



Your Client Flow

HOW I WORK

PHONE VS. LIVE SESSIONS

SCHEDULING CLIENTS

COMMUNICATING AND INTERACTING
WITH CLIENTS

HOW TO CREATE A SAFE SPACE

INTAKE FORMS

CLIENT CONTRACTS, AGREEMENTS AND
CANCELLATION POLICY



- I offer a Free XX minute call to explore if we are a good match
- We can work via phone sessions or in person
- Our 1st session includes an extensive intake
- You'll receive personalized assignments and recommendations
- I'll offer easy-to-practice Mind Body Nutrition strategies
- This isn't a "one size fits all" approach – our work is personalized for you
- This is not therapy
- Health insurance is not accepted – cash, check or charge is
- One-time sessions generally don't work. This is a more comprehensive approach
- I'll do my absolute best to help you get where you want to go

NOTES:

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Phone Sessions vs. Live Sessions

As a practitioner, there are a few options available to you when it comes to seeing clients. They are: live clients that you meet in person at an office, or phone clients that you do work with long-distance. Naturally, you can work with people in person as well as over the phone, as they are not mutually exclusive. Fill in the pros and cons of each here below.

PHONE SESSIONS

The positives:

The negatives:

LIVE SESSIONS

The positives:

The negatives:

For phone sessions, the practitioner must always be 100% responsible for the sound quality and overall technical health of the call. Make sure you are in an area with good phone reception. Make sure your space is quiet. Do NOT multi-task while speaking to your client. Do not answer emails. If you use a head-set, ask your client “Can you hear me okay?” You also need to be able to hear your client. When either or both parties use a speaker-phone or a head-set, problems tend to be predictable. Refrain from using either. Make sure your phone is well charged. Put your phone on “Do not disturb”. Do NOT take another call while you are speaking with a client. Do NOT answer the door, play with your dog – in other words, pretend your phone client is right there in your office.



As part of doing sessions over the phone you can also use Skype or Zoom. Skype has the dual functionality of being able to use a regular phone – but you are using your computer to call – as well as making video calls. Skype gives you the option to either call “Skype to Skype”, which is free, or you can purchase Skype credits and call Skype to phone. If you are using it without the video, there will be the same pros and cons as using a phone with the addition on the negative side of a call being dropped because of Internet connectivity issues.

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Communicating & Interacting with Clients

How you interact with your clients is the key to your success as a practitioner. The “little things” are often the big things when it comes to your effectiveness and to building your practice and your reputation as a professional. You have one time only to make a first impression, and such an impression will last in people’s minds. So, it’s important to be attentive to the small details that make a big impression on your clients, and your potential clients. Consider this list of some key “do’s” and “don’ts”:

- Have “manners” - Be professional
- No perfumes or strong scents
- Be aware of the smell of your breath – keep mints or mouthwash on hand
- Clean fingers and nails
- Dress professionally - Be yourself but considerate of the professional setting
- Ask people what they want you to call them
- Be reliable - Be on time
- Respond to all client emails and phone calls in a timely fashion (24 – 48 hours)
- Maintain strict confidentiality
- Make eye contact
- Keep your sense of humor light and “appropriate”
- When in doubt, slow down your speaking speed with clients
- Be focused on your client, be present, embody presence
- Be direct if you have a request or a question – as opposed to being vague
- Maintain good posture when sitting or standing
- Watch your body language – let it be positive and empowered
- Be humble and respectful
- Clean up your language – don’t say “like” and “you know” too often (“Well, like, I’m so glad you’re my client, you know, I love doing this work, it’s like the best job ever, you know, like it’s so perfect...”)
- Don’t touch people without permission (aside from shaking a hand)
- Be aware that hugging someone can be very confronting and unexpected
- Don’t swear unless that is an established part of your relationship with that person
- Don’t share about other clients with your client
- If you are working with multiple family members be aware of not bringing up what was shared
- Don’t complain to your client about your life
- Don’t ask your client for personal favors
- Don’t make the session “about you”
- You can share a personal reference as a teaching point but maintain professional boundaries if they start asking you multiple personal questions redirect the session back to them.
- Don’t wear distracting clothing or jewelry



It's a great idea to ask for honest and direct feedback from mentors or friends about your professional demeanor and appearance. Ask them what you can do better.

Be aware as well that when you become a helping professional, everywhere you go, you bring your reputation, and you can bump into current or potential clients. How can you show up in your community as more responsible and professional? Bring your best self wherever you go, bring business cards, and exude the kind of success, abundance, and professionalism that you want in your life.



Scheduling Clients

Find a simple, easy to interface application, such as Google calendar or iCal, or any others you may already be accustomed to using. Organize your schedule in daily, weekly and monthly allot-ments. Scheduling can be a time consuming aspect of your practice going back and forth with clients.

- Be clear with yourself what your office hours are
- Do not schedule during times when you know you are likely to be tired or rushed
- If you are just starting out, it's always best to make sure you don't artificially limit your hours of practice. Make sure you see clients – even if it means working on the weekends
- Leave 15 minutes in between sessions to prepare and ground yourself
- Be careful not to overbook yourself to the point where you lose your focus, your personal sanity time or the work stops being fun and rewarding.

SCHEDULICITY

Schedulicity is an Online appointment booking integration service launched in 2012 and has 15,000 subscribers booking more than 10 million appointments across the US and Canada. It's the largest system of its kind.

- Daily and weekly calendar views
- Simple & secure for one or many users (or staff)
- Drag-and-drop appointments for easy changes
- Manage daily schedule and/or shifts on the fly
- Color-coding of appointments for easy viewing
- Manage recurring, double or split appointments
- Mobile services, calendar sync, client notes
- ScheduleNow for your website or Facebook
- Clients book for free...anytime, from anywhere

RELIABILITY+

Reliability+ is a patent-pending feature of Schedulicity which allows you to securely hold appointments and class/workshop slots with a credit card. Reliability+ is easy, flexible, virtually eliminating bogus bookings and protecting you from no-shows. Most important, card information is stored according to Payment Card Industry Data Security Standards (PCIDSS) – meaning you and your clients can be confident that payment information is kept secure and private.

HOW IT WORKS:

Let's say a client wants to schedule an appointment and clicks the button. Next, a pop-up window appears to walk them through choosing a service/provider and picking a time from among your open spots -- all without leaving the browser or having to install anything.



THEY ALSO HAVE A MOBILE APP FOR IPHONE AND ANDROID - THE #1 SINGLE-TAP ONLINE BOOKING APP AVAILABLE.

Let's say a client wants to schedule an appointment and clicks the button. Next, a pop-up window appears to walk them through choosing a service/provider and picking a time from among your open spots -- all without leaving the browser or having to install anything.

- Easy client booking
- Edit appointments on the go
- Adjust personal time
- Schedule recurring appointments
- Call or email clients easily
- View messages sent by clients

Price: \$20 per month for a single user; \$30 per month for 2 to 5 users; \$40 per month for 6 to 10; \$50 per month for 11+ users; users personalized business plans are available for larger numbers of users; free trial. On the plus side: It's a clean, easy-to-understand design; provides robust marketing tools and lots of support documentation. However, there is no money-management feature.

BOOK FRESH

There is also a service called Book Fresh. Book Fresh is an online scheduling and appointment booking software that grows your business. Start taking online bookings for your client appointments (and your staff's) ever-changing schedule.

OTHER SERVICES INCLUDE:

- Acuity
- Effortless Calendaring
- Self-Service Scheduling
- Booking Right on Your Website
- Calendar Syncing (Google, iCal, Outlook, etc)
- Manage Multiple Staff Calendars
- Accept Payments Online
- Automated Text and Email Reminders
- Online Customer Reviews iPhone / Mobile
- Dashboard
- Free Small Business Website

Pricing: \$30-90/month + FREE 30-Day Trial



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Seeing Clients in Person - How to Create a Space:

Intuitively, most of us know how the environment - a noisy restaurant or peaceful mountain overlook - has a profound effect on our feelings, mood, and behaviors. Your goal should be to construct a space which will be the most conducive to a successful coaching session.

Make it a No-Ring/No Interruption Zone. Shut off your phones. Both of you. This is a quiet sector. No one should be able to disturb you. No kids. No animals. It's just you and your client.

Make it Inviting. Be aware of permanent barriers between you: your furnishings should be arranged so that they encourage communication and dialog, avoid coffee tables and benches. Give them the tools to maintain a happy body temperature and comfortable position for the duration of the session. Offer tea perhaps or, at the very least, make fresh water available. Provide any combination of cushions, throw pillows and blankets for laps or cold toes. Have tissues in easy reach. Consider fabric choices and colors that are easy on the eyes. Make sure the client chair or sofa is a comfortable one.

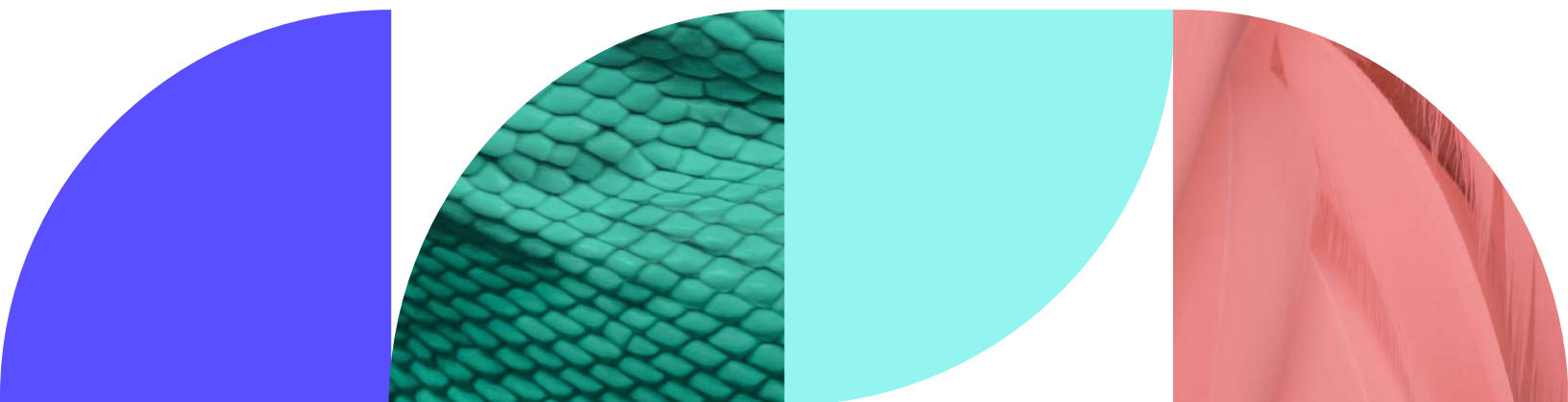
Take note that most of us are naturally drawn towards light. It often feels safe. Seek to create a relaxed level of light in the room. If you have windows, all the better to keep the place well ventilated and airy, but you don't want to blind anyone; if you're getting midday sun straight through your windows, diffuse it with gauzy curtains or shades. If you don't have any windows, use lamps to illuminate the space and soften any harsh or dark corners.

KEEP IT TIDY

The area should be very clean, well kept, and free of dust and pet hair. Be aware that many people have sensitive noses, are allergic to certain smells, chemical cleaners, perfumes or otherwise. While living plants are wonderful, be careful with strongly fragrant flowers.

BE PROFESSIONAL

Keep a pen & paper handy, and take notes when appropriate. Put the clock behind the client's head - easily visible only to you. If you have bookshelves, choose to display titles that reflect your relevant education and practice specialties. Avoid titles like, "How to Get Rich Quick" for obvious reasons.







BONUS 04

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