

# Table of Contents

<b>Preface</b>	<b>iii</b>		
Introduction	iii	Work Smarter—Not Harder	41
About the Author	iv	Managing Business Logistics	41
Acknowledgments	iv	Working with Clients	41
How to Use this Book	v	Professional Development	42
Online Workbook	v	Idea Development	42
Digital Edition	v	Marketing	42
Special Note for Students	v	Having Fun	42
Teacher Resources	v	Personal Wellness	42
Pictograph Glossary	vi	High Priority Activities	43
What's In a Name?	vi	Tracking	43
<b>§1 Set a Strong Foundation</b>	<b>1</b>	Tracking Key Business Indicators	44
<b>1. Getting Started</b>	<b>3</b>	Tracking Trends	45
Self-Awareness is Key	4	The Art of Risk-Taking	47
Values Clarification	7	Motivation	49
Your Ideal Future	8	Motivation Techniques	50
<b>2. Life Planning</b>	<b>11</b>	<b>4. Boost Career Longevity</b>	<b>53</b>
Goal Setting	12	Career Longevity Components	54
Setting Realistic Goals	12	Personality Characteristics	54
Purpose, Priorities, and Goals	13	Client Interactions	54
Purpose	13	Technical Capabilities	55
Priorities	14	Business Savvy	55
Goals	14	Strong Client Base	55
Goal Setting Techniques	14	Prevent Burnout	56
Written Goals	15	Self-Care and Stress Management	56
Goal Setting Enhancements	17	Body Mechanics	57
Make A Collage	17	Scarcity Consciousness	57
Compile a Picture Book	17	Sloppy Time Management	58
Create a Picture Board	17	Poor Boundaries	58
Assemble a Vision Box	18	Boredom Syndrome	58
Record Your Goals	18	Professional Development	59
Build a Miniature Replica	18	Continuing Education	59
Clarify Your Life Vision	18	Requirements	59
Ranking Goals	20	Sources	60
Strategic Planning	20	Learning Environments	60
Follow-Through	23	Evaluating Continuing Education Providers	61
<b>3. Success Strategies</b>	<b>25</b>	Research	62
What Is Success?	26	The Scientific Method	62
Does Success Lead to Happiness?	26	Research Literacy	63
Self-Management	27	Research Capacity	63
Barriers to Success	28	Cultivate Your Support System	64
Attitudes, Beliefs, and Perceptions	28	Create a Safe Harbor with Supervision	64
How to Avoid Self-Sabotage	29	Professional Supervision	64
The Inner Critic	29	How To Find A Supervisor	65
Negative Conditioning	29	Start a Peer Support Group	65
Procrastination	31	Find the Right Mentor	65
Tools for Actualizing Goals	33	How to Choose Advisors	66
Creative Visualization	33	Mastermind Groups	67
Acting As If	34	How They Work	67
Affirmations	34	Join Online Discussion Forums	67
Breaking Old Habits	36	<b>§2 Intentional Excellence</b>	<b>69</b>
More Than Positive Thinking	37	<b>5. Conscious Practice</b>	<b>71</b>
Dissolving Problems	37	Ethics	72
Time Management Principles	38	Key Interpersonal Ethics Concerns	73
The Pareto Principle	39	Key Business Ethics Concerns	74
Types of Time Needed to Run a Business	40	Resolving Ethical Dilemmas	75
		Codes of Ethics	78

Professionalism	80	Employment Status	122
Professional Affiliations	80	Independent Contractor Status	122
Professional Credentials	81	Self-Employment	123
Image	81	Autonomy	124
Exude Confidence, Competence, and Compassion	82	Safety	125
Generate a Comfortable, Professional Ambiance	82	Planning	125
Treat Clients with Respect	82	Finances	125
Goodwill	84	Insurance	125
Public Recognition	84	Benefits	125
Social Responsibility	85	Self-Evaluation	127
Profiles	86	Your Ideal Career	128
Steps You Can Take Now	86		
Act Responsibly	86		
Volunteer	87		
Fund Projects	87		
Use Your Purchasing Power	88		
Be Respectful	88		
<b>6. Therapeutic Communications</b>	<b>89</b>	<b>8. An Insider's Look at Spa and Salon Settings</b>	<b>129</b>
Communication Fundamentals	90	What to Expect	130
First Impressions	90	Key Aspects of Spa Settings	132
Building Rapport	91	Corporate Culture	132
It All Begins with You	91	Training	132
Keys to Excellent Communication	91	Scheduling	132
Listening Skills	92	Treatment Space	133
Active Listening	92	Expanded Responsibilities	133
Reflective Feedback	93	Confidentiality	133
Body Language	94	Contraindications	133
Communication Barriers	95	Scope of Practice	134
Upset Clients and Difficult Situations	95	Seniority	134
Emotional Triggers	96	Boundaries	134
Documenting Client Sessions	97	Day Spas and Salons	135
Client Forms	98	Cruise Ship Spas	136
Intake Forms	99	Destination, Resort, and Luxury Hotel Spas	138
Session Forms	99	Resort and Luxury Hotel Spas	138
Client Interviews	100	Destination Spas	138
Timing	101	Medical and Dental Spas	139
Artful Phrasing	102		
Interview Stages	103	<b>9. An Insider's Look at Primary Healthcare Settings</b>	<b>141</b>
Initiation Stage	104	What to Expect	142
Exploration Stage	104	Key Aspects of Primary Healthcare Settings	142
Planning Stage	104	Administration	142
Closure Stage	105	Additional Training	143
Client Compliance	105	Care Coordination and Case Management	143
Client Education	106	Research Opportunities	143
Hone Your Interviewing Skills	106	Hospitals and Hospice	144
The Client Technology Connection	107	Medical Clinics	145
Machines vs. Humans	107		
Phone Etiquette	107	<b>10. An Insider's Look at Group Practice Settings</b>	<b>147</b>
Email and Text Etiquette	109	What to Expect	148
Screening Clients	109	Key Aspects of Group Practice Settings	149
Inappropriate Calls	110	Self-Assessment	149
Declining and Dismissing Clients	111	Interviews	150
Declining a Potential New Client	111	Common Values	150
Dismissing a Current Client	111	Roles, Goals, and Expectations	150
		Peer Support	151
		Legal Status	151
		Finances	151
		Product Sales	151
		Marketing	152
		Office Logistics	152
		Scheduling Clients	152
		Wellness Centers	153
		Specialty Centers	154
<b>§3 Exploring Career Paths</b>	<b>113</b>	<b>11. An Insider's Look at Private Practice Settings</b>	<b>155</b>
<b>7. Career Tracks</b>	<b>115</b>	What to Expect	156
Wellness Career Trends	116	Commercial Office Space	157
Why Career Focus Is Essential	117	Home Office	157
Multi-Discipline Options	118	Primary Care Provider's Office	158
Employee vs. Independent Contractor vs. Self-Employed	119	Fitness Centers and Health Clubs	159
Employment	119		
Corporate Culture and Image	120		
Policies and Procedures	121		
Compensation	121		
Sexual Misconduct	121		
Teamwork	122		

Practitioner for a Celebrity or Athlete	160	Conduct a Preliminary Evaluation	214
Corporate Wellness Programs	161	Analyze Documentation	214
On-Site and Outcall Settings	162	Assess the Business Premises	214
<b>§4 Navigate Your Way to the Perfect Job</b>	<b>163</b>	Open Negotiations	215
<b>12. Employment Fundamentals</b>	<b>165</b>	Brokers	215
Career Success Secrets	166	Final Stages	215
Traits of Successful Employees	166	Purchasing a Franchise	215
Research Potential Employers	167	<b>16. Location, Location, Location</b>	<b>217</b>
Informational Interviews	167	Zoning Regulations	218
Contact Potential Employers	169	Home Office Requirements	219
Polish Your Interviewing Skills	169	Variances	220
Tough Questions	170	Leasing Agreements	220
Take Charge of the Interview	172	Negotiate a Fair Lease	221
<b>13. The Employment Kit</b>	<b>173</b>	Office Design	221
Write an Inspiring Résumé	174	Ambiance	223
Résumé Formats	175	Professionalism	223
Cover Letters	180	Sensations	224
Targeted Inquiry Letters	182	Touch	224
<b>14. Terms of Employment</b>	<b>183</b>	Sight	224
Negotiating Initial Terms	184	Smell	224
Renegotiating Terms	184	Sound	224
Scheduling	184	Layout	225
Asking for a Raise	186	My Ideal Session Room	225
How Much Do I Request?	186	Relocating Your Practice	226
Advancement	187	Moving Within the Same City	226
Rate Your Performance	187	Retain Clients By Communicating Benefits	226
Review Your Performance Record	188	Revitalize Your Practice	227
The Performance Review Meeting	188	Notification	227
Mental Preparation	189	Generating New Clientele	228
Factor in Benefits	189	Moving to a New City	229
The Negotiation Presentation	189	Research	229
<b>§5 Business Fundamentals</b>	<b>191</b>	Network	230
<b>15. Business Start-Up</b>	<b>193</b>	Scouting Expedition	230
Initial Research	194	<b>17. Create a Dynamic Business Plan</b>	<b>231</b>
Scope Out the Competition	194	Business Plan Fundamentals	232
Meet People with Insider Information	195	Getting Started	233
Determine the Business Feasibility	195	Business Plan Outline	234
Supply and Demand	195	The Basic Business Plan	234
Complete a Self-Assessment	197	Cover Page	234
Assemble Your Business Advisors	198	Table Of Contents	234
Start-Up Financing	198	Owner's Statement	234
Legal Entity Status	200	Executive Summary	234
Sole Proprietorship	200	Mission Statement	235
Partnerships	200	Purpose, Priorities, and Goals	235
Corporations	201	Business Description	235
C Corporations	202	Marketing Plan	235
S Corporations	202	Risk Assessment	236
Personal Service Corporations (PSC)	202	Financial Analysis	236
Limited Liability Companies (LLCs)	204	Operations	237
Professional Limited Liability Companies (PLLC)	204	Success Strategies	237
Business Name	204	Appendix	237
Domain Name	205	Business Plan Supplement	238
Laws and Regulations	205	The Executive Summary	238
Professional Licenses and Requirements	206	The Financial Analysis	238
Business Licenses and Permits	206	References	238
Insurance Coverage	207	<b>§6 Business Operations</b>	<b>239</b>
Setting Your Fees	208	<b>18. Office Management</b>	<b>241</b>
Sliding Fee Scales	210	Policies and Procedures	242
Prepaid Package Plans	210	Policy Manual	242
Raising Your Rates	210	Internal Company Policies	242
Value-Added Service	211	Client Interaction Policies	244
Buying a Practice	212	Procedure Manual	249
Evaluate Your Reasons For Buying	213	General Procedures	249
Determine the Fit	213	Front Desk Operations	252
		Personnel	252
		Smart Technology Choices	253

Telephones	253	Gratuities	285
Messaging Systems	253	Business Deductions	285
Computers and Tablets	254	Business Use of Home	286
Laptop Computers	254	Travel, Entertainment, and Gifts	286
Tablets	255	Transportation	286
Business Software	255	Depreciation	287
Cloud Technologies and Apps	256	Assets Owned Prior to Business Establishment	287
Accessing Information	256	<i>Pro Bono</i> Work	287
Recordkeeping and Financial Analysis	256	Financial Statements	290
Calendars, Tasks, Reminders	256	Taxes	294
Client Management	256	Preparing Income Tax Returns	294
Marketing Strategies	256	How to Find the Right Accountant	295
Desktop Publishing	257	U.S. Federal Tax Reporting	295
Online Scheduling	257	Employees	295
Internet Service	257	Sole Proprietors	296
Copiers, Printers, and Fax Machines	258	Partnerships	297
All-in-One	258	Corporations	297
Office Organization	258	Employer's Forms	297
The Paperless Office	258	Tax Credits	297
Get Organized Now!	259	Business Tax Credits	297
Mail	259	Personal Tax Credits	298
Phone Calls and Messages	259	U.S. State Tax Reporting	298
Projects	259	Sales Tax	298
Upcoming Events	260	Canadian Tax Resources	299
Contacts	260	Provincial and Territorial Tax Rates	300
Client Files	260	Goods and Services Tax (GST)	300
Financial Management	261	Provincial Sales Tax (PST)	300
Resources	261	Harmonized Sales Tax (HST)	300
Protecting Your Records	262	Work Smarter with Barter	300
<b>19. Practice Management</b>	<b>263</b>	Direct Barter	301
Health Insurance Portability and Accountability Act	264	Barter Exchanges	302
The Four Facets of HIPAA	264	Retirement Planning	302
Who Must Comply with HIPAA Regulations?	264	Retirement Plan Options	302
Myths	265	Small Business Retirement Plans	303
Steps to Implement Now	265	SIMPLE IRA Accounts	303
Insurance Reimbursement	267	Self-Employed 401(k) Plans	303
Insurance Claim Processing Overview	268	Traditional IRA	303
Workers' Compensation	268	Roth IRA	303
Personal Injury Claims	268	SEP-IRAs	303
Third-Party Insurance Claims	268	Recession-Proof Your Practice	304
To Bill or Not to Bill	269	<b>21. Retail Management</b>	<b>305</b>
Types of Insurance Providers	270	Boost Your Bottom Line While Serving Clients	306
Managed Care Organization (MCO)	270	Extend Session Benefits	306
Health Maintenance Organization (HMO)	271	The Importance of Retailing	307
Preferred Provider Organization (PPO)	271	Retail Reality	307
Licensing Regulations	271	Ethical Concerns	308
Procedure and Modality Codes	271	The Power Differential	309
Diagnostic Codes	272	Product Knowledge	309
Basic Steps for Submitting Claims	272	Nutritional Supplements	310
Ensure Efficient Claim Processing	272	Choose Appropriate Products	311
Electronic Billing	273	Product Research	312
The Affordable Care Act	273	Distributors	312
The Anatomy of a Contract	274	A Twist on Traditional Sales	313
What to Include	274	Pricing Products	313
Negotiations	276	Inventory Control	313
Conflict Management	277	The Art of Selling Products	314
Mediation and Arbitration	278	The Three C's of Effective Sales	314
<b>20. Financial Management</b>	<b>279</b>	Consultation	315
Personal Budgeting	280	Convenience	315
Saving Money	281	Compliance	315
Credit Scores	282	Sales Methods	315
Financial Recordkeeping	282	Recommending	315
What Types of Records Should I Keep?	283	Baking	316
Create a Separate Identity	284	Direct Selling	317
Business Income	284	Creative Ideas for Selling Products	317
Credit Cards	284	Spotlight Products	317
Managing Gift Certificate Finances	285	Bundle Products	317

Public Speaking	318	Same Service—Different Target Market	371
Closing the Sale	318	Different Service—Same Target Market	371
Fostering Ongoing Sales	318	Same Service—Same Target Market	372
Merchandising	318	Marketing Mix	373
Visibility	318	Promotion	373
Design	319	Publicity	373
Drive Your BUS to Success	320	Advertising	373
<b>22. People Management</b>	<b>321</b>	Community Relations	373
What Makes a Good Employer?	322	Develop An Innovative Marketing Plan	374
Hiring Help	322	Marketing Plan Components	375
Administrative Support Staff	323	Marketing Assessment	376
Sources for Finding Help	324	Strategic Action Plans	376
Employment Regulations	324	Getting Your First Clients	377
Independent Contractor Status	325	Almost No-Cost Start-up	378
Common Law Rules	326	Moving Forward	378
Other Government Agency Guidelines	327	<b>25. Promotions and Community Relations</b>	<b>379</b>
Interviewing Practitioners	327	Word-Of-Mouth Marketing	380
Managing Your Staff	332	Natural vs. Planned WOM	380
Employment Policies	332	The Direct Referral Process	381
Performance Reviews	333	Request The Referral	381
Cultivate Camaraderie	333	Repeat the Request	381
<b>23. Transitioning Your Business</b>	<b>335</b>	Reward the Referral	382
Choose Your Direction	336	Reciprocate the Referral	382
Decision-Making Pinnacles	337	Generate Indirect Referrals	382
Exploration and Evaluation	337	Networking	383
Options	338	Work Your Network	383
Selling a Practice	338	Choose a Networking Group	383
Four Ways to Leave Your Business	339	Develop a Dynamic Introduction	386
Transfer Ownership to a Family Member	339	Self-Introduction Design	386
Sell to a Co-Worker, Key Employee, or All Employees	339	Build Professional Alliances	388
Sell to a Third Party	339	Increase Public Awareness	388
Liquidation	339	Develop Direct Affiliations	388
The Eight Selling Stages	339	Initiate Contact	389
Review Your Selling Motives and Alternatives	340	Front-Door Approach	389
Analyze Your Business	340	Side-Door Approach	390
Assemble Your Advisory Team	341	Back-Door Approach	390
Set a Selling Price	341	Forge Relationships	391
Preparing Your Business For Sale	343	Maintain Connections	391
Marketing	344	Public Speaking	394
The Actual Sale	344	The Public Speaking Circuit	395
The Post-Sale	345	Successful Presentations	396
Closing a Practice	345	Sample Topics	396
<b>§7 Marketing Mastery</b>	<b>347</b>	Resources	396
<b>24. Marketing Fundamentals</b>	<b>349</b>	Presentation Design	396
Primary Marketing Principles	350	Delivery	397
The Essence of Marketing	350	Overcome Nervousness	397
Benefits vs. Features	351	Events	398
No One Cares about Your Boat	351	Open Houses	399
What Clients Want	353	Pre-Planning	399
The Purchasing Cycle	354	Promotion	399
The Lifetime Value of a Client	356	Event Logistics	400
The Power of Public Opinion	356	Follow-Up	400
Establish Credibility	356	Booths	400
Positioning	357	Fundraisers	401
Branding Your Image	357	Client-Hosted Parties	402
The Differential Advantage	358	Sponsorship	402
Your Position Statement	359	Party Preparations	402
Target Markets	360	Product Sales	404
Demographics and Psychographics	361	Party Follow-Up	404
Connecting with the Right Clients	361	<b>26. Marketing Materials</b>	<b>405</b>
Matching Needs and Benefits	362	Design Overview	407
Target Market Profiles	363	Artwork Sources	407
Sample Target Market Profiles	364	Business Cards	407
Competition	368	Brochures	408
Competition Survey	369	Flyers and Circulars	412
Cooperation	370	Articles	413
		The Article Writing Process	413

Reports	414	Identify Your Hook	459
Newsletters	414	How to Contact the Media	460
Ready-Made Newsletters	415	Telephone	460
Newsletter Content	415	Email	461
Cooperative Newsletters	416	Mail	461
Newsletter Design	417	Faxes	462
e-Newsletter Tips	418	In Person	462
Welcome To My Office Kit	419	Press Releases	462
Direct Mail Materials	419	Press Release Components	463
Wellness Surveys	420	The Media Kit	464
Postcards	420	Pitch Letters	464
Greeting Cards	420	Fact Sheets	464
Sales Letters	420	Biographies	464
Envelopes	422	Photographs	466
Mailing Lists	423	Event Stat Sheets	466
Generating Responses	423	Getting Interviewed	466
Gift Certificates	423	Print Coverage	467
Expiration Date Debate	424	Airtime	467
Early Redemption	425	Programs to Target	468
Stocking Up	425	Planning Your Publicity Campaign	468
Marketing Gift Certificates	426	Post Coverage Follow-Up	469
Custom Gift Cards	427	Acknowledgments	469
Coupons	427	Print Media Contacts	469
Personalized Gift Items	427	Airtime Media Contacts	469
Signage	428	Evaluations	470
<b>27. Online Presence</b>	<b>429</b>	Capitalize on Coverage	470
Website Savvy	430	<b>30. Client Retention</b>	<b>471</b>
Planning	431	Beyond Customer Service	472
On-Page SEO	432	Customer Service Levels	473
Hosting Services	434	Minimal Customer Service	473
Content	434	Good Customer Service	473
Creative Design	434	Exceptional Customer Service	474
Marketing Perspective	436	Customer Service Action Plans	476
Drive Traffic to Your Website	436	Client Comment Cards	476
Search Engine Directories	437	Prevent No-Shows	477
Blogs	437	Incentive Programs	478
Videos	438	Membership Programs	479
Social Media Marketing	438	Rebook Clients	479
Social Media as SEO	439	Session Completion Protocol	479
Hashtags	440	Post Session Follow-Up	480
Posting Schedule	440	Transition Practicum Clients	480
Social Media Management Tools	441	Recapture Lost Clientele	481
Increase Engagement	441	Why Practitioners Lose Clients	481
Social Influencers	442	The Results from Your Work	481
Reusing Content	442	Professionalism	481
Multiple Social Sites	443	Convenience and Comfort	482
Personal vs. Business Use	443	Finances	482
Online Advertising	444	Psychological Needs	482
Customer Personas	444	Tools to Determine Why Clients Leave	482
Elements of an Online Ad	445	Survey Clients	483
Testing Ad Effectiveness	446	Reconnect	483
<b>28. Print and Broadcast Advertising</b>	<b>447</b>	<b>31. Marketing in Action</b>	<b>485</b>
Print Advertising	448	Marketing Ideas from A to Z	487
Display Ads	448	<b>Epilogue</b>	<b>491</b>
Content	449	<b>Glossary</b>	<b>495</b>
Design	449	<b>Endnotes</b>	<b>503</b>
Classified Ads	453	<b>Index</b>	<b>509</b>
Directories	455	<b>Other Offerings</b>	<b>515</b>
Broadcast Advertising	455		
Radio	455		
Television	456		
<b>29. Publicity</b>	<b>457</b>		
Developing Media Relationships	458		
Make a Personal Connection	458		
Become the Expert	459		
Be Newsworthy	459		