QUICK START BUSINESS GUIDE

CREATE A CLEAR VISION FOR YOUR IDEAL BUSINESS

What does your ideal business look like?

When you go into business for yourself, you have the capability of creating any type of business you would like. Here are a few kinds of businesses to consider:

Working with clients one-on-one as an independent practitioner

- In-person, in an office space you independently rent or buy
- In-person, in an office space you rent from another practitioner
- Virtually, over phone, Skype or Zoom

Working with clients one-on-one as an allied practitioner

- In-person, in the office space of a chiropractor, MD, ND, or other practitioner (you would be an independent contractor or employee for their clinic)
- Virtually, over phone, Skype, or Zoom for a chiropractor, MD, ND, or other practitioner (you would be an independent contractor or employee for their clinic)

Running group programs

- Conducting corporate wellness programs
- Working with gyms, running group programs and challenges
- Running your own group programs (you decide the location and fill the program with your own marketing)

Creating physical or digital products

- Cookbooks, books, personal care products, and food products
- E-books, online courses, digital meal plans, professional blogging, membership sites
- Running your own group programs (you decide the location and fill the program with your own marketing)

You might also consider businesses outside of the above. For example, starting a biodynamic farm or a non-profit organization. Consider the size and the scope of the business you'd like to create as it relates to the kind of lifestyle you would like to have.

How does your ideal business integrate with and support your ideal life?

Consider:

- How many hours would you like to work each day?
- How many clients would you like to see in a day?
- How many days would you like to work each week?
- How much income will you need on a monthly basis to support your desired lifestyle?

What target market would you like to focus on?

Consider:

- What inspired you to become an NTP or NTC?

- What type of client (e.g. children, couples trying to conceive, athletic men or women, menopausal women, elderly) or health issue (e.g. digestive issues, autoimmune conditions, fertility issues, improving athletic performance) would you be interested in specializing in?
- Is there a type of client or an area of health concern that you feel most passionate about?

(Note: if you would like personalized support in deciding on your target market, the Career Development Course dedicates a full module to this, with Miriam Zacharias, author of the PEACE Process, providing personal direction and feedback for each student's target market statement as one of the lead instructors for the course)

Picture your goals

Consider:

- Where would you like your business to be in 6 months?
- Where would you like your business to be in 1 year?
- Where would you like your business to be in 10 years?

Stop and consider what your life could be like in ten years, having accomplished your goals. How would you describe yourself? What kind of person did you need to be to achieve these goals? Are you persistent? Hard working? Do you wake up at a certain time of day? Limit your television watching or social media scrolling to a certain number of hours per week? Do you set regular, realistic targets for yourself and hold yourself accountable to accomplish them? When you know you have to take necessary steps to move your business forward that might feel scary or intimidating, do you push through that fear and do it anyway? How are you dressing now that you've achieved success? What is your morning routine? What is your evening routine? Are you exercising regularly and feeding yourself nourishing foods? Are you investing in yourself? How are you treating others? Taking all of that into consideration, what steps can you take toward being that kind of person right now?

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What would you like to name your business?

Consider:

- What is the target market you've decided to focus on? Is there a business name that aligns with that?
- Consider using your own name as your business or in your business name (e.g. Sally Sweettooth or Sally Sweettooth Nutritional Therapy)
- Make a list of all possible business name ideas and narrow them down to your top 3. Then, run them through the following vetting process*:
    - Visit the Secretary of State website for your state and conduct a business name search to see if your business name is already taken at a state level
    - Conduct a trademark search of your business name at the USPTO website (uspto.gov) to see if your business name is already taken at a federal level
    - If your intended business name is taken at either a state or federal level, think of other ideas for your business name until you find a name that is available
    - Conduct a website domain name search to see if your intended business name is available as a domain and in various social media platforms using a search tool like Namecheckr
    - If the business name you want is available, purchase the domain through a domain provider such as Dreamhost or GoDaddy

** Please note that these recommendations apply to US-based students. For students outside of the US, please follow the legal process for naming your business within your respective country.*

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LEGALLY ESTABLISH YOURSELF

Research your state laws to ensure you are practicing in a way that is legally compliant

State-specific laws exist for certification, licensure, and registration requirements. Research the laws that pertain to your state so you are clear about how you can and cannot work with clients and the words you can and cannot legally use describe yourself and your services.

Two resources for researching your state laws are the Council of Holistic Health Educators and the Center for Nutrition Advocacy.

As a student of the NTA, you have access to personal support from the Council of Holistic Health Educators, which provides students and graduates with information about current nutrition and wellness practice policy regulation in specific states in the US. If you have any questions about your state laws, you can reach out to the Council of Holistic Health Educators by visiting holisticcouncil.com and using their contact form found under the "About the Council" menu item.

Get insurance

There are several types of insurance policies you can take out as a practitioner to protect yourself and your business, including:

Professional Liability Insurance, which protects against claims made as a result of clients calling your professional judgement into question. For example, a client claiming that there was some sort of wrongdoing in the way of negligence or errors or omissions in your professional work (i.e. malpractice).

General Liability Insurance, which, as an example, protects against claims made as a result of someone getting injured while they are on your physical property. For example, if someone slipped and fell on a wet floor in your office and hurt themselves.

Product Liability Insurance, which protects against claims made as a result of personal injury or property damage caused by products sold through your business. For example, if someone bought a fish oil supplement from you that was very rancid due to improper storage and made them sick.

You can also get Property Insurance, which covers the physical assets of your business. For example, if a fire burned down your office with all of your reference books and any equipment.

The types of insurance you need will vary depending on your situation, so it's important that you work with a qualified insurance agent that can provide you with the proper coverage based on your individual circumstance.

We recommend reading this three-part insurance series written by an NTP:

Insurance Basics for Your Business Part 1

Insurance Basics for Your Business Part 2

Insurance Basics for Your Business Part 3

Decide on your business entity

This will determine the legal status and tax structure of your new business. Examples of US-based business entities include:

- Sole proprietor: as a sole proprietor, you are personally responsible for the debts and risks of your business. Find out more here.
- LLC: an LLC protects you and your family by separating your personal and business assets and helps ensure you're not personally liable for mistakes your business might make. Find out more here.

- Corporation: a corporation also protects you and your family by separating your personal and business assets and helps ensure you're not personally liable for mistakes your business might make. Find out more here.

Using an online legal service (such as LegalZoom) makes forming your business entity fast and economical. Learn more about different business entities here.

When in doubt, consult a lawyer and/or tax specialist who can help guide you (these professionals are also available for hire on platforms like LegalZoom).

Secure the necessary licenses and permits

- Get an Employer Identification Number (EIN; also referred to as a tax I.D. number), by calling 1-800-829-4933 (if not included in your legal package). *Note: this is not required if you are a Sole Proprietor, as you can use your personal social security number)*

- Go to your County Clerk's Office and obtain any business licenses required by your state (if not included in your legal package).

- Once your LLC (or other legal business entity) is established, you have the option of further protecting your business name by trademarking it through the United States Patent Office (USPTO). You can also trademark your business logo. The USPTO website (uspto.gov) will explain how to trademark your business yourself, or you can use a legal service such as Legal Zoom (or similar legal service) to trademark your business.

- If you are selling supplements directly to clients, you will also need to obtain a seller's permit, which legally allows businesses to sell products and report/ pay sales tax. This will vary by state, so visit your official state website for more information *(tip: type the phrase "sellers permit [your state]" into Google to quickly find the page on your state's website that contains the information you need)*.

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OFFICE PROCEDURES AND BUSINESS SYSTEMS

Set up your finance systems

- Open a business bank account (always keep your business and personal finances separate)
- Secure a debit card for that bank account (or a business credit card) that you use solely for business purchases *(Caution: if using a credit card, read repayment terms very carefully)*
- Set up a credit card and payment processing system through a merchant such as PayPal or Square and link this to your business bank account
- Establish the method you will use for bookkeeping. If you are doing your own bookkeeping, use bookkeeping software such as Wave Apps (free, simple to set up) or QuickBooks (monthly fee, more complex to set up but also more features). Bookkeeping software will also enable you to create and send professional invoices to your clients. If you are hiring someone to do your bookkeeping for you, you will still need to send invoices to your clients. You can use Wave Apps to create free, professional invoices or you can use the built-in invoice features that will likely be offered by your payment processing merchants, such as PayPal and Square. You can also use a static invoice template from Microsoft.com.
- Always invoice and collect payment when services are delivered and keep physical or digital copies of all sales invoices for your records
- Keep track of every business receipts for tax purposes (supplements ordered, business meals, gas, office supplies, software, etc, and make a note on the receipt if necessary to show what the receipt is for/how it pertains to your business, e.g. “colleague dinner”)

- If you are keeping track of business income (sales invoices) and business expenses (receipts) digitally, always make sure you back up your computer weekly to protect against data loss

Set up your client management systems

The easiest way to keep track of client scheduling and client progress is through a practice management platform, such as Practice Better or Healthie. These platforms offer booking features, appointment reminders, client messaging, session notes, and program documents all in one place.

If you aren't using a practice management platform, you will need to set up the following systems:

- **Client booking system.** Consider using Calendly, Acuity, or a simple Google calendar for booking and scheduling your clients. The paid versions of Calendly and Acuity also offer client reminders.

- **Client tracking system.** You should have a bird's-eye view method for keeping track of how many sessions you have delivered to your clients (which, for example, informs how many sessions they have left on a package of sessions they purchased). This can be as simple as an Excel document, just be mindful of keeping any sensitive client information safe and secure (e.g. you shouldn't put sensitive client information in an online project management platform such as Trello or Asana).

- **Client paperwork and folder system.** Use the client folder system taught in Module 2 for keeping track of each client's Initial Interview Form, Disclaimer, Functional Clinical Assessment Form (for NTPs), Clinical Presentation Form, and Nutritional Recommendations Form. Detailed records and client confidentiality are an absolute must!

Set up your supplement inventory and product ordering systems

If you are selling supplements in your office, keep a well-stocked inventory of the supplements you recommend most often, and order supplements in bulk to save on shipping fees.

Create a simple method for tracking supplement inventory and reordering. Consider using the Kanban method for inventory management, wherein you use empty baskets to signal when supplement stock needs to be refilled.

The Kanban Supplement Inventory System:

1. Create a card (such as an index card) for each supplement you carry. On this card, write the name of the product, where you order it from, the item number for that supplement, the number of bottles you would like to have on hand at any given time, and at what point you should reorder more. For example, you may find that you sell an average of 15 bottles of Beta TCP per week, so you decide that you'd like to have 20 bottles on hand, and that you will reorder once you get down to 7 bottles to ensure you don't run out. These numbers will be influenced by how frequently you are reordering supplements as well as how quickly your supplements usually arrive once you've placed an order. You can also include your wholesale price as well as your retail price on this card.

2. Obtain two separate baskets for storing each supplement. For our Beta TCP example, you would place 13 bottles of Beta TCP in the first basket and the other 7 bottles of Beta TCP in the second basket behind it, placing the reorder card in that second basket. Once you have worked through the 13 bottles in the first basket and see that it is empty, bring the second basket to the front, pull the reorder card out of it, and place the card in your "need to order" file.

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Smaller volume supplement ordering

When you are in the early stages of your practice and are not selling supplements at a high enough volume to justify having a large inventory on hand, you can track supplement ordering for each client by creating a spreadsheet or Word document for each order and listing what you've purchased on that order with a note indicating which client each supplement is for. When the shipment arrives, mark the sheet as complete. This will help you keep track of what you've already ordered and which supplements were intended for which clients.

Online Dispensaries

You can also consider using an online dispensary (such as Natural Partners or Fullscript), which precludes the need for you to keep supplement inventory on hand and allows your clients to order from your online supplement storefront directly.

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STRUCTURE YOUR SERVICES

Client consultation process

1. Initial Interview: determine you can help the client and build rapport
2. NAQ and Food Journal: gather symptom and dietary information
3. Functional Clinical Assessment (for NTPs): gather clinical information
4. The Plan/Nutritional Recommendations: communicate recommendations
5. Follow-up Sessions: monitor and track progress
    - Remember that proper procedure creates a successful outcome. An in-depth consultation coupled with a superior assessment equals a powerful report of findings that the client strongly agrees with. This client agreement is what helps drive compliance, and client compliance is the key to a successful client outcome. A results-based practice is the ultimate goal!
    - Consider marketing your services in packages, where a client signs up to work with you for a block of time (e.g. three, six, or nine months). In this structure, you may want to see your client every two weeks or once per month. Use the consultations within each package to cover each step (or combined steps) of the Client Consultation Process. Include follow-ups and check-ins in the package, as well as any additional e-mail, phone, or Skype/Zoom consult fees.

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Here's an example of how to structure the delivery of your services with a one-on-one client on a three-month program:

Session 1 (Month 1, week 1): 1.5 hours

- Start with the initial session where you go over the Initial Interview, food journal, NAQ, and pertinent FCA points (for NTPs). Create their plan and give them their most-needed supplements right away. For this example client, we'll put them on a blood sugar regulation diet for four weeks as indicated by our findings.
- Give them plenty of support tools to carry out the plan you've created (such as recipes and handouts), but don't overwhelm them with information.
- Call to check in on them in a week to see how they are doing with the recommendations.

Session 2 (Month 1, week 3): 1 hour

- Discuss how it's been going with the implementation of your recommendations and provide support as needed. If going well, provide three additional action steps along with additional education to support those actions steps. If they are having problems implementing the recommendations, simply help them troubleshoot.
- Review their updated Food/Mood Journal.

Session 3 (Month 2, week 1): 1 hour

- Discuss how it's been going with the implementation of your recommendations and provide support as needed. If going well, provide three additional action steps along with additional education to support those actions steps.
- Review their updated Food/Mood Journal.
- (Optional) Check in on the FCA points you've been targeting and adjust supplementation as indicated.

Session 4 (Month 2, week 3): 1 hour

- Discuss how it's been going with the implementation of your recommendations and provide support as needed. If going well, provide three additional action steps along with additional education to support those actions steps.
- Review their updated Food/Mood Journal.

Session 5 (Month 3, week 1): 1 hour

- Discuss how it's been going with the implementation of your recommendations and provide support as needed. If going well, provide three additional action steps along with additional education to support those actions steps.
- Review their updated Food/Mood Journal.
- (Optional) Check in on the FCA points you've been targeting and adjust supplementation as indicated.

Session 6 (Month 3, week 1): 1 hour

- Discuss how it's been going with the implementation of your recommendations and provide support as needed. If going well, provide three additional action steps along with additional education to support those actions steps.
- Review their updated Food/Mood Journal.
- Check in on the FCA points you've been targeting to reassess progress made. If more work is needed, discuss either having the client sign up for an additional package; if their health goals have been met, have them sign up for a maintenance check-in in three months to see how they are doing, reassess the FCA to provide updated supplements, and to provide them with their next maintenance plan.

Ideally, each client would come back to see you for ongoing maintenance after their intensive program ends (such as every 6 months) to ensure they are on track with nutrition, lifestyle, and supplement recommendations.

Note: you can also experiment with shorter check-ins (such as half an hour), particularly if you are doing phone check-ins, or are an NTC and are not incorporating the FCA component.

CREATE YOUR MARKETING MATERIALS AND COMMUNICATION PLATFORMS

Create your logo

Your logo doesn't have to be ornate nor does it need to cost you a lot of money, but having a logo does help to elevate the professionalism of your brand.

- Do-it-yourself: You can create a simple, text-based logo yourself (i.e., the name of your company written out in a nice font of your choosing) in an online design platform such as Canva or PicMonkey.
- Hire someone else: You can hire a designer through a freelance platform such as Upwork or Fiverr, or start a logo design contest through 99Designs.com.

Create and order your business cards

You should always keep a stack of business cards on hand, wherever you go, as you never know when you might strike up a conversation with a stranger and they ask to learn more about your services. Carry them with you at all times!

- Do-it-yourself: You can create business cards yourself in an online design platform such as Canva and order them from a business card supplier such as Moo.com, Vistaprint.com, or GotPrint.com. Many of these business card suppliers also have business card design templates built right into their platforms that you can customize and use.
- Follow a step-by-step tutorial: After graduation, you will be receiving six months of complimentary access to the Holistic Entrepreneur Association Professional Membership, which provides step-by-step video tutorials for creating and ordering your business cards.

- Hire someone else: You can hire a designer through a freelance platform such as Upwork or Fiverr to design your business cards for you.

Create your website

We recommend that your website have five initial pages for site navigation: Home, Services, Resources (or Blog), About, and Contact. Spend time looking at some of your favorite sites to find other ideas for navigation, site design, and layouts.

- Do-it-yourself: You can create your website using a template (also called a theme) through web building platforms such as Wordpress, Squarespace, or Wix.

- Follow a step-by-step tutorial: If you'd like to create your website on Wordpress, we recommend using the Weekend Web Design course, created by the founder of the Holistic Entrepreneur Association, Jessica Pantermuehl (receive a $50 student discount with the code GIFTFORNTA)*. There are also free resources for website building provided in your complimentary six month access to the Holistic Entrepreneur Association Professional Membership, which you will receive upon graduation.

- Hire someone else: You can hire a designer to create your website for you through a freelance platform such as Upwork or Fiverr or through a private designer.

Set up your consistent email newsletter

The majority of prospective clients won't sign up for your services as soon as they find out about you, which is why it is critical that you nurture the relationship by providing them with regular, valuable content that keeps you top of mind for when they are ready to move forward. A consistent email newsletter (weekly, bi-weekly, or monthly) is an ideal way to do this.

**We are an affiliate of this course, which means we may receive a small commission. We only recommend resources we stand behind and all commissions go toward our scholarship fund to support future NTPs and NTCs.*

- Use an email service provider such as MailChimp, MadMimi, or Constant Contact *(Note: there are step-by-step video tutorials for setting up your email newsletter using MailChimp provided in your complimentary six month access to the Holistic Entrepreneur Association Professional Membership, which you will receive upon graduation).*
- Create newsletter articles that are simple and useful for your prospective clients, such as healthy recipes, tips, and education *(Note: You will have access to pre-written, done-for-you monthly newsletter articles on topics pertaining to holistic nutrition that you can customize or use as-is as part of your complimentary six month access to the Holistic Entrepreneur Association Professional Membership).*
- In your newsletters, consider including a Nutritional Assessment Questionnaire with an offer for a complimentary nutritional analysis and consultation to incentivize new clients to work with you.

Set up your social media accounts

You don't have to be active on social media to become a successful practitioner, but it can be helpful to have a social media presence as a business to provide additional ways for prospective clients to connect with you, and to share value with your audience through quick content that is interesting, inspiring, or educational.

- You can use a social media scheduling tool such as Hootsuite to make your social media posting more efficient *(Note: The Career Development Course provides a full module on social media posting strategy and best practices).*
- You can use online design tools such as Canva and PicMonkey to create your own visually engaging social media posts *(Note: in your complimentary six month access to the Holistic Entrepreneur Association Professional Membership, you'll receive a monthly social media pack with images and quotes that you can use to share on your social media platforms).*

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MARKET YOUR SERVICES

In order to attract a steady stream of clients, you must consistently market your services. While it is possible to create a practice that can rely on word-of-mouth or referrals exclusively, it usually takes a number of years to reach this point and even then, many practitioners still engage in regular marketing. It requires a high volume of consistent marketing to see the best results for your practice.

Marketing can be carried out in a variety of ways, as outlined below. Whenever possible and appropriate, focus on incentivizing email capture so that you can keep in touch through your regular, valuable newsletters. A good example of this is providing a digital information gift that you can offer your lecture attendees in exchange for their email address.

If you would like additional support for marketing your practice, we strongly encourage enrolling in the Career Development Course, which focuses heavily on marketing strategies and provides additional information and instructor-led support for each of the below marketing methods.

Community lectures and presentations

- Consistently delivering community lectures is one of the fastest ways to grow your practice as it helps position you as an authority and allows people to get to know, like, and trust you.
- In your complimentary six month access to the Holistic Entrepreneur Association Professional Membership, you'll receive done-for-you Presentation Kits, which include all of the components needed to deliver a lecture, including PowerPoint presentations, lecture scripts, recipes that you can include to turn your lecture into a cooking demonstration, sign-in sheets, waivers, marketing materials, professionally designed digital information gifts that you can use to incentivize email capture following your lecture, pre-written follow up emails, and more.

- Consider delivering your lectures, workshops, cooking demonstrations, and presentations anywhere that people gather that might fit your target market. Some ideas of where you can deliver your lectures include your local health food store, local farmer's markets, Farm to Table events, WAPF Chapter events, church events, local co-op events, and more.

Networking

- Practice your response to, "What is it that you do?" or "What is an NTP/NTC?" over and over and over until you feel comfortable and confident when speaking about what it is that you do.
- Regularly attend community events, Chamber of Commerce and Rotary meetings/events, networking events in your area, MeetUp events, and community projects where you can mention your services as well as develop a referral network with other like-minded professionals in your community.

Referrals

- Once you graduate, consider sending a letter or an email to your friends and family letting them know of your accomplishment, telling them a little about your new skill set, and asking for referrals.
- When a current client is having great results, ask for a testimonial that you can share and ask if there's anyone else they know of who could benefit from your services as well.
- Connect with other practitioners in your area, such as chiropractors, dentists, trainers, massage therapists, estheticians, and more to develop a network of practitioners you can refer your clients to and who may want to refer their clients to you.
- Always acknowledge clients or other service professionals when they refer someone to you. Consider a warm thank you email or hand-written thank you note.

Media Marketing

- While traditional, printed media marketing can be expensive, you may find good opportunities in local publications such as local magazines and newspapers, health provider directories, and more.
- Your advertisement should have a clear, well-defined message that speaks directly to the needs and desires of your target market.
- Always include a clear call to action in your advertising, ideally one which provides value and makes it easy for those interested to take their next step in engaging with you (for example, provide an easy way to call you for a free discovery session or a way to access an educational gift you are providing, such as a digital download or a seat in your upcoming lecture or webinar).

Above all, remember that the world needs the skillset you have as an NTP or an NTC. You have the capability of creating a profound and positive impact in the lives of your clients. So go forward with confidence, make a difference in the world, and create the business of your dreams!