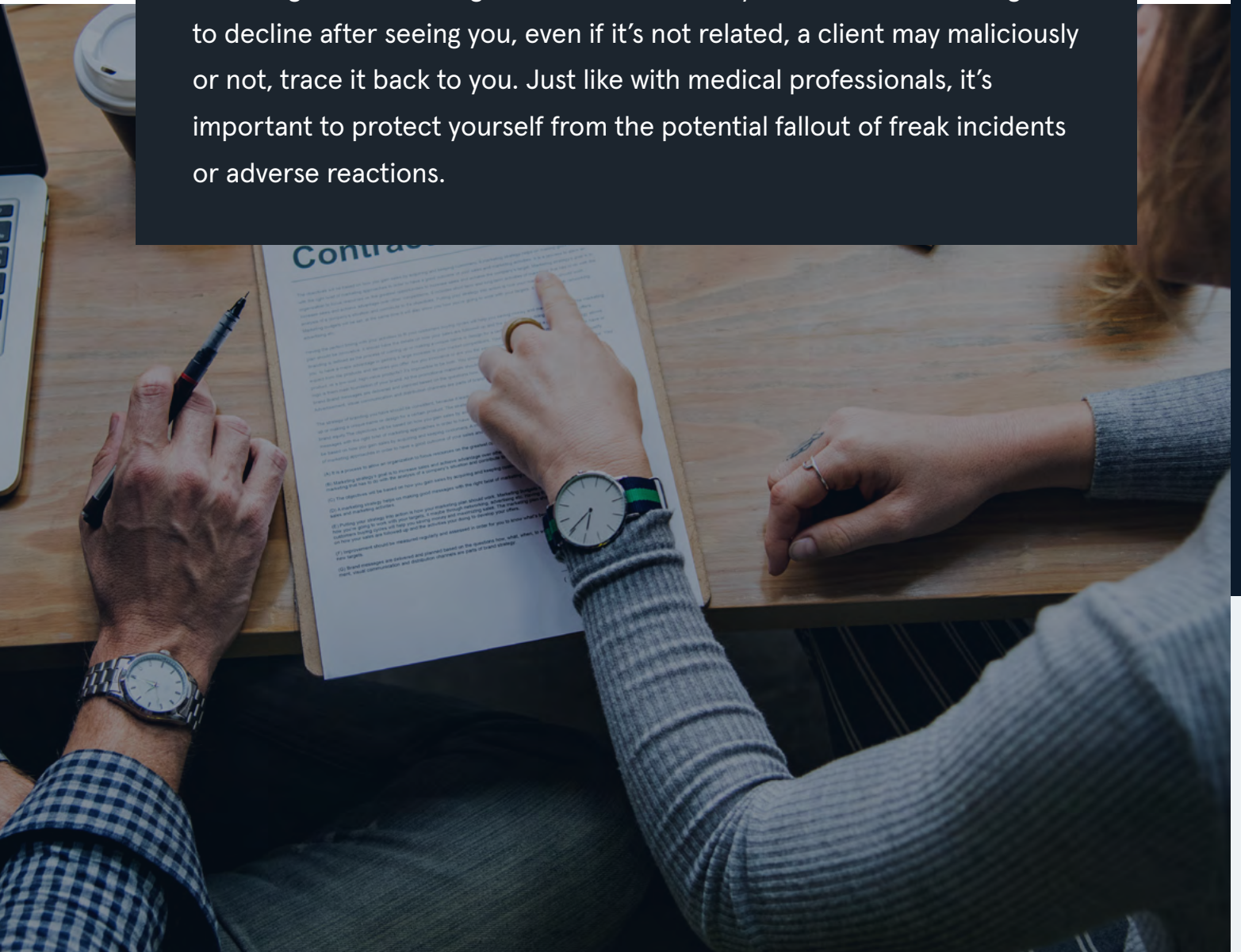
Insurance is the next task to check off your list. (Don't worry—you're getting so close to launching!) Murphy's Law isn't just a hypothetical. Even for businesses, things can and do go wrong. Hopefully, they don't, but just like with your health, car, and home, you'll save yourself a lot of time, money, and hassle if you're insured. Insuring your small business can safeguard you from things like:

- Negligence claims due to mistakes or accidental failures
- Equipment or inventory recovery due to property damage
- Liability protection from defective or damaging products
- Lost income due to "Business Interruption"

What type of insurance you need is just as unique as your business. Browse [AFPA's health and wellness entrepreneur insurance resources](#), and if you think you might need guidance to figure out where your business lands, contact a financial advisor.

PRO TIP:

We recommend at least getting liability protection. This sort of protection is especially helpful for health and wellness professionals who offer coaching and consulting businesses. If one of your clients' health begins to decline after seeing you, even if it's not related, a client may maliciously or not, trace it back to you. Just like with medical professionals, it's important to protect yourself from the potential fallout of freak incidents or adverse reactions.



A photograph of two people sitting at a table. The person on the right is holding a white tablet. The person on the left is holding a pen and looking at the tablet. There are two white coffee cups on the table, one on the left and one on the right. A spiral notebook and a pen are also on the table. The background is blurred.

Legal Protection

Keeping with the theme of protection, it's a good idea to get a handle on your legal protection as well as your insurance. As an independent consultant, you personally are much more vulnerable to legal trouble than a multimillion-dollar corporation. Legal protection benefits for a health and wellness entrepreneur might look like:

- Law-binding contracts between you and your clients
- Copyright/patent protection for qualifying original products or content you release

Contracts and Service Agreements

Just talking about contracts can be intimidating and cumbersome to people, but don't let it scare you. Contracts and service agreements are to protect you AND your clients. When done right, they're a win-win and hold all participating parties accountable.

Contracts set and establish the working agreement between you and your clients. They should cover the entire scope of your project down to even the most minute detail. A few of the major terms your contract or working agreement should outline are:

- Payment (both specific amounts and payment schedules)
- Dates (duration of working relationship, meetings and classes)
- Policies (late fees, refunds, cancellation, termination of service)
- Deliverables (what YOU provide to the client)
- Etc. *

*This list isn't exhaustive. While you should definitely make sure ALL of the above is covered in your client contract, it's possible you'll need to outline even more depending on how your business operates. So, it's important to do your diligence and make sure every part of your working relationship is detailed and outlined. That way, even if a rare issue does occur, there's proof to hold each party accountable.

Because every business (and business owner) has its own nuance, there's no one-size-fits-all contract. If you want something specifically crafted to your business and operation model, it's best to [contact a lawyer](#) and have them draft it. But you can always use a service like [LegalZoom](#) to find vetted contract templates you can customize for your business.





Our Favorite DIY Contract and Service Agreements:

- [LegalZoom](#)
- [LegalShield](#)
- [RocketLawyer](#)

How to Use It: Before or after creating an account (depending on the platform), you'll be able to either search for a similar template to what you need or jump right into a standard one. The platform will ask you a series of questions about the agreement (all those important key details mentioned above). When you plug them in, the software will begin to populate the contract with your unique answers. In some cases, you'll have the opportunity to dive into more detail if one or two lines just won't cut it. Sometimes you NEED to go into more detail, and that's ok. Your contract definitely ISN'T the place for obscurity.

By the end of the prompts, you should have a completed and detailed contract or service agreement that outlines your working details, including what's expected of you and your clients. Then just download and email to your client to sign.

If you want a platform to also send, track, and manage your contracts, you can do that, too.





Our Favorite Tools for Contract Management:

- [EverSign](#)
- [Adobe](#)
- [PandaDoc](#)
- [HELLOSIGN](#)

PRO TIP:

ALWAYS have a contract or service agreement. And NEVER begin work before you and your clients have both signed. Even with friends and family, sometimes things go wrong or misunderstandings turn into huge (but avoidable) problems. Remember that **a contract protects you AND your clients.** There's never a reason not to have one.



Copyright and Patent Protection

In most cases, health and wellness professionals don't need copyright protection as a normal part of their jobs. But if you offer written or video resources or a unique new product (guides, how-tos, instructional or educational videos, branded fitness gear, new and unique tool or device, etc.), you should consider legal protection for them as well. Namely, to prove you are the owner should someone try to use them without permission or profit from your work.



Our Favorite Copyright and Patent Protection Platforms:

- [Copyright.gov](https://copyright.gov)
- [USPTO](https://uspto.gov)
- [LegalZoom](https://legalzoom.com)

How to Use It: It's important to follow the step-by-step instructions each platform provides. There are a lot of steps and different forms depending on what you need, so be thorough and diligent. And keep in mind that you'll almost certainly need to be represented by an attorney to file. There are specific [attorneys who specialize in patent law](#).





Pricing

Being a health and wellness entrepreneur means you're your own boss—and as such, you can set your own rates. But it's not as simple as throwing out any number that sounds good and sending out invoices. There is a deliberate rhyme and reason as to how you should calculate and set your prices, and you'll definitely want to have that figured out before you start sending out quotes.

It's important to have your pricing structure account for not only your income but all of your operating fees and even personal costs that would typically be covered on a full-time salary (like health insurance and retirement savings).

So, when calculating what to charge clients for your services, consider these factors:

- Desired income
- Overhead costs
- "Entrepreneur tax"
- Billable hours

- Market and economic conditions
- Your clients' demographics

Desired Income

The first question you need to ask yourself is how much money you want to make. That is, how much your final net income will be. It's easiest to calculate it by the hour (even if you don't charge hourly), but you can also go by monthly/yearly salary. From this point, you'll have to work backward to make up for the additional fees you'll incur from owning a business.

So, if you want to bring home \$25/hr, you may need to actually charge \$40/hr. This is why it's so important to start with this step and work back. If you charge your clients what you want your take-home to be, what you actually end up with after all your expenses will be disappointing, to say the least.

Overhead Costs

Overhead costs are anything and everything you have to pay for that it takes to run your business. This is all of your business expenses, including many of the operations tasks we'll mention later in this toolkit. Overhead costs could include:

- Rent/Mortgage (for physical locations)
- Utilities (for physical locations)
- Taxes (you'll have to take out your own now)
- Supplies and equipment
- Business operations software subscriptions
- Staff payroll
- Insurance and legal fees
- Marketing and advertising

It'll be time-consuming, but you'll have to itemize all of your business expenses. Since most services bill monthly, that'll be the most convenient way for you to calculate, too. Once you've determined your monthly expenses, you know what you'll have to PAY each month. So if you don't want all that money to come out of your take-home salary, you'll need to bake it into your hourly rate.

Just calculate your monthly expenses, then divide that number by your monthly working hours. Add THAT number to your desired take-home rate (DTHR).

How to Do It:

Your desired take-home rate = \$25/hr

Your business expenses = \$900/month

$900 \div 160 \text{ (4 x 40 hr week)} = \$5.60 \text{ (your overhead cost per hour)}$

$\$25 \text{ (your desired take-home rate)} + \$5.60 \text{ (your hourly overhead rate)} = \31.60
(what you charge clients)

PRO TIP:

When calculating your rates, make sure to account for all of the nuances of your specific business. Would you prefer to work 20 hours a week instead of 40? Or bring home \$50/hr? Plug in the numbers that work for you.

“Entrepreneur Tax”

Being an entrepreneur means you get to be your own boss and have total control over your company and how it’s run. It can be an extremely liberating and fulfilling journey, but there are some regular employee benefits you’ll be missing out from.

As a staff employee, much of your basic financing is handled for you by your employer. Things like your taxes; health, vision, and dental insurance (and potentially that of your family); and retirement savings are all taken out of your check before you receive it. So when you deposit your check, what you see is what you get.

As a solo business owner, you need to account for all of that stuff out of pocket. On top of that, you no longer have a buffer for PTO, leave of absence, or even sick days. So during times that you don’t work—you don’t get paid. That’s why the entrepreneur tax is another vital fee to incorporate into your rates.

Plan on accounting for vacation time, unexpected sick days, or any other situation in which you might not be working but would still require income. And once you calculate how many days off you need to account for, add that onto your hourly rate, as well.



How to Do It:

DTHR = \$25/hr

Your desired PTO time = 1 month

$\$25 \times 160$ (4 x 40 hr week or 1 month) = \$4,000 (amount of money you need to cover 1 month off)

$\$4,000 \div 11$ (remaining months of the year) = \$363.60 (amount of extra money you need each month to make up for the month off)

$\$363.60 \div 160$ = \$2.30 (hourly PTO allowance rate)

DTHR = \$25/hr + \$5.60 (your hourly overhead rate) = \$31.60

$\$31.60 + \2.30 = \$33.90 (what you charge clients)

Now calculate your hourly insurance costs and add that number to your running hourly rate.

Insurance = \$500/month

$500 \div 160$ (4 x 40 hr week or 1 month) = \$3.13 (hourly insurance cost)

$\$33.90 + \3.13 = \$37.03

You'll also need to incorporate your retirement savings, child support, or any other fee that would traditionally be automatically taken from your gross total.

PRO TIP:

To determine your hourly costs per expense, first calculate each expense's monthly fee. Then divide that number by the number of hours you intend to work each month. Then add THAT final number to your working hourly rate.

Billable Hours

Often entrepreneurs don't realize this until they jump in full force, so we'll help you rip the bandage off now... You will DEFINITELY work more hours than you can bill for. In addition to the services and value you provide to clients, you'll also have to manage a lot of housekeeping work for your business, too.

If you want customers, you have to spend time looking for them, marketing to them, and communicating with them all before they even officially become your client. You'll also have to manage your daily and monthly business operations and administrative tasks. And if you do house calls, you may not bill for driving time, either.

So if you want to work no more than 40 hours per week, you may have to cut your client-facing time down by 10 or more hours. That means once again you need to make up that gap by baking those extra 10 hours into your working hourly rate.

Market & Economic Conditions

As a business professional, you're well aware that the economy fluctuates. When it's down, people have less money to spend on "luxury" expenses. And anything extra that isn't necessary for basic human needs to be met can be considered a luxury item. Sure, people need to stay healthy...but when push comes to shove, they could take a few laps around the neighborhood instead of going to the gym.

When establishing your prices, it's important to be mindful of the economic state of the area you're in and make a reasonable determination of what people can afford. Of course, this doesn't mean undercut your own prices. Just be mindful of the economy and pay attention to what your competitors are charging. If things start to get rough, consider temporarily lowering your prices. Having lower-paying clients is better than having none at all.

You can also raise your prices when the economy is good (although tread with caution because an unexpected and high price-hike can also have an adverse effect).

Your Clients' Demographics

Just like maintaining a good working knowledge of the current economy, you should also understand your clients' demographics—including their income. Are you targeting middle-class clients or the ultra-wealthy? How much money your clients have to spend is directly correlated to how much you can charge. People on a lower income will consider the value they're getting for the price, while wealthier people may be willing to pay more for a more "luxurious" experience.

The good news is that, to a point, you can determine who your demographic is—especially if you work virtually. If you're focusing on a particular locale, however, you should be mindful of the standard income rates of that area.

PRO TIP:

If you choose to work with high-ticket clients, it's important to provide a high-ticket experience. So make sure to be honest with yourself. It's ok to charge whatever fee you want, but the higher you go, the higher quality AND experience your clients will also expect. Everything you provide from your product to your customer service, and even your branding, should "feel" luxury.



Calculating Your Fee:

Step 1: Determine your DTHR.

Step 2: Calculate your overhead fees and add them to your DTHR.

Step 3: Calculate your taxes, insurance, and other fees that would typically be removed from your paycheck and add it to your DTHR.

Step 4: Determine how many of your working hours are billable and then bake in the remaining hours into your DTHR.

Step 5: Be mindful of the economy and your clients' demographics and make sure your rates align with those expectations.

How Pre-launch Tasks Prep You for Business

After running some basic themes through Namelix, you finally have the perfect business name that personifies your brand and what you do—and the best part is that your test groups love it!

Yes! Now that you've checked to make sure no other business has claimed it in any way, you file all your necessary paperwork and officially own your business name!

That's great news because now your insurance company has a name to send your check to if something should cause you to become temporarily out of work. And as an independent consultant, knowing you have that safety net gives you the confidence and freedom to continue pressing forward in your career when you're ready to jump back in.

When is that, exactly? Whenever you want! Because you designed your contract to have exactly the schedule and terms YOU need to make your business thrive. And you know you don't have to worry about stressful last-minute updates or changing deadlines because everything is already laid out.

So you work hard, provide your clients with the session of a lifetime, and collect the take-home income you've dreamed of making because you've accounted for those disappearing fees before you even get your check!



A photograph of a white modern-style chair with wooden legs. A laptop is resting on the seat of the chair. The background is a plain, light-colored wall.

Branding and Marketing

Technically, marketing and branding are pre-launch steps. But they're things you'll continue to do throughout the duration of your business. Marketing is important, and you could consider branding the "Packaging" of your marketing efforts. The "Gift," of course, is your business.

Marketing

The reason for marketing your business is obvious—to get clients, you first need them to **KNOW** about you. But the "How" to market is a little trickier than many new (and even established) entrepreneurs realize. It's an essential skill to master though. Because as an entrepreneur, your pay depends on being able to book clients, rather than a faceless CEO signing your checks. No clients = no pay.

When first starting out, the goal of your marketing strategy is to raise brand awareness (that is, let people know your business exists). You want to send people down a palatable and logical path that ultimately leads them to become satisfied

customers. It should look something like this:

Unaware of your business>Prospect>Lead>Intent to Purchase>Loyal Customer

Basically what that means is that you need to grab the attention of people who don't know about your business (which is everyone in the beginning) and get them interested enough in your product to learn more. Then once they're interested, entice them to buy, and finally land them as a client.

That's the basic structure of a sales funnel from start to finish, and we all go through them nearly every time we do business with a new brand (and sometimes even familiar ones) whether we realize it or not.

Marketing is a hefty task to take on, and it does require an actual strategy to work. It's something you can learn to manage, but it does mandate that you have a basic understanding of the "whats" and "whys" behind the mechanics so you can build an effective strategy. Too many times, small business owners abandon their marketing efforts because they think it's not working. In actuality, they're actively walking away from growing their businesses (and wallets!) and landing new clients.

If you're not up to taking on the task of marketing manager, you can outsource the work. Hiring an agency or freelance consultant are good options, especially if you're starting from the ground up. But you could also hire an in-house staff member to be responsible for your brand's strategy. Just make sure you hire someone qualified.

If you're ready to take on the title of CEO and CMO, though, keep these things in mind to get you on your way.

Marketing Strategy

We'll reiterate this point because it can't be driven home enough. A marketing strategy is imperative if you want your efforts to be effective. Every day, people are bombarded with ads on every medium they see. Print, video, radio, mobile, billboards...even down to the entertainment content we consume. There's no way people can pay attention to all of them, and our default is to ignore them—so you need to make your business cut through the noise and get your customers' attention.

That's why a shotgun approach to marketing doesn't work well. It's not enough to throw out random ads and post sporadically to your business social media page. If you're going to break through the clutter and get eyes on your brand, you need a strategy to do it. A clear path with defined [SMART goals](#) and a step-by-step plan of attack is essential to any meaningful strategy.

What your strategy looks like depends on a lot of variables. Things that might affect it and marketing decisions will include:

- Budget
- Demographic
- Branding
- Industry
- Goals



Budget

Posting to your business Facebook page is free, but getting it out into the world is another story. It goes without saying that TV, print, radio, and video ads have to be purchased. As a general rule, the more money you have for ad spend (the money you have allocated specifically to buy ads), the wider net you're able to cast.

You could spend anywhere from \$5 to \$5 million dollars a month on social media ads alone. As a small business owner, don't feel like you need to come up with hundreds of thousands to spend on your marketing. But do keep in mind that marketing and advertising are a pay-to-play game. Organic efforts will only get you so far before you have to start investing in your marketing campaigns if you want to keep getting the word out.

Here are a few things to keep in mind when figuring out your marketing budget:

- Ad spend
- Content creation
- Design

Demographic

Understanding your [target demographic](#) is essential to so many aspects of your business—including marketing. When you know **who** your customers are, you know **how** to communicate with them. The BEST way you can market to your potential customers is by using a medium they use, too. You wouldn't advertise a senior citizens retreat on Reddit. But air a commercial during grandma's daytime soaps and she's much more likely to see it there.

Do your marketing where your ideal customers spend their time and are, therefore, more likely to see your ads. Otherwise, you're in danger of wasting money on ads and collateral your potential customers will never see.

Knowing your demographic is also beneficial if you want to send out targeted ads on social media. If your demographic is new stay-at-home moms in their 30s with a total household income of \$100,000 and an interest in fitness—you can target them specifically! But you have to know all of those things first in order to do that.

Branding

Maintaining a brand consistently throughout every aspect of your business is important. So that includes your marketing—and especially when you’re first starting out. There’s an old marketing rule that suggests it takes people about [seven interactions](#) with a new brand before they recognize and feel comfortable shopping with them. You can see how if your branding isn’t consistent, it can disrupt your recognition.

Since your brand is also the “Personality” of your company, you should also consider it when developing your marketing strategy. If you have a young, hip vibe, a vibrant Instagram feed mixed with some trendy influencer marketing might be a good fit. If you take a more classic, traditional medicine approach, some slick imagery and infographics on Facebook might work best for you.

There’s no official map to how you should market based on your brand. It’s just something to keep in mind as you build out your holistic marketing approach.



Industry

It's also a good idea to stay up-to-date with industry trends for your field. What are other businesses in your industry doing? Is it working? If so, you should probably be doing that, too. Don't worry—it's not copying. Even huge conglomerates conduct market research that gives them valuable information they use to guide their business decisions. Don't go against the grain on purpose just to be different. Stay where your customers are.

So, if you're a fitness coach or dietitian, get on Instagram. It's booming for that kind of content. Do you offer personal training? Put some tutorials out on Youtube, sharing a few of your workouts and results. Opening a brick-and-mortar gym? Give out branded water bottles to the local community.

Think about the key features and benefits of your field and how it makes sense for your business to make a big splash in your industry pool. And don't be afraid to get creative!

Goals

Remember those SMART goals? It's essential for them to be clearly defined, otherwise you'll never really meet them.

Your marketing goals won't always be the same. In the beginning, your main focus should be on brand recognition and getting the attention of your potential customers. You might even offer discounts to get people in the door. Once you have a full pipeline though, and people are more familiar with your brand, your goals may switch to getting people to sign up to your waiting list. Different goals require different strategies to be met.

On top of that, it's important to understand what goals are reasonable. You're not going to get on Facebook and have 10K followers in one month (and even if you

did, it would do more harm than good). Instead, focusing on healthy engagement with a community full of leads is what's really going to pay off. But if you don't know what goals to aim for and how to measure them, you're constantly shooting in the dark. What's more, you have no way of telling if your marketing is working and you won't even know which area to fix.

Marketing Mediums

Now, you know you need a solid strategy to market your business, but where and how do you do it?

Traditional outbound marketing (cold calling, trade show booths, conferences, etc.) is still an option. It tends to be more costly and have a lower ROI than inbound marketing, but it's a good option for some industries. As a health and wellness entrepreneur, you'll get the most bang for your buck through inbound marketing (allowing yourself to be "found" by customers through content and social media). But even that isn't the only effective marketing tool.



Here's a list of today's modern marketing avenues:

- Social media
- Sales funnels
- Email marketing
- Collaborations
- Influencer marketing
- Website

Social Media

The big three platforms are Facebook, Instagram, and LinkedIn. But YouTube, Twitter, and Pinterest are close behind. And for younger audiences, platforms like WhatsApp and TickTock have become go-to marketing outlets, too.

You'll remember above, we went over the importance of understanding your demographic. One benefit of that is knowing which, if any, social media platforms your brand should be on. It's a common misconception that your business needs to have a presence on every social platform that exists. Not only is that not necessary, but you'll also end up wasting time and resources. A quick Google search with a few of your demographic's traits (age, income, gender) can tell you the best outlets to choose from.

Social media marketing plans require their own strategies. You'll need a unique one for each platform, as well as an overarching umbrella social strategy. But in general, keep these tips top of mind when developing your social media strategy.

Content Marketing

Distribute quality content in the form of blog posts, images, videos, infographics, white papers, ebooks, etc. The goal is to provide **free** value to your potential customers. Doing this helps establish you as a thought leader in your industry, proves to potential customers that you know what you're talking about, and gives them an opportunity to "Try before they buy." What's important is that you provide high-value content. Whatever you offer has to provide some type of (preferably actionable and educational) value. So be careful. Putting out low-quality content will actually paint your brand in a poor light and do more harm than good.

How to use it: Once you decide on the social media platforms you want to use, you need to create content that works for each specific platform. Facebook and Twitter are great for sharing blog posts and videos. Pictures and short videos are good options for Instagram. The goal is that when you put out content, if it's good, it will naturally encourage people to share it—thus spreading the word about your brand.



Some good examples of shareable content ideas:

- [Blog posts](#)
- [Videos](#)
- [Live streams](#)
- [Images](#)
- [Infographics](#)
- [Podcasts](#)
- [User-generated content](#)
- [Webinars](#)
- [Testimonials](#)
- [Ebooks and guides](#)



PRO TIP:

You're better off putting out **quality** content or none at all. As a health and fitness entrepreneur, although you're knowledgeable in your field, you may not have the skills necessary to professionally build out your content. Consider hiring staff or freelancers to help create written, video, and design-heavy content. One great how-to blog post a month is better than six poor ones. Always focus on quality over quantity.

PRO TIP:

Content marketing in the form of blogging is a two-for-one! Not only can you share the blog content on your social pages as part of that strategy, but a good [SEO](#)-rich blog also helps people organically find your website while they're searching the web on their own.

Scheduling

If you want an engaged audience on social media (and you do), then you have to engage with them, too. So keeping a consistent posting schedule is imperative. It lets users know you're active and that they should continue to pay attention to you, and it helps generate traffic back to your page.

It's easier said than done to keep track of, though. We recommend using a social media management platform like [Hootsuite](#) to manage all of your social accounts from one hub. You can schedule posts weeks out to make sure your social marketing is running like a well-oiled machine even if you don't remember (or have the time) to post every day.



Our Favorite Social Media Management Tools:

- [Hootsuite](#)
- [Buffer](#)
- [Sprout Social](#)
- [Taboola](#)

How to Use It: After creating an account on your social media management platform, you'll be able to link your social media accounts. From there, you can schedule out posts down to the day and time for each of your business's social media pages. You'll also be able to scroll your feeds and view comments from one place. It may take a couple of hours to schedule them all, but then your social media posts can be on auto-pilot for the month.

Timing

[The time of day you post matters](#) when it comes to your social media marketing strategy, too. While technically you can post at any time of day, different demographics tend to browse at different times. So to give your content the best chance at getting in front of the most eyes (especially as organic content reach continues to go down), posting when your audience is online is beneficial.

PRO TIP:

Having a good social media presence is great for connecting with your audience, and over 52 percent of brand discovery happens through social media. It doesn't end there, though. In addition to your social media marketing on its own, your channels are also a great resource for even MORE online marketing. More on that below.

Sales Funnels

Let's expand on those sales funnels we mentioned earlier (the one that leads people from clueless to customer) using the AIDA approach.



Awareness: Get the attention of potential customers. This is when you begin to familiarize people with your brand. At this stage, it's important to share branded content, let people know what you do, and spend a little time educating them on your business.

Interest: Once you've familiarized people with your brand, make them long for more. This is the time to start pumping out that valuable content. Teach people why they need your service and give them some advice they can act on and build trust with. If you're a nutritionist, release a few recipe infographics, food-prep guides, healthy snack blogs, etc.

Desire: If you successfully get people to trust your brand AND realize they need your product, they'll begin to think about purchasing. At this point, you want to switch your content from general advice and education to how your business specifically can give people what they want.

Action: If you've played your cards right, it's time to pitch to the (now warm) leads you've built up and transform them into customers. At this stage, it's still important to keep reinforcing your value and get them to buy while they're hot.

Let's talk about the steps to building a funnel:



Step 1: Initially you want to generate traffic to lead back to your funnel. This is basically the awareness stage. Just worry about putting out some awareness content and ads that lead back to your website or social media page.

Step 2: Bait them in with a lead magnet—something that's going to entice people to give you their email address so you can skip the middleman and market directly to their inbox! Your bait has to be something valuable and more in-depth than your awareness content. Still using the nutritionist example, instead of a regular blog post as a lead magnet, you might offer a high-quality deep-dive 90-day healthy eating schedule. And in order to get it, leads have to give you their email to receive it.

Step 3: At this point, you can begin advertising your main service and slowly ramping up to the big sale. You'll do this by combining email marketing and offering smaller upsells periodically.

Of course, these are just the basic steps. To pull off your own funnel, you'll need an in-depth understanding of how the whole process works and a step-by-step walkthrough. We love [ClickFunnels](#) for that.

Email Marketing

You're golden once you start building an email list because now you can send marketing collateral to your already warm leads whenever you want (and for free!). It's a good way to continue to market your products, tease out new launches, and build brand loyalty. Still, there are some [best practices](#) to use for your email marketing to be most effective.

Email marketing can also help with your customer engagement and retention by giving your list exclusive VIP offers, coupons, and opportunities.

Collaborations

[Partnering with other brands](#) can be beneficial to both of you by sharing your audiences with each other. You have to choose a brand that's similar enough to your industry but not a direct competitor. For example, a nutritionist might collaborate with a personal trainer but not another nutritionist. Otherwise, you'll be fighting for the same customers instead of sharing them.

Typically for a collaboration to work, both brands will need a good web presence. Additionally, a collaboration has to be mutually beneficial. So you have to be prepared with something you can offer your partner brand: a big audience to expose them to, a perk you're offering them, or even payment.

Influencer Marketing

Influencer marketing is cut from the same cloth as brand collaborations. Except instead of partnering with a brand, you'll be contracting out an influencer to market you to their existing audience. Although it's a relatively new term, brands have been using influencer marketing for years. Any time an athlete endorses a sports drink or some new gear, they're using their influence to market the brands that hired them. Online influencers are the celebrities of the digital age.

Sometimes, they'll reach out to you, but you can (and many businesses do) actively search out relevant influencers and pitch an offer to them. But keep in mind that when you're the one reaching out and asking for help, the influencer has the upper hand and not the other way around. Established influencers require anything from free samples of your product to hefty payments—and sometimes both!

Influencers are a great resource to use to fast-track your brand awareness and earn trust. But like everything else involved with marketing, you [need a solid strategy](#) to pull it off.

Website

We're full swing into the digital age, so it's important to have a presence where people can find you online. But just having a website isn't enough. It needs to serve a purpose and [give your customers the information they need to make an informed decision](#) about doing business with you. Plus, you'll need a website if you want to host a blog or build out sales funnels, too.

If you're technologically inclined, you can definitely build an entire website yourself. If that's not an option though (and it isn't for most people), you can hire an agency or freelancer to build a custom site for you. Be prepared to make a hefty investment for a properly functioning and good-looking site. Like your content, you don't want to skimp on your website. It's best to save up or budget for a well-done website than lead your customers to one of poor quality (or that doesn't have the information they want).

The third option is to design your website using an existing hosting platform like [WordPress](#). You may be surprised by how many big-name companies use it. That's because it's a good option to just plug into an existing template and go, but it's

also friendly to patches to code-manipulation so you can continue to build off its original framework and customize your site.



Our Favorite Website Building Platforms:

- [WordPress](#)
- [Squarespace](#)
- [Shopify](#)
- [Wix](#)



Branding

Your branding is the personality of your company. It should not only help indicate the general “attitude” of your company, but it should also work to remind people of you. When you see a swoosh, you know what company it represents. And no matter where you are in the world, if you see those golden arches, you know delicious, crispy, golden-brown nuggets aren’t too far off.

That’s the [benefit of good branding](#). It makes you instantly recognizable without having to lift a finger, and it’s [so valuable](#) to your business because:

- It builds trust.
- It supports advertising.
- It identifies and clarifies your business.
- It helps build emotions ([and emotions sell!](#)).

Brand Strategy

By now you know how important strategizing is and how easily your efforts can fall apart if you don’t. So, it’s no surprise that you need a strategy for building and establishing your brand, too. Everything from your logo to your company colors to the way you communicate to your customers and the world is derived from your brand identity.

These are the elements of any good brand identity and what you need to do to build yours:

- Discovering your value
- Personality and language
- Logo and design

Discovering your value

You're a health and wellness entrepreneur and you already know what your specialty is. But you're not the only person in the world—or even in your city—who offers your services. So, you need to figure out what your business offers clients that your competitors can't. What specific value would customers come to you for that others in your field can't provide?

Just [niching down](#) thoroughly could be enough to set you apart from the pack. But if there's still more competition than you're comfortable with offering the same service as you, it's time to get even more creative.

Audience

Who your demographic is determines how you'll communicate with them. You can't use the same language with grandma that you would use to communicate with teenagers. Knowing your audience lets you know exactly how to speak to them.

Mission & Vision

Surely you've seen companies list their mission and vision statements before. That's not just to impress their clients (although it doesn't hurt); it's also helping them establish their brand. Of course, in your head, you know what your business is all about. But really fine-tuning it and making it official gives you a reference point for current and future decisions. Let your [mission](#) and [vision](#) statements guide your company's goals. Besides, having clear statements like this also helps you build out that personality.

SWOT

Doing a [SWOT analysis](#) can be extremely helpful to aid you in determining your strengths, weaknesses, and characteristics you want to portray.

Personality & Language

Your brand isn't an actual person, so you can skip the whole bio and backstory. But that doesn't mean you shouldn't have any type of personality. It's ok to be super professional and serious or laid-back and casual. When you're comfortable with your value proposition, mission and vision, work off that to build your personality.

It's helpful to think of your brand as a person. How would it communicate to its peers? What kind of tone and energy does it give off? How do you want people to perceive you?

Logo and Design

Only once you're confident with your mission and personality should you begin establishing your logo and design assets. And that's because they need to also reflect your branding. In fact, every piece of communication or collateral your business puts out into the world needs to reflect your brand—otherwise, the whole thing falls apart. Remember, for your branding to be effective, it has to be cohesive. Your business needs to feel like one connected unit to ensure you're always recognizable.

Sure, you could pick any two colors you like. But if you want your company to give off luxury vibes, a hot pink and purple color palette doesn't exactly communicate that. And that cool, script font you like to use is pretty and elegant but too light to read well if your clients are elderly. And all of that matters as part of your overall brand experience.

Everything from your logo to your font...from your language to your website...from your infographics to your social media posts should give off the same cohesive esthetic. Always.

How to Do It: Building out a brand from scratch is a big and involved task. On your own, you can develop your [archetype](#), value prop, personality, tone, and language. But there are also [professionals you can hire](#) who specialize in that, too. And because of their experience, they'll be able to pitch you things and find angles you may not know about (or even know to look for). Design is a totally different ball game though, and you should definitely hire a professional if you don't specialize in it.



Our Favorite Resources to Assist with Brand Development:

- [Color Selection](#)
- [Font Selection](#)
- [Logo Design](#)

How Marketing and Branding Integrate into Your Business

Your name is set (and you own any trademarks or copyrights you need), your business is registered and protected, you've got your prices set—and you're all ready to open up shop and start making money doing what you love!

And you're already smiling from ear-to-ear because your business is generating a buzz before you've officially even launched! Thanks to your social media campaigns targeting the exact people looking for a business like yours, people have started to recognize your brand and take you seriously. Because your logo and messaging really resonate with your target demographic, they're actively taking steps to learn more about YOU.

And they totally can! With people actually requesting to hear from you, you have a chance to market directly TO them—with their permission! Just another opportunity to continue building up your customer base so you start out with a waiting pipeline from day one!



Tools to Ease Your Business Operations

It's important to get and maintain the training, education, and certifications you need to operate your health and wellness business (and to please your clients). But in order to make your investment and hard work pay off, you need to ensure your business profits. As a salaried employee, you're used to doing your job and collecting your check—the work is already waiting for you. But as an entrepreneur, not only do you have to provide your service, you also have to run a functioning business from top to bottom.

That's why understanding how to run, operate, and manage your business is equally as important as understanding your health and wellness specialty. The actual consulting is the end product you provide to your customers, but that alone isn't enough to keep your business running.

If your business was a film, consider the client-facing work you do—the stuff your clients see—as the finished production. But there are all those behind-the-scenes tasks that need to be done for the whole thing to work. That's your business operations. As an entrepreneur, you have to wear a lot of hats, and one of those is Business Manager.

There's no one-size-fits-all template to what your specific operation should look like and how you should run it, but in general, you should stay on top of these things to keep your business running like a well-oiled machine.

Customer Experience Tools

By the way, the critics of your production are your customers. They get the final say as to whether you succeed or not, so [your customers' experience needs to be a top priority](#) from the moment they first learn about you until the last time they ever hear from you. This is especially important in a service-based industry. So, you'll want to keep the entire process of working with you as customer-centric as possible.

While this list isn't exhaustive (think about your specific business and customer desires and what might work for you), here are a few things you can expect your customers to be looking for or extras that would improve their experience and keep them coming back to you.

- Scheduling
- Customer feedback
- Customer self-service

Scheduling

At some point, your customers are going to have to schedule some time with you. It could be to set up a one-on-one session for some general onboarding to your program or even to chat about a few quick questions that an email just won't cut it for. The "Why" doesn't matter, but it's the "When" you need to prepare for.

You want to make it as easy as possible for people to get in touch with you. That means both current AND potential clients. Wouldn't it be a shame to lose an

inquiring new client (and the money they're already trying to give you) because someone else picked up the phone when you didn't?

Scheduling tools like [Calendly](#) let you input your available time slots, and then allows your clients to browse your availability and pick a time that works for them—all at the push of a button. It's truly set-it-and-forget-it because Calendly will send out appointment confirmations, reminders, and even a link to reschedule.

Clients love it because it's easy and intuitive to use and lets them feel more in control of scheduling. You'll love it because it avoids repetitive back-and-forth emails and takes one more administrative task off your already busy plate.



Our Favorite Scheduling Tools:

- [Calendly](#)
- [HoneyBook](#)
- [VCita](#)

How to Use It: Like any new software or platform, you'll have to create an account, follow the prompts, and enter any relevant information. Once you're in your calendar, you can plug in all the times you're available for meetings/sessions/etc. Then just send your Calendly link to anyone who needs to set up a meeting with you—and that's it!

Just remember to keep your calendar updated regularly with your available schedule.

Customer Feedback

Opinions. We all have them, and with a world-wide megaphone to the internet in each of our pockets, we're all ready to share them at a second's notice. So when it comes to your business, you want any opinions shared to be nothing short of absolutely glowing. Unfortunately, no business is immune to the occasional critic.

Even if you're the most intuitive, motivational, passionate coach 99.9 percent of your clients have ever worked with, it's impossible to please 100 percent of the people 100 percent of the time. Eventually, someone's going to have some criticism. It just comes with the territory. The **worst** thing you can do in that case is ignore valid critiques, even if you don't think you've done anything wrong.

No one likes feeling like they've encountered bad customer service, and people [aren't afraid to tell their friends and family](#), either. But more than curbing a nasty social media campaign, letting clients provide feedback makes them feel heard and valued. And if you happen to actually implement a customer's suggestion, you'll score some major loyalty points from that client, and that kind of stellar customer service breeds referrals.

Platforms like [HubSpot](#) have customer experience features that can record customer inquiries and [NPS](#) (customer loyalty). But you could just as easily send out regular email or social media surveys. Just make sure your clients have a way (and access to it) to communicate any feedback they want. And then make sure they know that you're taking it into account (even if you don't end up implementing it).





Our Favorite Customer Feedback Tools:

- [HubSpot](#)
- [Podiu](#)
- [Sametrix](#)

How to Use It: If you're using a customer experience software, naturally you'll have to make an account and follow prompts to integrate it with any necessary existing tools (your website, email, social media, etc.) Once it has all of your customer communication channels aggregated in one spot, your platform can track your customer complaints and support tickets. You can even create reports to give you a clear analysis of what your customers love, where there's room for improvement, and to help you stay on top of recurring issues. Then it's up to you to put that information into the practice your clients want to see.

Customer Self-Service

The internet makes it easier than ever for people to find the information they want online. And as a matter of fact, people increasingly (especially the millennial generation and younger) prefer to research and find the information they want at their own pace. It eliminates the inconvenience of having to wait to speak to someone, especially about a problem they might be able to fix instantly if they have the information to do so. A good self-service portal also means your time isn't tied up answering the same questions over and over when you could be spending it more productively.

The easiest way to help your customers with self-service is to set up a FAQ page—and it's easy to do! Write down the most common questions you get about your business and then provide thorough (and actionable if it calls for it) solutions your

customers can walk away with. This section needs to be included on your website, so be sure to make a page or have your webmaster build one especially for your FAQ.

Of course, if you want to use something a bit higher tech and with a more customizable user experience, you can use a software like Team Support that integrates right into your website and existing branding. In fact, with [Team Support](#) you can build out an entire wiki, how-to resource guides, and more.



Our Favorite Self-Service Tools:

- [Team Support](#)
- [Help Shift](#)
- [Wix Answers](#)
- [WalkMe](#)

How to Use It: The main itch you're trying to scratch with customer self-service is offering your clients solutions to their problems so that you can focus on running your business. Whether you build an FAQ page or integrate software, the main goal is helping them help themselves. The real work here is just figuring out what questions or problems might pop up for your clients and then providing them step-by-step solutions that work.

Accounting Tools Perfect for Small Businesses

Wellness and math go together like peanut butter and salsa. You wouldn't organically put them together, and there's nothing about them that even remotely overlaps. But when you're running a business and money is exchanging hands, managing your accounting is a necessary (and legal!) chore.

The good news is you don't have to be hunched over a calculator, eyes glazed over, to get it done. You don't even have to be parked at a desk, straining your eyes to manage a spreadsheet. Software like [PayPal](#) easily lets you invoice your clients and receive payments that you can transfer to your bank account. And when tax season comes, you can pull up your entire transaction history with all of your clients—all just a few clicks away.

PayPal even lets you set up automatically recurring payments for retainer clients. If you need something more robust though, there's plenty of accounting platforms that'll fit your business needs. Some have features like syncing your invoices into your working tax documents, maintaining ledgers, capturing signatures, and even allowing you to accept cryptocurrency. A few even have project management features like time tracking and reminders.



Our Favorite Small Business Accounting Tools:

- [PayPal](#)
- [Bill.com](#)
- [Harvest](#)
- [FreshBooks](#)

How to Use It: After the initial account setup, you can create plug-and-play invoices to send your clients by filling out the pre-built templates with your billing information. Give the software your client's email address, and they'll get your invoice sent directly to their inbox. It's just as easy for them to pay as it is for you to send—all at the click of a button!

PRO TIP:

Keep in mind that some accounting software charges a fee per transaction. Make sure to thoroughly research which platform is right for you.

Tools to Stay Organized and Manage Clients

Your business is growing like crazy, you've got more clients than you know what to do with, and frankly, it's becoming difficult to keep track of everyone. You're charging Client X one fee but Client Y was grandfathered in on a different rate, you offer three different packages with a handful of clients in each, some contacts are new prospects while others are former (but hopefully recurring) clients...and the whole thing is getting a bit...messy.

Even if you are the most organized person, you can get lost trying to manage your clients' range of needs on top of everything else you're juggling to manage your business. And little slipups here can lead to bigger problems down the road. Fortunately, that's where Client Relationship Management (CRM) software comes in.

[Salesforce](#) collects client contact info and data, stores personal details (like whether they prefer contact by email or phone), and identifies and categorizes

leads—all in neat, little packages. Particularly as a health and wellness entrepreneur, it can even be an asset in helping you create customized programs for each client since you’ve got all their details right in front of you!



Our Favorite CRMs:

- [Salesforce](#)
- [Agile](#)
- [Monday](#)

How to Use It: Again, you’ll set up an account and integrate it with any other software you’re running. Then you can use it to create personal bios of your clients, organize them into categories, and even keep track of how frequently you communicate with them. But there are so many more useful features a CRM has to offer, you’d be better off exploring it yourself!

Multipurpose Tools

Having to sign up for, learn, and implement multiple new tools and platforms can feel overwhelming, especially when you’re new to running a business. Operations management isn’t most people’s cup of tea, so it’s understandable if even managing a team of management software sounds a little intimidating. While all of these platforms are leaders in the pack for a reason, sometimes there’s no denying that it’s just easier to dip your toes rather than dive-in headfirst and hope for the best.

In that case, while you shouldn’t avoid these things altogether, you CAN consolidate as much as possible. There are a few multiuse platforms designed specifically for health and wellness entrepreneurs that integrate several of your operations tasks in a single platform.



Our Favorite Health and Wellness Management Tools:

- [ZenPlanner](#)
- [Virtuagym](#)
- [MINDBODY](#)
- [RHINOFIT](#)
- [Push Press](#)

How Operations Tools Integrate into Your Business

You wake up to check your Salesforce info and see that a few new leads have filtered in, and it looks like they'd be interested in learning more about your business. So you type up a quick welcome email and include a Calendly link so they can book a meeting with you at their convenience. You immediately get a pingback—your prospect has booked a slot, and you avoided an unnecessary email relay!

Uh-oh... when you check your calendar though, you realize you forgot yesterday was invoice day! Fortunately, you had PayPal set up on auto, and your clients have already gotten their invoices on time. Which is great because your clients love getting their invoices at the same time every month, and you know that from going through your customer feedback in HubSpot.

You don't have to worry about too many complaints in there, though because if a client does have a question, it's probably already answered in your FAQ section, or they can find it on your site with Team Support.

And with so much management support working for you in the background, more of your day is freed up to run classes, build programs, coach clients...and totally OWN this entrepreneur thing!



We're Here to Help

Thank you for downloading our Health and Wellness Entrepreneur Toolkit! We hope it's able to help ease your journey through your wellness consulting business from start to finish.

AFPA has been in the business of providing exceptional education to over 110,000 health and fitness professionals spanning 124 countries for 25 years! We've set the bar for fully accredited AND affordable certification programs students can take at their own pace to help them become leaders in the health, nutrition, and fitness industry.

Regardless of where you are in your journey, we hope you'll consider AFPA a loyal resource to keep you up-to-date and certified (through one of our 27 courses and counting!) in your health and fitness career.

Don't hesitate to [explore more of our resources](#), or [reach out](#) to our team of industry-leading experts and education specialists with any questions.



Health & Wellness Professional Business Toolkit

American Fitness Professionals & Associates

800.494.7782 | www.afpafitness.com