

HOMEWORK FOR MONTH #1

CLIENT INTAKE FORMS & BUSINESS STRUCTURE

Overview of the PDF LECTURE SLIDES

- **Part #1 Words, Forms, and Legalities:** There are words that you must not use when you are speaking to clients (or others), advertising, writing articles, or describing your natural health office.
- **Part #2 Establishing a Business:** There are specific actions you need to take, and in order, to ensure that you have a smooth path when establishing a business. Page 32 has the actions steps listed.
- **Part #3 Choosing a Business Model:** Physical office or Virtual client sessions?
- **Part #4 Pricing, Inventory & Dropshipping:** How much should I charge for my services? Do I need to have inventory?

Homework from Part 1:

1. Create a **Disclaimer and Consent for Services Agreement** form. If you do not know what your business name will be just put something down that is a possibility. Your form will include: your disclaimer, your disclosure, consent & request for services agreement, client disclosure, and privacy policy.
 - One page is best - no need for multiple signatures.
 - Use clear and uncomplicated language.
 - Yes, you may use the exact words that are in the examples.

Arrangement of Form

Agreement Title - Disclaimer and Consent for Services Agreement

First paragraphs

Second paragraphs

Third paragraph

Ending and Signature

2. Create a separate consent form that includes what is in the original form but also has a paragraph that allows you to share and discuss their assessment, recommendations, and notes with an instructor at Genesis School of Natural Health. It should note that Genesis will not keep the information (files will be deleted) after your internship grade has been recorded.
3. **Recommended Homework:** A form that outlines your policies when your client is a minor. I provided an example but you need to determine what your policy will be - a parent or guardian needs to sign the agreement.

Homework from Parts 2: Create a Cover-sheet for your Client Assessment & Symptom form. It should include:

1. The upper section should include: Business Name, Address, Your Name, Email address, and phone number
2. Middle section should include (and be prominent): Appointment Date and Time and a note to bring all prescriptions and supplements (using or not) with them
3. Last Section should include your Office Policies - you will likely not know exactly what they will be right now - like your business plan, you will make changes!

Homework from Parts 2-4: Create a Business Plan with Action Steps

1. Using the information provided, and information you have gathered from others or experience, create a complete business plan with action steps. Yes, there will be things you are not sure about - write it down with a note (need more info, do after _____, call _____ to find out_____).
2. You will need to set a 1, 2, and 5 year income goal. It needs to be realistic with action steps you will need to take to accomplish the goal. Example: Based on my pricing and overhead, how many clients would I need to see each week/month to have a profit of \$20,000, \$40,000, \$80,000.
3. What is your business model and overhead? If you will be offering virtual appointments will use a software program - which one and how much is it? Or will it be PDF form they can fill in or print and mail combined with a zoom or other option for the the video visit?
4. How do you plan on getting clients? Community events, leaving brochures or fliers in town and other towns close by, offering to speak on a health subject at a gym or private exercise group, placing an ad in local paper, supporting a local school sports team, etc.
5. Yes, a website is needed but, it does not automatically show up on everyone's computer. A website can't replace getting out there and letting people know that you have a business.
6. EVERYTHING IN THE PLAN CAN BE CHANGED! It is vital to have a plan knowing it is flexible and can be updated with new action steps as you go.