

Starting a Natural Health Business

by Sharlene Peterson

Genesis School of Natural Health, 2024



Now is the perfect time to start a business as the public increasingly seeks out professionals who are proficient in holistic, natural, effective, drugless, and non-invasive methods of restoring and maintaining wellness. Starting and running a business however is not as easy as putting a sign on a building or investing in a virtual website meeting place.

Starting and running a business requires a flexible business strategy, goals, and financial prudence. While there are ways to minimize start-up costs, you will need to invest some money, a lot of time, and you may need to work while you build your clientele. What you want to avoid is having to close your doors because you did not properly manage the business side of your healthcare office.

That said, there are many many successful natural health practitioners. The goal of this manual is to help you succeed. In addition to this manual I would suggest reading books about inexpensive marketing and it is never too early to learn how to use an accounting/bookkeeping software program.

This manual is divided into four sections.

- **Part #1 Words, Forms, & Legalities** of this manual will cover legal language and consent, disclosure, and disclaimer statements needed to protect yourself.
- **Part #2 Establishing a Business** will cover the steps needed to officially create a business.
- **Part #3 Business Model** will explore the use of a physical office, virtual/online consultations, inventory, drop-shipping, and pricing for service and products.
- **Part #4 The Pesky Details** is a ramble of how, when, and why. It is my goal to provide you with some of the details that are part of the natural health business experience.

PART #1: Words, Forms & Legalities

What you can say and what you cannot say is getting more complicated with so many groups seeking licensing but, there are a few key words and phrases that you must not use.

DO NOT USE THE FOLLOWING!

- **CURE**
- **TREAT**
- **TREATMENT**
- **PRESCRIBE**
- **PATIENT**
- **DO NOT DIAGNOSE** - tell them they have a disease or an infection!

CURE: The pharmaceutical industry owns this word! Yes, they own it and the law says that **ONLY** drugs can cure a disease, disorder, infection, medical condition.... If you claim that an herb will cure a client (take this to get rid of your sinus infection), you are by law saying that the herb is a drug and therefore, you are giving them drugs and therefore you are practicing medicine without a license.

While it is wrong that an industry can own a word, it is true that we do not heal. We educate the client about the herbs, supplements, nutrients/foods, and modalities that allow the body to function as intended so it may heal itself. We work to find the root cause of the imbalance, deficiency, excess, or condition/environment in the body that is creating the health challenges.

USE THESE WORDS INSTEAD!

- **Balance - Normalize - Restore - Enhance - Improve - Relieve**
- **Clients - Office** (Wellness Center, Natural Health Office, etc.)
- **Provide Information - Educate - Teach - Propose Options - Make Recommendations** (with disclaimer)
- **Review - Evaluate - Determine Root Causes - Assess (Assessment)**

We can acknowledge the doctor-given diagnosis to discuss the causes, symptoms, and prescriptions. We can not, and should not, diagnose - say that they have a disease/disorder. If you suspect they have a disease or a serious medical condition you should tell them that you think the symptoms or _____ seem suspicious and you think it would be best for a medical doctor to rule out _____ so they may make an informed decision about their healthcare.

It is very important that ALL materials are carefully written to avoid any misunderstandings about your education or association with the medical industry and never use the words cure, treat, treatment, patient, prescribe, clinic, or claim they have a disease that was not diagnosed by their doctor. Also avoid any words that may be owned by licensing boards in your state: dietician; counselor (unless stating a spiritual counselor); naturopathic doctor, etc.

Unless you have a degree in counseling, you are not a counselor. Refer clients to licensed mental health professionals when necessary.

You should not take on the role of counselor. What we need to be is a great listener. Listening is very important for the understanding of our client's past and present mindset, lifestyle, time and emotional challenges, exposures to chemicals, and past illnesses or infections that may seem irrelevant but started or contributed to their current health challenges.

Listening provides the opportunity to catch the "little things" that may give us clues to the root cause(s) of their physical challenges. Listening also creates an environment where a relationship based on trust may be established. There is a thin line between giving naturally occurring advice and providing counseling.

"Your customer doesn't care how much you know until they know how much you care." — Damon Richards

How do we help our clients without breaking the law?

There are many articles and books that say you can not "recommend" or "advise" but you can educate and inform. I read an article recently that said Health Coaches should not advise clients on exercise, what to eat, or cross the line into counseling. How can you function as a coach without telling them what to eat and what not to eat? Providing diet, supplement, herbal, and lifestyle recommendations is a natural, needed, and expected part of our service as an herbalist or other natural health professional.

Some authors say we should use sentences like, "If it were me and I had _____ I would". I find this unnatural conversation style frustrating and I believe it would hinder trust with your client. It would be better to have full disclosure and disclaimer statements on your initial paperwork for new clients.

You do need to remember that you cannot say that herbs, supplements, or homeopathics will cure their health challenge. You can say that research suggests that _____ helps with inflammation, supports the immune system, reduces appetite, provides the nutrients required for cellular health, etc.

Examples for writing:

"Several scientific studies suggest that substances in milk thistle (especially a flavonoid called silymarin) protect the liver from toxins, including certain drugs, such as acetaminophen (Tylenol), which can cause liver damage in high doses. Silymarin has antioxidant and anti-inflammatory properties." - mountsinai.org/health-library/herb/milk-thistle

A great amount of data supports the view that rheumatoid arthritis is most likely caused by *Proteus* asymptomatic urinary tract infections via molecular mimicry. Research has also implicated mycoplasmas and subclinical bowel infections caused by *Klebsiella*, *Campylobacter*, *Yersinia*, and *Salmonella* in the development of autoimmune diseases.

Examples for speaking:

Your herbal formula includes milk thistle. It is an excellent herb that supports the liver's detoxification process and also protects the liver from toxins. This formula also contains yellow dock, barberry, and dandelion root for additional liver and bowel support.

There are several mycoplasmas, bacteria, and toxicities implicated as the cause of rheumatoid arthritis. The most common are bacteria linked to rheumatoid arthritis can live in the urinary tract and intestines without any symptoms. While there are several herbs and homeopathic that support the body's ability to eliminate these organisms, a combination of _____, _____, _____ will work best based on your specific health challenges.

Disclaimer, Disclosure & Informed Consent Statements

"Any 'recommendations' you make to anyone you work with as a 'homeopathic advisor' or 'natural health advisor' should be in writing and should state in bold that this is not the practice of medicine nor is it a prescribed treatment and they are responsible for going to their licensed health professional for a thorough review before beginning any of the suggestions you are making to them regarding the natural health solutions available to them. The disclaimer is particularly good because you are telling them up front you are making suggestions and they are responsible to consult their licensed doctor, so they cannot say they did not know." - JA Mentor, Attorney

Your forms should contain a minimum of seven sections and they should not be overly long or complicated. All five sections should fit on one piece of paper.

1. Disclaimer
2. Disclosure
3. Client Disclosure
4. Consent & Request for Services
5. Privacy Policy
6. Signatures

Use the following Form Name / Title:

CONSENT TO TREATMENT and PRIVATE CONTRACT TO TREATMENT

#1: What is a Disclaimer Statement?

Disclaimer basically means a statement that denies something, especially responsibility. "A disclaimer is used to protect your company from claims. You can utilize a disclaimer to limit the scope of your rights and responsibilities. Both parties can exercise and enforce these terms in a contractual relationship. A disclaimer is also vital to protect you from third-party claims." - contractscounsel.com

Example (this disclaimer paragraph also includes a disclosure):

Sharlene Peterson is a Holistic Health Professional. Holistic Health Professionals are not Medical Doctors. I understand that I should continue to see any medical doctors I am currently under the care of, and that any prescription medication should not be altered without first consulting the medical doctor. My Body Organic LLC/ Sharlene Peterson will not diagnose or treat any known or unknown condition, nor make statements that might tend to show intent to prescribe any medication for the treatment of a known or unknown condition.

I understand that natural health care, **muscle testing, electro-dermal screening***, and any additional assessments or therapies are not intended as diagnosis, prescription, treatment, or cure for any physical or mental disease. Natural health care is not a substitute for regular medical care. ***replace with any main modality (modalities) you regularly offer**

Disclaimer for Website/Articles

In the book, *Legal Guidelines for Unlicensed Practitioners*, Dr. Wilson advises that all materials that contain recommendations/solutions also has a disclaimer statement. A disclaimer and disclosure statement should also be placed on your website and electronic newsletters.

Example:

This web site is provided for educational and informational purposes only and does not constitute providing medical advice or professional services. The information provided should not be used for diagnosing or treating a health problem or disease. Always seek the advice of your doctor or other qualified health provider regarding a medical condition.

#2: What is Disclosure Statement?

A disclosure statement is about you- what you are and what you are not.

While the disclaimer statement example above disclosed that Sharlene is a Holistic Health Professional and not a Medical Doctor, you may also want to include your training or education. Training and education may include diplomas, degrees, certifications, courses and seminars, experience and/or professional background. **If you choose to include training it should be short and simply written. You are not writing a resume!**

Example:

I understand that Shari Jones received a diploma for completing her studies as a Holistic Health Professional at Genesis School of Natural Health. I also understand that a diploma is provided for completing professionally guided studies and is not a degree. Professionally guided studies included at least 1,300 hours of study. [MAY ADD] In addition, I understand that Shari Jones has taken numerous seminar training sessions from natural health professionals that focused on nutrition, endocrine system function, blood chemistry, and the immune system.

!!! You may be tempted to leave out the part that a diploma is not a degree. Do not include your training on this formal/legal disclosure agreement/contract if you do not want to include those facts as written. If you are describing your educational background for your website, articles, flyers, etc. you do not need to explain things like professionally accredited or diploma vs degree.

#3 & #4: Client Disclosure Statement / Consent & Request for Services

The client disclosure fits well into the consent and request for services agreement.

Example (firmly advise that you use all three paragraphs):

I agree that My Body Organic LLC/Sharlene Peterson assumes no responsibility for my actions, nor for the results of any action I may take with regard to recommendations made during the time period with which My Body Organic LLC/Sharlene Peterson is retained in the capacity of a Holistic Health Professional.

I also attest that I am solely seeking the services provided by My Body Organic LLC/Sharlene Peterson on my own behalf, and not as an agent or representative of any Federal, State, County, Local Agency, or any Independent Doctor's Office on a mission of entrapment or investigation in behalf of these or any other agencies, either on this or any subsequent visit.

I understand that I am responsible and accountable for all charges incurred, and any subsequent interest and/or past due charges for unpaid balances, including any charges for collecting on all 'past due' bills. Due to Federal Regulations, opened supplements can not be returned for a refund.

#5: Privacy Policy

Example:

All of your personal information is private and will not be shared with anyone or any business for any reason unless we are given written permission. Personal information includes all notes, forms, emails and texts, test results, and conversations with Sharlene Peterson or any employee at My Body Organic LLC. If you would like us to share information about your health goals or our recommendations with your husband, wife, daughter, mother, etc. we will need your written permission.

#6: Signatures

Example

The signatures below signify a contract that is not subject to change or adjustment by any non-vested party. My signature below indicates that I have read all of the above statements and that I accept and understand them completely. I agree to consult with My Body Organic LLC/Sharlene Peterson on these terms.

PARTIES IN THIS CONTRACT

PRINT NAME: _____

PRINT NAME: _____

SIGNATURE: _____

SIGNATURE: _____

DATE: _____

DATE: _____

Additional Form to Consider

I would have a simple form with a statement prepared for when your client is a minor. Have the parent/guardian sign the form.

Just an Example! You will need to determine your own words and policies.

Any client under the age of 18 must have a guardian or parent with them for each appointment. If it is a sensitive subject and the child does not want to talk with a parent in the room it is up to the parent. We will not meet with your child without your knowledge. We are not counselors. If a subject comes up that is not about basic emotions/feelings and physical symptoms we will tell the child that it is something they need to talk to their parents or a counselor about. We will ask them if we can share their concerns with you. If the minor shares anything that would be life-threatening, like suicidal thoughts, we will inform you immediately.

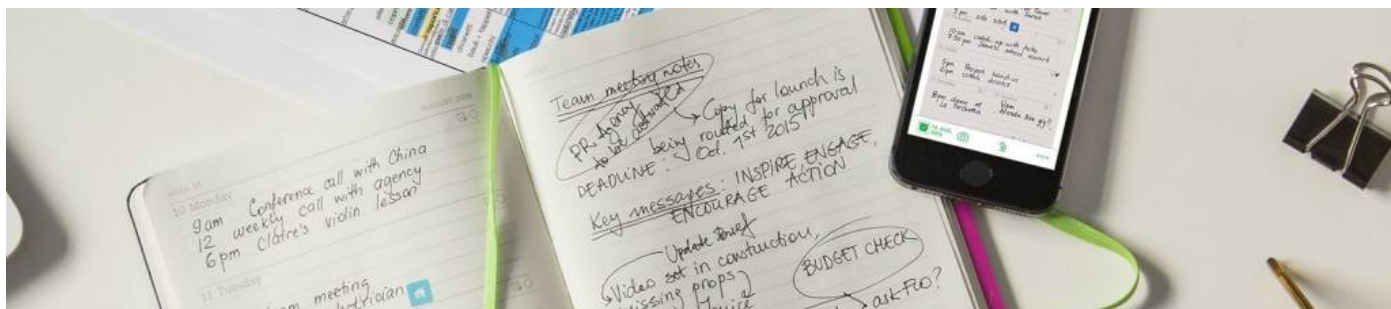
I personally only had a few preteens and teenagers look at their parent when I asked about any of the symptoms or when the subject was about feeling anxiety or feeling low or depressed. The parents volunteered to leave without missing a beat but they also already knew and trusted my judgment. I was very happy that the children did not have something very serious to say about their home or situation - they just didn't want to talk in front of their mom.

“To know even one life has breathed easier because you have lived; that is to have succeeded.” —Ralph Waldo Emerson

You may copy all the information presented to create your legal form.

- CONSENT TO TREATMENT and PRIVATE CONTRACT TO TREATMENT
- Disclaimer
- Disclosure(s)
- Client Disclosure
- Consent & Request for Services
- Privacy Policy
- Signatures

PART #2: Establishing a Business



#1: Choosing a Business Name

Before you can settle on a business name you must check to see if there is a **trademark** for the name and if the name is already **registered in your state** (an entity name).

Businesses in every state are subject to trademark infringement lawsuits. Ignoring this step can be costly! You need to check your ideal business, product, and service names against the [official trademark database](#) maintained by the United States Patent and Trademark Office. In addition, you should also search for similar business names using internet search engines.

After checking your ideal business name against the trademark database you will need to go to your state's website and see if someone else has already registered the entity name with your state. Your entity name is how the state identifies your business. Most states don't allow you to register a name that's already been registered by someone else, and some states require your entity name to reflect the kind of business it represents. In most cases, your entity name registration protects your business and prevents anyone else in the state from operating under the same entity name. - SBA.gov

DO NOT REGISTER YOUR BUSINESS NAME UNTIL YOU DECIDE ON THE STRUCTURE.

Registering your name protects it. There are four different ways to register your business name. Each serves a different purpose and some may be legally required depending on your location or business structure [sole proprietorship, limited liability company].

- Entity name protects you at a state level **[File your LLC]**
- Trademark protects you at a federal level
- Doing business as (DBA) doesn't give legal protection, but it might be legally required. The bank, when opening a business account, will ask what your DBA is - it can just be the name of your LLC business name. Search the internet for your area or state! You don't want to be confused with another business in your area.
- Why would someone have a DBA? Sometimes the LLC name is not close to what you want as a business name. Also, some people have more than one business. **Example:** If your state registered name is Johnson & Shane Enterprises LLC you can get a checking account with a DBA that says Pathways Natural Health and another checking account with DBA Johnson's Excavation Services. Both under the umbrella of the same LLC.

#2: Choose a Business Structure & Register your Business Name

There are various business structures but most small businesses will either choose a sole proprietorship or a limited liability company (LLC). With an LLC you will be the owner/member. You can have other members but first talk to an accountant so the details are clearly understood for taxes and ownership. If you will be listing your spouse as a member there are tax considerations - if done right you could save money on taxes - again, an accountant will be worth the money!

SBA.GOV - Sole Proprietorship

A sole proprietorship is easy to form and gives you complete control of your business. You're automatically considered to be a sole proprietorship if you do business activities but don't register as any other kind of business.

Sole proprietorships do not produce a separate business entity. This means your business assets and liabilities are not separate from your personal assets and liabilities. **You can be held personally liable for the debts and obligations of the business.** Sole proprietorships can be a good choice for low-risk businesses and owners who want to test their business idea before forming a more formal business.

SBA.GOV - Limited Liability Company (LLC)

- An LLC lets you take advantage of the benefits of both the corporation and partnership business structures.
- **LLCs protect you from personal liability in most instances, your personal assets — like your vehicle, house, and savings accounts — won't be at risk in case your LLC faces bankruptcy or lawsuits.**
- Profits and losses can get passed through to your personal income without facing corporate taxes. Members of an LLC are considered self-employed and must pay self-employment tax.
- LLCs can have a limited life in many states. When a member joins or leaves an LLC, some states may require the LLC to be dissolved and re-formed with new membership — unless there's already an agreement in place within the LLC for buying, selling, and transferring ownership.
- LLCs can be a good choice for medium- or higher-risk businesses, owners with significant personal assets they want protected, and owners who want to pay a lower tax rate than they would with a corporation.

Forming your LLC is the first step after choosing your business name to avoid changing all the federal, state, and bank information if you form the LLC later.

An easy way to have the LLC formed is to use <http://www.uslegalforms.com/corporatecenter/llc-formation.htm>. There are other online options. They have a set price plus you will pay them for your state's filing fee (**they will file the LLC for you**). After the initial filing, your state will send you an invoice for the annual fee. Each state determines the initial and annual costs.

#3: Federal Tax ID = Employer Identification Number

- Your Employer Identification Number (EIN) is your federal tax ID.
- You need this number to pay federal taxes, hire employees, open a business bank account (this varies), and apply for business licenses and permits.
- It's free to apply for an EIN, and you should do it **right after you register your business name with the state (your LLC)**.
- [Apply for an EIN with the IRS assistance tool](#). It will guide you through questions and ask for your name, social security number, address, and your "doing business as" (DBA) name. Your nine-digit federal tax ID becomes available immediately upon verification..

#4: Business Checking Account & Business License

- Now that you have a business entity name (LLC), decided on your DBA name, and have your federal tax ID# (EIN) you can easily open a Business Checking account.
- Check with the Small Business Administration in your state. Do you need any licenses in your state? If you have sales tax in your state you will need to get a sales tax license. Each state has different licenses that may be required.

#5: Liability Insurance

Professional liability insurance is sometimes called “malpractice” insurance. Professional liability is a risk that a natural health professional could face if their client has a negative outcome from following your advice or service. You should have professional liability insurance to protect yourself from any potential legal or financial consequences. Your LLC and disclaimer/disclosure/consent to services form is an added protection.

General liability insurance: According to The Hartford, "General liability covers physical risks, such as bodily injuries and property damage. Professional liability insurance covers more abstract risks, such as errors and omissions in the services your business provides."

- The American Naturopathic Certification Board lists the professional liability company [Alternative Balance](#) as an option.
- [Hiscox](#) offers small business insurance that can provide general liability, professional liability, cyber security, and medical malpractice coverage for health coaches.
- [GEICO](#) provides wellness and fitness professionals (which includes health coaches) professional liability insurance that covers defense counsel, HIPAA violation defense, wage loss/deposition expenses, and more.
- **Note:** Most policies cover most or all areas of needed coverage - you will not need multiple policies.

If you choose to make and sell your own tinctures, collect your own herbs to make tea blends, etc. you need to be diligent with labeling, dating supplies and location, and probably much more! If you are using purchased dry herbs to make your tea blends make a lot # and label/write it on the package you are selling. In your files write down the company that supplied the herbs and date purchased and if they have a lot# include that information.

If you are seeing clients in your home or on your property you need to have insurance to cover falls etc. - your home insurance covers visitors but that doesn't mean it covers clients/home business. If you are renting you may need general liability/renter's insurance (the owner of the building may have it covered).

#6: Accounting Software & Merchant Account

Your online accounting software is very important! Some are overly complicated and are not flexible. At minimum you should be able to create invoices, create online invoices, and the software should **integrate with your merchant account** (credit card processor account) and connect to your bank account and credit card account. Ideally it would also include the ability to upgrade for payroll and the ability to track inventory.

Inventory tracking is part of your business tax filing requirements. **You must make yourself an invoice (use the wholesale price) for any product you take for personal use. In addition to tracking profit and loss, if your state has a sales tax, the invoice will also show the sales tax due. Yes, you have to pay sales tax on any items you use.**

Sales Tax: If your state or city (usually both) has a sales tax, your accounting software needs to be set up with the proper rates. You will need to pay sales tax every month and the accounting software makes this easy.

FreshBooks is a growing company and integrates with Stripe (a very good merchant account provider). Ask a few business owners what they use and what they like and dislike. If you call in advance, most business owners would be happy to talk to you. **Quickbooks** is very popular but they are constantly raising prices and are hard to deal with if you have any problems. However, they do integrate with almost any merchant account provider.

Find a bookkeeper! They are not overly expensive and can help or set up your accounting software for your business (items, categories, etc.). Taxes and tracking profit and loss are easy if the books are set up properly.

STEPS FOR ESTABLISHMENT

1. Search the trademark and your state databases before settling on a name.
2. Create an LLC and Register the LLC with your state
3. Get a Federal Tax ID # (EIN)
4. Open a Business Checking Account
5. Apply for a sales tax/business license with your city/state.
6. Purchase Liability Insurance(s)
7. Choose an Accounting software program and Merchant account that integrate

PART #3: Choosing A Business Model



With the explosion of online software for health businesses, drop-shipping, and improved website/video meetings, the business model for health professionals is not limited to a physical office. You may choose to have only a physical office, only a virtual/online office, or offer a combination of both physical or virtual appointments. There are benefits, drawbacks, and policies with each model. We will start with the physical office.

Physical Office

A misconception about a physical office is that a person needs to be at the office from 9-5 everyday. As the business owner YOU get to choose the days and hours that you are open.

It does not matter what your hours are, how you want to handle orders, protect privacy, and ship orders as long as your customers know your policies. However, you must not change the hours or policies without notice.

If you say you are available until 3:00 pm and they arrive to a locked door, you have broken trust in your word. It is not a little thing to drive to your place of business, park, get to your door and have to turn around - what are they saying to themselves?

If you are going to be on vacation, or you have an appointment, all you need to do is email your client list (you must have an email list).

- Email 2-3 weeks before a vacation if you will be gone a week or more. Let them know they should order or pickup any refills by _____. And that they should schedule an appointment as soon as possible if they will need one shortly after you return.
- Email 5-7 days ahead of any appointments that will result in you being gone during the established office hours.
- A true emergency - note on the door but most things are not true emergencies!

If you are working alone, or if your office space would mean a walk-in would see your client, you need a set **privacy policy**. Your clients want privacy and your full attention (not interrupted by someone who wants a refill on their herbs) so they will also be pleased with the office protocol.

Let your clients know when they can come to pick up supplements. Maybe it is between 11:30 - 12:30 and then you leave for your posted lunch hour and again from 5:00-5:30. Even better, tell them that if they email or text the day before with what they need you can have it ready for pickup - saves them time. They just pay and go with their package.

It is vital that you are not distracted. Your client should have your full attention until they walk out the door with their directions, products, and questions answered.

When they leave you may have something that comes to mind - write it down in their folder and put the folder away. You need a clear mind for your next task and you need to be able to leave work at work. There will always be something you think you could have added but, is it an emergency or detrimental?

Office Policy Example:

Make post cards or half sheets and have them on your desk to give out and to remind clients.

******This same policy should be included on your coversheet for the Client Assessment & Symptom Form that they fill out.

If you have a front desk receptionist/office manager and a room or private area to consult with your client some of this will not apply.

Business Name, Your Name, Office Hours are 8:00-5:30 on Monday, Wednesday, and Thursday.
Phone: 000-000-0000. Email: jjj@jjj.com

I value your time and want to give you the attention and privacy you deserve during your appointment. To accomplish this I need all clients to do the following:

- Supplement pick up times are between 8:00 - 8:30 am, 11:30 - 12:00 pm, and 5:00 and 5:30. If this doesn't work please let me know and we will make other arrangements. These are also the best times to stop by if you have a question or need to schedule an appointment.
- If possible, please email, text, or leave a phone message telling me which products you will be picking up at the office. I will be able to have them ready for you if you let me know what you need the day before you arrive or early in morning on the day you will arrive..
- There will be a sign on the door that says "In a Meeting " when I am with a client. This means I am unavailable and you will need to email or text to let me know you need to set up an appointment or have a question.
- I will be answering phone/email messages between appointments. Email and texts work the best so we are not playing phone tag. Emails also give me time to look at your folder before calling you.

The Benefits of a Physical Office

You are able to view your client's nonverbal communication, their body language, in its entirety. There are subtleties that can be lost or under-appreciated when you are viewing a person sitting in front of a computer camera.

- Do they have a large "personal space" need, fairly neutral, or do they reach out and touch your hand or arm when they are talking or when you finish the session?
- Can they hold eye contact?
- Do their nails look rough or do they bite their nails?
- Do their ankles or legs look swollen?
- Do they appear stiff when they get up to walk?
- Do they appear tense or stressed?
- Are they "open" or do they cross their arms, roll their shoulders forward, shift a lot when you are asking questions?

There is also a trust connection that is much harder to establish without a physical presence. Too many people are lacking physical touch and attention and if they have been to many doctors they will also feel unheard. They often need the physical one-on-one eye contact to feel like you truly heard them, believe them, and care.

Clients may find it easier to communicate in a physical setting, especially if they feel more comfortable and at ease away from a busy or stressful home. Some clients may not have a truly private location for a virtual session. It also eliminates any technological issues or worries about looking good "on camera".

The benefits your client receives is almost always passed along to the client's friends and family. Often they are recommending you before they have seen or felt the results! This of course is dependent on your listening skills and ability to provide education and encouragement.

The Drawbacks of a Physical Office

If you live in a small town or in a rural area it can be more challenging to grow your business. The biggest challenge really is that it just takes more time. Your clients will drive many many miles to see you if they trust in your abilities. Visit towns and cities as far away as you can to hand out or leave your business fliers.

There are times when the weather, finding day care, or family illnesses can cause a cancellation but a virtual meeting would be possible.

Higher startup and monthly costs: rent, utilities, internet, office/rent insurance, inventory, etc. If you have a first floor room in your house that you can make very private and a powder room/ bathroom that a client may use (must always be clean and with paper towels for drying hands), starting at home or even making it a permanent office works for many. Check your city and neighbor laws on home businesses!

Virtual Office

Virtual health sessions, visits, consultations, etc. are becoming more popular. Even medical doctors are implementing “telemedicine” more often. More popular does not mean that the majority of people want a virtual visit, it means that more health professionals are offering virtual appointments.

The advantages include convenience, lower overhead expenses, and the ability to serve clients from anywhere. Another positive aspect is that clients who do not have the time or ability to travel because of children, health, or work, will likely embrace your ability to see them virtually.

Drawbacks include a non-physical relationship which is easy to break. A virtual only office is also not as family friendly. Parents will feel more comfortable with someone who can really see their child/children - holding them up to a computer screen will never replace a physical person. There are many potential clients that are not comfortable with technology and also those who feel self-conscious on camera. A non-physical office is also harder to promote within your own community - why doesn't she have an office?

Technology can be a double-edged sword. A downside can be paying someone to develop your social media platforms so you can reach prospective clients - you will need to learn how to do much of yourself until you are making a steady income. However, you can promote your virtual office the same way you would if it is a physical office - leave fliers all around your area as well as any town or city you pass through, offer to speak to ladies groups or health food stores, attend or have a booth at wellness fairs on the other end of your state, etc.

Software: There are more than a few online software programs for health coaches (the popular term right now). The pricing and features vary greatly. I do not have experience with any of the programs but I would trust Integrative Nutrition to know which ones work well: Their blog titled *The Eight Best Health and Wellness Coaching Apps for Coaches* can be found at this link: www.integrativenutrition.com/blog/health-coach-apps.

Example from the Blog:

Healthie is an all-in-one practice-management platform created with Health Coaches and wellness entrepreneurs in mind. Healthie offers a platform to house client records, schedule appointments, video chat with clients, and handle billing. Coaches can work with clients to create their wellness goals, set reminders and get encouragement, and track their progress through the Healthie app.

Key features: Group and one-on-one video chat functionality; HIPAA, PIPEDA, and GDPR compliance; Client charts you can customize with your branding and logo; Secure storage of credit cards in order to process client payments; Integration with a variety of wearable health trackers, like Fitbit and Apple Watches; Various appointment types and automated appointment reminders; Ability to record and share your own videos and webinars. Pricing: \$29 per month, for individual coaches

NOTE: It is not necessary to have an app to offer virtual health visits. You may prefer to have your own website, use zoom, and send online invoices from your accounting software integrated with your merchant account. This is especially true if you already have a physical business and want to add virtual visits.

Combination or Physical & Virtual Office

A combination of physical and virtual appointments is probably ideal for most health professionals and most clients. The clients that need or prefer to see you physically will be pleased. If they are unable to make it to an appointment they may choose to do it virtually or even reschedule to do it virtual - they will need to be reminded that it is a choice. If a local client is interested in having virtual visits they will be pleased. I do think that if they are anywhere close to local you should encourage them to be physically present for your first session.

A virtual option gives you flexibility. You could schedule only virtual appointments for a period of time if wanted or needed (work-vacation, visiting family, long road trip...). You could choose to only have the physical office open 2 days a week and work from home on other days. Remember that it is your office and you can choose the days and hours. The only rule is that your clients know which days/hours and you don't change them on a whim.

Pricing Guidelines (based on internet searches)

- Health Coach Pricing for One-on One Sessions (2023 data from gathered by FoodMatters): The average price was \$200 and the most common price was \$100 per session.
- Based on my internet search of natural health offices it was common to have a first visit charge that was at least double of what the follow-up visits cost.
- It is reasonable to charge \$150 - \$200 depending on your area for the first visit. The first visit is usually 1.5 - 2 hours depending on the complexity and if you do muscle testing. Plan for 2 but aim for 1.5 hours.
- Follow-up appointments should not be less than \$75 but more than \$100 can severely limit your client base. The herbs, supplements, etc. also needs to fit into their budget. Most follow-up sessions are 45 - 60 minutes.

Packaged Appointments: While packages provide an instant larger profit, you may be limiting your clientele. Not everyone can immediately afford \$1,000 plus the products. Some potential clients may be skeptical - spending so much before they even know if you are "good". It may work to offer package deals to existing customers if it results in a 5%-10% discount for them. Packaging works for some health professionals but I wouldn't make it the only option.

Current Clients: Quick and Acute Condition Recommendations (30 minutes or less)

- Always have a set minimum price of around \$25 - \$35 for CURRENT CLIENTS
- When a quick visit is scheduled because an acute situation that has surfaced (flu, sinus issues, possible bug bite issue, diarrhea, etc.) you will likely already know what you should give them. You may choose to not charge the minimum - making profit on the products. I would not do this if the client has not been in recently for a follow-up appointment or has not been buying your products for refills but, giving a loyal customer a discount from time to time is wise.
- When it is an acute condition and you need to sit down and gather more information and you use at least 15-20 minutes then yes, you should charge the minimum or they may think you will work for free.

Walk-in Clients: Quick and Acute Condition Recommendations (30 minutes or less)

- Always have a minimum set price of around \$35-\$50 for “WALK-IN” CLIENTS
- Don't forget to have them sign a consent form!
- “Walk-in”: It could be a trust issue in natural substances, it could be finances, but you may have people who call you for help with an acute condition but do not want a full evaluation. Let them know you will need to ask a few questions when they arrive to determine what they may need.
- When they arrive, in addition to hearing about the sudden symptoms, ask them if they have had this condition (sinus, gut issue, flu, bad colds...) in the past. Either way, let them know that there may be an underlying issue that needs to be cleared up if the herb and supplement combination does not stop the congestion or if the symptoms return.
- Send them home with a brochure/flyer so they have more information about your services. DO NOT LET THEM TALK ABOUT OTHER HEALTH ISSUES. TELL THEM - It sounds like you have some health challenges we need to explore in addition to your sinus issues. Would you like to make an appointment for a full evaluation? .

Note On Time: I realize that there are offices where they spend only a few minutes with a client and then have them come back over and over (sometimes 2-3 times a week) to do muscle testing and change supplements. I personally have an issue with this all-to-common scenario. The first visit needs to be very thorough. You need a clear picture of their symptoms, lifestyle, stresses, exposures (past and present), support system, and time to educate and inform them about why you are choosing the foods, supplements, herbs, or other healing modalities. You need to have a plan and at least an idea of the probable root cause(s) and that takes some concentrated time.

The problem with muscle testing every week is that we have trillions of cells, 25+ feet of intestines, and miles of blood vessels. You can't rebuild anything in a week and you certainly cannot kill of parasites or candida in a week. It is also important to remember that when you test a product and it is neutral, it does not mean it will not be needed the next day. It is better to know your herbs, understand what organs and systems you are targeting, and which vitamins and minerals may need to be replenished based on the past and current diet, stresses, and toxicities. Muscle testing is a tool, it does not replace the need for a logical plan.

Be prepared for the question - How much does it cost? We charge \$150 for the first evaluation which usually takes 1.5 to 2 hours. It is important that we have time to address all your concerns and I will need detailed information to determine the best course of action. The cost of supplements is separate and depends on what you need. Follow-up sessions are \$75 and usually take an hour.

Family Rates: It is very likely that you will see families and this is when a physical office is highly effective and a virtual office would be ok at best. For pricing I would suggest full price for each adult and depending on the amount of time you spend on each child it may be 25-50 each. This of course is when they all gather into your space at the same time. **Young adults:** First visit at \$100 and follow-ups at \$50 is usually a good price point based on time.

Your Inventory

Start as small as possible! Invest in your business with the profits (grow the inventory). Until you have a business surplus in the bank to buy inventory and/or for slow times, do not spend the profit from your product sales. You sell one and next time you can buy two - this is how you grow your inventory.

Do not overspend on anything - debt is bad for business and life. Just because you can save 10% on a huge order does not mean you should. If you are very busy and the products will be sold within 3 months it may be worth the investment but.... order as needed! If possible order enough to get free shipping because this adds up! For the price of shipping you could have 1-2 additional products on the shelf so shipping is really double (the price plus what you could have made with that money).

Almost all products are sold at 50% profit. Paid \$14.00 for the bottle and sold it for \$28.00. Some products are set up as 35% by the company. Some items are very expensive and you may choose to sell at 30% profit instead of 50%. Some products unreasonably high priced for the ingredients! Most of the time you can find another product that is reasonable with the same results.

Beware of marketing hype and fads. **Example:** Vitamin D is very cheap but if a company puts it in an oil base they can say it is more absorbable. You should know that vitamin D is fat-soluble and therefore it should be taken right before eating food that contains fats or with a fish oil supplement. All supplements should be taken right before or right after eating so that it is digested fully - exposed to the stomach acid and enzymes released when eating a meal.

Do not bring a multi-level marketing company product line into your office. They are always over-priced and once your clients understand that you are rewarded for more sales they will question your judgement on choosing the best product for them. What do we think when a doctor gets a kickback for prescribing specific drugs?

Herbal Inventory: The most cost effective (for your client) and the profitable way (for you) to make money when your client needs herbs is to prepare as many of your own herbal combinations as possible. You are also preparing a custom formula which is not available anywhere else (good for you) and the formula contains only the herbs that you think are necessary (good for them).



Investing in bulk tinctures is one of the best things you can do for your clients and for yourself. Professional Formulas is an excellent herbal company and very reasonable. They carry almost everything and also make tinctures that are concentrated - no "watered down" 1:10 ratios. By bulk I mean 250ml bottles (about 8 oz). Most formulas you combine will be placed in 60ml/2oz bottles. You will need 2 oz. amber bottles, a beaker to measure, and labels to write on.

We primarily used 2 oz. bottles when combining our own herbs from our bulk herb supply. The 4 oz. bottles are great for longer-term nutrient or herbal blends. At 30 drops 2x per day a 2 oz. bottle lasts about a month. You may want to order 50-100 bottles at a time! Make sure you wash your hands before putting the droppers in the bottles! Prepare many at one time for your shelf and close the box tight so the remaining bottles are kept clean. For bottle labels we used mailing labels that we formatted (keep a saved copy on your computer) with Name: Date: Herbs: - we would fill out the label before putting them on the bottle. Fill the bottle with herbs first - no drips on the label.

Herbal Area: A very important item in your office, if you are making your own herbal combinations, is a sink. You must have one to wash your hands before measuring the herbs and for washing the measuring beaker you use. If possible the sink should be in the same area where you consult with your client. They love to watch you go through the process.

You need a dedicated counter space for preparing the herbs. It literally only needs to be 24 inches wide but it should never have anything on it except your herbal bottles while measuring, a beaker, paper towel, label(s) and the tincture bottle(s) you will be filling.

If a sink is not possible and you must use the bathroom to wash your hands, it is vital you leave the door open so you do not need to touch it on the way out. Use a paper towel to shut off the water (dirty handles), and grab a new paper towel to dry your hands. If you dry your hands on the way back to your client, and throw the paper towel away where they see you, they will not wonder if you have clean hands when you start to prepare the herbal combination.



Inventory/Office Area: It is important, regardless of the size of your inventory, to make it look sufficient and organized. Every new client will be making assumptions and judgements about you based on what they see and hear. Is it clean and organized? Is it welcoming or sterile like the doctor office or too much like a family living room?

Add additional shelves to the book case(s) so products are closer together. You can have a lot of inventory and look like your business is struggling when the selves are much taller or deeper than you need.



An old bookcase with the same size shelves is a good way to get extra shelves and it only takes a small piece of wood screwed to the side for a “rail” to hold your shelf.



NO Inventory Physical Office or Virtual Office

It is a mistake to send clients to a store to pick out a vitamin C supplement, multivitamins, etc. They do not know which ones may contain synthetic vitamins (like folic acid), inferior minerals (like magnesium oxide), and chemical additives. It is also a mistake to send them links to good products from 3 different websites. I say mistake because you do not know if they decided to order somethings later when you intended the herbs and supplements to support each other.

It is a mistake to throw away profit - pass it on to someone else selling products. For most offices, the profit from the supplements is greater than what they earn from the consultation. Many supplements will be refilled - more profit. And most importantly it also means continued contact with you and many years of service.

Dropshipping: There are individual professional companies that now drop ship. The main problem is that there is rarely one company that can satisfy all your needs for one client. They may have the best homeopathic for your client but do not sell a great mineral blend or B complex. Shipping can get very expensive when what is best for your client would take 3 different orders.

Fullscript.com is one company that sells many great brands. The website appears to only accept doctors and licensed individuals but it does have a listing for designations like herbalists. You will need to upload a PDF or JPEG of your diploma and transcript.

You will want to get setup as a **Profit Dispensary!** It is not difficult and you can earn 35% on your client orders or set it up so the customer gets a 5% or 10% discount and you would earn 25-30% profit. [www. support.fullscript.com/articles/profit-dispensaries](http://www.support.fullscript.com/articles/profit-dispensaries)

FullScript: To start earning a margin of patient orders, we'll need the following to set up an account with our payment processor, verify your identity, and enable payments:

- Your legal name, date of birth, and physical address for identity verification purposes.
- US accounts: Last 4 digits of your social security number (SSN). Be aware that you may be required to enter your full SSN to verify your account successfully.
- Business accounts: Employment identification number (EIN) or business number (BN).
- Your tax classification

Profit account holders become the 'seller of record,' inheriting the responsibility to report income earned from Fullscript to the Internal Revenue Service or Canada Revenue Agency come tax season. **Fullscript maintains sales tax responsibility at the state level (you don't need to track sales tax).**

ALWAYS AND NEVER!

You have just completed a 1-2 hour appointment with a client and discussed the diet changes, lifestyle factors, probable causes for their health challenges, and which herbs & supplements would support or encourage their body to heal.

Do Not let them leave empty handed! You just told them they need specific products and waiting for the products can create a bit of anxiety because they need them now (that is what we have told them). If they are waiting for an order that includes a parasite formula they will be anxious because the idea of having parasites can be upsetting. Let them know that parasites are common (most are) and when under control they typically don't cause issues. The food changes will help with the inflammation and strengthen their immune system which helps greatly when using any formula to eliminate excess intestinal bacteria and parasites.

If you are not going to carry any inventory or only do virtual appointments you need to give them something physical and something to do right away. Give or send/email them a food & mood journal page, a food chart to help with choosing groceries, a few recipes, and specific diet recommendations based on their health challenges and possible food sensitivities.

If you have a physical office and don't want a full inventory, consider having items for acute conditions and basic vitamins and minerals. Acute care would be fever, ear infection, diarrhea, coughs and congestion... situations where an herb(s) or herb(s) and homeopathic would be ideal and needed right away. Basics would be fish oil, vitamins C and D, a B-complex, a whole-food multivitamin formula, magnesium, calcium/mag, and a formula to help with anxiety/acute stress.

PART #4: The Pesky Details

The Web of Interaction

Each client will form an opinion of you and your office. They will get their first impression from either you, your social media and website, your front manager, or from the person telling them about their experience.

Let's start with you and those who do not know you, have not met you before. How do you dress and look at work? I am going to speak to the ladies about this subject. I would recommend that you dress in a manner that is never revealing (no cleavage, no skirts showing more than your knees). You will be bending over and squatting down several times a day. Women do not generally appreciate, and are often uncomfortable, when women dress in a revealing manner around their husbands (You do want her to feel you are good for the whole family!) or children. Revealing clothing never looks professional. The top you wear is just as important when it is a virtual office visit.

Men and Women: Dress in your own style but make sure you are not overly dressed up or down COMPARED to your clientele. You want to be professional but also approachable, someone they can talk too about anything. If they are not comfortable with you, if they do not trust you as a person, they will not come back! **Never have dirty hands/fingernails.** If you garden you will need to scrub well.

NEVER name another client even if you know they know each other. How well you guard all names and information is the degree to which all clients will trust you.

Example: Do you know Amy Burns? Yes. What is wrong with her? I'm sorry but I never share information about another person. You will need to ask Amy. When you want to use another client as an example say "one of my clients was also..."



In addition to meeting you personally, a person's first contact may be the phone. **Answer the phone the same way every time.** Write it down and put it by the phone until you memorize it - keep it simple but include your business name and your name. If your contact is via email, create a first paragraph or greeting response to use for every first contact. Create a footer/last paragraph to use on all emails.

My Body Organic, this is Sharlene, how may I help you?

You also need to write (for you and your office manager) a paragraph that explains what you do - this is a common question in and out of the office. Don't just talk about yourself, talk about what you do for clients. My little saying was very casual. "I have a natural health office where I help people get well or stay well. I use herbs, vitamins, homeopathics... whatever it takes to help their body heal itself."

This little saying was all that was needed for them to ask additional questions or not. When they did not it was usually because they have already determined that natural health stuff was quackery. Don't worry about it, just ask them what they do or change the subject with a different question. The ones who ask questions tend to ask many! If they ask too many questions - like it is an appointment - give them a little time but don't let people use your time off or your time for free.

“I am always getting sinus infections, is it true that goldenseal would work?” It does work for some people but if a person gets sinus infections often they may need different herbs or a different approach. I don’t like to recommend herbs and supplements without knowing a person’s medical background. Would you like a business card?

Back to the phone call. Be prepared to answer questions and reassure the person calling that you care. This is expressed in your tone of voice so do not rush them, ask them how they heard about you, if and when they are ready to schedule, let them know how long it takes for the first appointment and ask them what days and times work best and then give them a couple of choices. Don’t say pick a day or time (I am not busy!).

Scheduling: Take the caller’s full name and phone number. Tell them you need to mail or email them a Client Assessment & Symptom Form and Consent Form so you will need their address/ email address. Ask them if their phone gets text messages. If yes, let them know you will send an appointment reminder. If no, ask them if they have an email.



If using a physical calendar, write all this information, in pencil, in the appointment book. Also write a large “F” for form and circle it - when you actually mail the form just put a checkmark through the “F”. Tell them to bring the form and all the bottles of vitamins and prescriptions they are taking to their appointment. If they stop by and make an appointment you should still write the “F” - even if the forms were handed to them.

Why emails or texts? You can spend a lot of time playing phone tag!

On Mondays (or your first day of work) email or text the clients you have scheduled for Wednesday thru Friday. Write something like “ Just a reminder that your appointment is this Tuesday, March 21st, at 1:00. Please respond to confirm. On Fridays (or your last day of work) message those scheduled for Monday and Tuesday.

Back to your image: In addition to your appearance, phone etiquette, tone of voice, handling out-of-office questions, and confidentiality, you will be heavily “judged” during the first appointment. Their first appointment is where they decide if you know what you are doing!

Your client comes into your office. Is it clean and organized?

You introduce yourself, shake hands, make a positive comment or ask a casual question. Ask them if they had time to fill out the Client Assessment & Symptom Form. Yes. Excellent. Get their file folder which has their name on it and have them go back to your consulting area. No. Then get the papers, pen, and clipboard. “Have a seat here, I will have you fill it out while I (get some tea, get an order together...). **Make sure they sign the Consent form!**

Did you find something about them you could comment positively about to start small talk? Don’t rush them, they don’t know you. If they are reserved and not “talky” start looking at the Symptom Survey and look at their address. Have you lived here long? How did you hear about us? Look at the work and children questions? Where do you work? How old are your children? It is not just small talk, you are starting the process of understanding their life and lifestyle. Education starts right away. Tell them that where they work and where they grew up gives you some insight into the exposures and stresses they have had in their life.

Great Listeners...

- Do not think about how they are going to tell the client about their own personal experiences.

Example: Your client is describing their pregnancy and then you tell them all the details about your pregnancy. Instead of thinking about your experience, use the information to ask more questions about them - the goal is to have a very detailed view of their life to determine how to help them. Did you know that talking to them about their vacations and activities can uncover exposures that may have led to their health challenges?

- Do interact with a few personal things but not in great detail. Usually as a way to have the client give more details. Remember that you are determining exposures and root causes.

Example: Your client had a great vacation in Costa Rica but hasn't felt well since getting home. You could respond with: I loved (or would love) my trip to Costa Rica! When you were there did you swim in the ocean? Did you drink only bottled water? Did you have any stomach aches or digestive issues while on vacation? Any bug bites?

- Give eye contact and wait to write down a note or move the conversation until they finish a sentence.

There are many men and women who feel better when they are able to talk to someone they trust. As a natural health professional you will hear many heartbreaking stories and there are times when you will need to ask them if they have a pastor, friend, or counselor to talk to about a current or past situation. It isn't that we don't care or that we don't listen but we do need to recognize that they may need help we are unable to give.

In the beginning the conversations help us develop a relationship, understand their life style and stresses, hear about the activities that may have led to a health challenge, and much more but... we also need to make sure that we give sufficient time and attention to our task at hand which is to determine your action plan and the recommendations that will benefit our clients physical health. This means that we need to control the conversation. You need to turn the conversation around to their health challenges when it goes off course for too long - we don't need to know that their daughter is not getting along with her boyfriend. You can say something like: Relationships can be complicated, do you find it hard to fall asleep at night? Based on the answer you can go back to the symptoms or recommendations.



Seating! How could I forget this important detail. Having two comfy but supportive chairs arranged so you are sitting across from each other is important. You need to be close enough to talk face to face and to see their body language. You may also need to look at a rash, hand them a tissue, but mostly you need to be open (not hiding behind a desk). Sitting at a desk with your client across from you is a barrier to a relaxed conversation and feels more like a detached meeting.

As you go through the questions keep it light, which means that you do not have the attitude of "wow you are really messed up". When it is a very serious state of health of course you recognize that but not like the doctor with a no hope no "cure" learn to live with it attitude!

As an example, let's say a woman in her 40's comes to your office because she has been told she has rheumatoid arthritis (RA) and that there is no cure. She may be in your office because of the pain or because the pain meds have side effects and she is not comfortable with the risks.

You may offer: "RA is very serious but many people have found that even just changing the diet improved the inflammation. In addition, bacteria, parasites, and other organisms have been found to infect the soft tissue and cause the swelling around joints. Unfortunately, this is often missed or unrecognized as an issue. Do you remember when you first had the symptoms of pain and inflammation? Have you ever had food poisoning?"

In almost every case of a serious disease we must start with the bowels and the liver. This of course requires a change in the diet along with knocking down excess parasites/bacteria and while feeding/restoring the liver (which is feeding the whole body). Let your clients know that it is important to start at the ground level, and why of course.

"Did you know that the intestines are about 25 feet long! This is where all your nutrients from food are absorbed. If your intestines have inflammation from food or parasites, the herbs and supplements I give you will not be absorbed correctly. I have found that most people can't get well until the bowels and liver are first addressed so it is an important first step..... With 25 feet of intestines it may take 2-3 months. Do you get headaches or hay fever?"

If the bowels seem fairly good but the liver is not (gallbladder issues, prone to viruses, headaches, seasonal allergies, hot flashes, skin rashes...) let them know that you are going to do a light cleanse in the bowels to take care of any hidden issues but that the liver seems to need more attention. Let them know a few things about the liver. That it requires several nutrients to function correctly and some of the functions include fat digestion, controlling blood sugar, storing and converting vitamin D, detoxing all chemicals in our food, environment, and cell waste produced by our body. Did you know that a person can have a great tan all year and still be vitamin D deficient? A healthy liver is needed to activate and store vitamin D, unfortunately many people have subclinical liver issues.

Educating the client is very important. It is not just so they gain confidence in you, they also need to learn about their own body. It helps them stick to the plan because they know why they are taking what you give them and what they need to do to take control over their own health through diet. I should say diet and supplements because almost everyone needs additional support. We live in a very toxic world and it is impossible to avoid everything. Depleted and unbalanced soil has also led to great looking fruits and vegetables that are lacking in important nutrients. Many are also living a life that includes chronic stress, too much social media, and not enough outside time for grounding and relaxation.

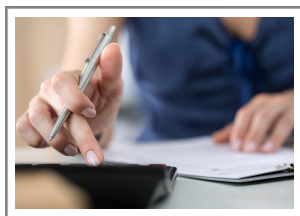
When you have determined what they will be taking for the next 6-12 weeks (before their next appointment) you will be filling out the recommendation form. Group the pills, herbs, and homeopathics together (don't list pill and herb then pill). Then explain the sheet to them. "You will taking this and this and this at both breakfast and supper. They will help remineralize, rebuild, help with inflammation.... You may put all the herbs together in a little water or juice. They do not taste good so don't put them in a large glass! The whole glass will taste bad, just use a shot of water so you can swallow fast and follow with the glass of water.

Many of the herbs, especially parasite formulas, taste awful. It helps to just say it and tell them how to make it less offensive. Tell them you will need to see them again and why. "I am going to have you reschedule for 6 weeks. It takes about 6 weeks to finish the parasite formula and the _____ homeopathic. While we are supporting many systems with this visit, we still need to get to the root cause of _____."

Remember to tell them that the doses may need to be changed. If you are working heavily in the bowels let them know that if there is a lot of cramping or things just don't feel right that it is not that the herbs are wrong, but they may need a smaller dose. Tell them to email/call if they have any problems or questions.

"If I am not working the best thing to do is cut the doses in half on _____, and _____ (put a star beside the name) but do let me know. I need to make a note on your folder that you are more sensitive. Most people do not have any issues because I use low doses to start with but if I don't tell you, you will be the one!"

When working with the liver the most common symptoms of needing a lower dose are headaches or body aches. Homeopaths can give a person the same symptoms from the past. This is a normal response but also indicates that you need to use the homeopathic once per day instead of 2-3 times. Dose is not always the problem. Make sure that you have given them a proper drainage formula and bowel/body support before encouraging the body to dump or eliminate toxins or excess organisms.



You have finished telling them how to take the items and why they are on the list. Now it is time to take the basket of supplements and the Recommendation form to the front desk. This is an area where it really helps to have an front office manager. She/he handles all the money which removes you from feeling bad about the often large bills the first few times and they don't feel like you just want there money.

If you are working alone, it is not improper to say that the first few visits are expensive. "I only buy from the best companies with quality control standards. I am working with many serious illnesses, the products have to work or it is a waste of time and money. The good news is that after we get through the main layers of dysfunction in your body we will not need as many products!"

While you are at the desk you need to make a copy of the Recommendation form for your file. Put the original in the bag with their products. An example of a Recommendation form is at the end of this manual.



"Your next appointment should be in 6 weeks, what days and times work best for you?" You may need to add: "It is best to schedule right away to make sure you get the day and time that works best. If it is not going to work just give us a call and we will reschedule." Give them a business card with their appointment information. It would also work to put the next appointment date on their Recommendation form - March 5th, Tuesday, 10:00 am. Remind them to call if they have any questions as you give them their bag.

Wash your hands immediately. Not just for your next client. You are likely going to get a drink, touch your face and hair... When your next client comes, if it is not immediately, wash your hands. Yes, they care and notice.

THE FRONT OFFICE MANAGER:

A front office manager? You are not hiring a receptionist or secretary. You are hiring a team member and should pay as much as possible to keep them if they are a great employee. If you think you are going to do everything yourself forever you are not planning on being a successful natural health professional!

When you start building your clientele you will simultaneously have phone calls and emails with questions, scheduling appointments, ordering products, getting products for clients when they stop in, mailing products to clients in other towns/states, taking payments, stocking shelves, making herbs... can you do this when you have a client in your office needing your attention? Do you interrupt your client's office visit to answer the phone or fill an order whenever someone stops in to get supplies? NO!

What Does A Front Office Manager Do:

This is most often the very first contact a potential client will have, whether it is in person or on the phone. They are the other person in your office that will know almost everything you know about the client as well as things you do not know. They are the one talking to your client when they stop in for supplies, taking messages to give you, answering emails that do not need your attention...

They are doing the purchase orders (you need to tell them what you need ordered) and know that you need to a couple more items to get free shipping or that the vendor/company has a special going on that month. They are filling the tinctures or reorders or making them while you are giving directions to your current client in the office. That is if they are not on the phone or taking care of something else!

They are managing your time! They are scheduling the appointments and putting out fires and taking messages and printing off emails for you to look at so you can determine if she/he an call or email the client with a simple answer or if you need to call or email. She/he is tactfully not letting clients interrupt you when you are with a client but still meeting their needs!

They receive the order into inventory and stock shelves when orders come into the office. They know every password and have to update the companies if you get a new credit card. I had my office manager make out her own check and all the checks for bills - I just signed them!

My manager came in a half hour before I did to do a quick clean from the evening before because I was often there past 5:00 when she left for the day. When I arrived she had the messages and emails from the the night/morning so I would know what I needed to take care of between clients or before lunch. She went to lunch before I did so someone was always in the office.

They need to have a lunch hour! While they are out they can go to the post office to mail the packages they have invoiced. They could stop by the bank and make a deposit. I paid my manager \$50 per month extra for gas.

They need an office policy/duty guide in advance so they know what you expect. Change it as necessary so you are both able to work as a team. Give them some freedom to take a day off so they can visit family on a long weekend or attend a school program. Treat them as a team member and keep them. Your clients need the consistency of a team not the attitude of an overwhelmed, under-appreciated, under-paid employee!

MANAGING YOUR TIME, YOUR LIFE

The first year is often slow enough that a person will work anytime their client wants to meet! Is that a good idea? NO, it is not a good idea. It will overwhelm you when you have 200 active folders/clients in your file cabinet. I say active because you will have clients that you just didn't connect with, moved away, got well and stop coming in, didn't get well after one bottle of herbs and decided it didn't work, started seeing someone else... do not take it personally! You will not be the best person for everyone and not everyone is willing to make the changes necessary to get well.

Burnout in this business is very real. When you first start you are so excited that you can't imagine it ever happening but... day after day with sick people who need a lot of attention and care and the calls and emails will add up. You will not be able to help them if you do not take care of yourself! They deserve the best you have and you deserve to be the best you can be.

As long as your clients know your schedule you may set any hours and days that you need. One of the things we "trained" our clients to do was emailing their orders or leaving a phone message with what they needed. My office manager, Brenda, would simply email back or leave a phone message saying that we had or would mail their package that day. If they were local she didn't respond back but would simply have it ready when they stopped in to pick it up. This was great for the client! When they arrived their supplies were in a bag and the invoice was ready. In and out and on with their day.



There are many little details in an office. Like what kind of bag? We ordered 2 sizes of white bags with handles. The larger would hold green drink size items and the smaller ones held 6-8 bottles of supplements. They were easy to carry, sat up on the counter, looked neat and clean, and they were not expensive. We ordered ours from papermart.com. Brenda would use a pencil and write their name on the bag so it was easy to pick out when the customer came in. Pencil because they often reused these bags for other things. Spending money on bags with your logo is not effective advertising.



Mailing supplements? We found that boxes were not needed unless mailing glass bottles or if it was a large order. We kept all the small boxes that came with our supplement orders and reused them! What we used 90% of the time was padded envelopes. To save money, we bought a huge box of medium and large envelopes (bulk envelopes were not expensive at places like papermart.com). The large envelopes would hold 4-6 bottles! The medium ones 1-3 items. We also had a box of bubble wrap for any glass herb and homeopathic bottles.

BEGINNING INVENTORY

This is an investment that has to be replaced all the time. The best way to build the inventory is by using your profits to purchase more items of the same (depending on how often needed) and by adding additional items for the inventory as you determine they will be needed. You must invest in your business, grow your business so you can have a long-term profit! Beginning profits should not be used for anything outside the business until you have gained ground.

Always work on a cash basis. If you used credit to start your inventory keep it as low as possible. Use some of the profit to pay off the credit but you must buy more of anything that leaves the shelf also so... first you order what went off the shelf and the rest of the money goes towards debt and expenses. So many people fail at business because they spend all the profits instead of growing the business so they can enjoy greater profits and stability later. Yes, you will use a credit card to order more inventory but you pay it off immediately. With online banking I paid off my credit card every week at first. As my clientele and income grew I paid it once a month. Sometimes my credit card bill was \$6,000.00 for one month and I only worked three days per week with an occasional Saturday for those traveling from out of state.

Yes, you can build a very busy business. I live in a small town in South Dakota. Many of my clients lived in other towns and states. Other states? After you see Amy and help her, she is going to tell her friends and family. Some of them live in other towns and states and will make an appointment for when they are in town. You will send refills by mail and will either see them in person for another visit or you will do a phone/email/video consultation and send more supplies. If you offer virtual meetings you will likely gain more client referrals when they live out of state.

Let's talk about inventory

The most cost effective and profitable way is to mix as many of your herbal combinations as possible. I don't recommend this for parasites and herbs that you do not use very often. There are many ineffective and over-simplified parasite formulas on the market and in literature. With so many different bacterial and parasite species it is best to have a well-rounded formula and in addition use a homeopathic at the same time. Favorite formulas may be found at the end of this manual. If there are herbs you don't use often it is best to order them as premade so they don't get old. **Example:** I didn't use many herbal formulas for kidney stones so I had a a premade formula from Energetix.

*Talk to your accountant about how to do end of year inventory - of course the empty bottles will be listed as non-inventory but you will have a sales item called Herbs 2oz with a set price. I sold the 2 oz for \$18.00 and 4 oz for \$35.00. The "Herbs" will show a negative inventory because you did not order them, you made them from the bulk herbs. The profit shows of course. What I did at the end of year for inventory was count the amount of bulk herb bottles and adjust the inventory and than reset the Herbs to zero for the year - I think! My accountant always told me what to do and then I would forget and ask again the next year! They are important. They are very important when you have to do end-of-year forms and taxes for an employee.

What are you going to put on the shelves? Homeopathics when combined with the use of herbs and other supportive supplements are absolutely necessary. I am not talking about classical homeopathy which takes years to perfect. I am talking about the use of specific homeopathic NOSODE formulas for use against organisms (viruses, bacteria, mycoplasma, parasites, candida/ yeast, fungus). There are also great drainage and acute condition homeopathics for when children have acute inflammation, fevers, or ear infections - I used MarcoPharm's AB, ABB, ABC formulas.

Professional Formulas and Des Bio made up the bulk of my homeopathic inventory. A few were Marco Pharma and Energetix. Every company will claim they have the best. My inventory evolved as I experienced consistent results and your inventory will change as you discover what has worked best.

I will call the other items supplements because they are usually vitamins/minerals, or a combination of herbs with other ingredients. The most important ones to start with, if you already have the herbs, are Calcium, Magnesium, Potassium, Iodine, Sulfur (Glucosamine, Chondroitin, MSM...) , Fish Oil, Probiotics, B-complex, Sublingual B-12, Vitamin D, Vitamin C, COQ10, Antioxidant Blends, Digestive enzymes, Systemic enzymes, and Multivitamins.

Favorite Companies:

PF = Professional Formulas (all bulk herbs, most of my homeopathics...)

Marco = Marco Pharma (concentrated, tested - many favorites here)

DesBio = Deseret Biologicals (not everything can be done with homeopathics!)

SF = Systemic Formulas (excellent formulas and quality control)

PL = Progressive Labs (limited great formulas but much better pricing for the ones that were great - I didn't use their herbal formulas)

Energetix (used the herbal formulas primarily)

Doctor's Research (whole food supplements)

When you are choosing individual herbs, think in categories and systems.

If you choose 30-50 individual herbs you will have an arsenal at your finger tips. Pair them with homeopathics, supplements needed in greater amounts than found in food, a change in diet, and it will not be necessary to carry every product from every company! I always used the pre-made kidney, bowel movement, and parasite formulas and used other herbs to boost them if necessary.

Alteratives	Lungs/Sinus
Drainage (lymphatics)	Heart
Adaptogens	Hormones
Nutritive	Liver & Digestive System
Anti-viral	Brain
Bacteria & Parasites	Nervous System
Immune System	Emotional/Stress
Endocrine System	Kidney

My favorite Alteratives

- Burdock: blood, skin issues, congestion anywhere in the body
- Poke Root: lymphatic system/glands, growths - slow and powerful, use 3-6 months
- Blue Flag (low doses - mix with other liver herbs): liver, gallbladder
- Barberry (gentle for children and elderly but effective for everyone, slower work but deeper over time when compared to Goldenseal): liver, blood, lymph, bowels, lungs
- Oregon Grape (berbine like goldenseal - affinity for skin): skin infections, blood, liver
- Goldenseal - (very astringent and drying, short-term use, not for children and weak elderly)
- Red Clover: lungs, skin conditions but works best when combined with other herbs
- Echinacea (mixed): lymphatic system/immune
- Plantain: kidney, bladder, or external poultice for infections
- Yellow dock: bowels, liver/blood builder, skin

Low iron is common with vegetarians, women having heavy periods, the elderly, those using antacids or have bowel issues/food intolerances/bowel inflammation/liver issues... A common symptom of low iron is exhaustion and out of breath symptoms. Yellow dock mixed with alfalfa, nettles, and dandelion will build the blood/iron. Marco Pharma's Malunggay formula is also iron rich and may be used as a whole food multivitamin/multi-mineral.

Primarily Nutritional

Alfalfa

Bladderwrack/Kelp

Nettles

Dandelion root and Dandelion leaf

Oats Milky Seed/Avena sativa/Oatstraw (stimulating, reviving, burn out recovery)

More Favorites!

Licorice

Milk Thistle/Silybum

Yellow dock

Schisandra

Lemon Balm

Valerian root

Passion flower

Roman Chamomile

St. John's Wort (excellent anti-viral and liver herb but make sure they are not on an antidepressant)

Withania/Ashwaganda

Panax (American Ginseng)

Chaste Tree/Vitex

Red Raspberry

Peppermint

Black Cohosh (not just hormones, nervine for pain/inflammation in men and women)

Cramp bark (muscles spasms and tightness, menstrual cramps)

Blessed Thistle

Hawthorn/Crataegus

Saw Palmetto (for women also!)

Prickly Ash (stimulant, warming, peripheral circulation, slower but better than cayenne)

Horse Chestnut (weak blood vessels)

Horsetail

Elderberry (with red clover and barberry you have an excellent sinus/lung formula for the young and elderly)

Eleuthero (used to be called Siberian Ginseng but it is not a true ginseng)

Astragalus

Astragalus complex (PF) - immune

Mushroom complex (PF) - immune

Thyme

Sage

Oregano

Pau D Arco

Cat's Claw (tincture only - hard to digest bark)

Yarrow

Elecampane

Mullein

CROSS FIRE: I almost always use an herbal formula with the homeopathic formula - both aimed at the same system or organism. I call it a Cross Fire.

Example: Core Artemisa Blend by Energetix and Bowel Pathogen Nosode by PF will take down a multitude of various parasites and bacteria.

Example: The homeopathic Mycosis Nosode by PR and an herbal blend of Pau D' Arco, Thyme, and Oregano (excellent for clearing fungus/yeast issues after you have cleared the path of excess bacteria and parasites).

!!!! Companies sometimes change the name or formula. It is not a homeopathic nosode unless the ingredient list contains the name of the organism (I.e. Borrelia, Mycoplasmas, etc.)

Homeopathic Nosodes - Primarily Bacteria (read the ingredients, do not go by disease names!)

Lyme Plus (wide range) (DesBio)

Rheumatoid Arthritis Nosode (wide range) (DesBio)

Bacteria Plus (wide range) (DesBio)

Borrelia Series (DesBio) - keep one around, more if Lyme is common in your area

Tick Pathogen Nosode (wide range) (PF)

Mycobacter/Mycoplasma (PF)

Homeopathic Nosodes - Primarily Parasites

Bowel Pathogen Nosode (wide range) (PF)

Parasites/Amoeba/Protozoan Nosode (PF)

Food Poisoning Detox (wide range) (PF)

Colo-Chord (amoeba/ parasites) (Energetix)

VER (liver is primary target) (DesBio)

Homeopathic Nosodes - Fungus/Mold/Candida

Toxic Fungi-Mold Nosode (PF)

Mycosis Nosode Drops (PF)

Mycocan-Chord (candida/fungus) (Energetix)

Homeopathic Nosodes - Viruses (involved in chronic diseases)

Virus Nosode Drops (PF)

Vaccinosis Nosode Drops (PF)

Childhood Immunizations Detox (PF)

Herpetic Nosode Formula (PF) - so many herpes viruses involved in chronic issues

EBV/CFS Plus (DesBio)

Virus Plus (common fatigue generating) (DesBio)

Homeopathic: Xenobiotic Detoxification

Food Additive Detox (PF)

Lawn and Garden Detox (PF) - pesticides, herbicides and more

Industriox (PF) - manufacturing...

Herbal Formulas: Parasites/Bacteria/Candida/Fungus

Core Artemisia Blend (parasites/bacteria) (Energetix)

Parasite Complex (parasites) (DesBio)

Para-A (parasites/bacteria) (Marco Pharma)

VRM1, VRM2, VRM3, and VRM4 (Systemic Formulas - use there directions!)

Core Pau d'Arco Blend (Candida/Fungus) (Energetix) or make own with Pau D Arco, Thyme, and Oregano

Herbal & Homeopathic (HO) Formulas for Blood/Lymph/Liver/Spleen/Kidneys
Always use a drainage formula (*) when working systemically with homeopathics or herbs.

Hoxsey-Like Formula 4 oz (blood/lymph/systemic) (PF) (*)
Scolopendrium (spleen/lymph) (Marco)
Core Goldenrod (complex kidney formula/cleansing/bladder) (Energetix)
Core Queen of the Meadow (kidneys/soothing/cleansing/bladder)
HO: Lymph Drainage (DesBio) (*)
HO: Systemic Drainage (DesBio) (*)
HO: Lymphonest #10 (Marco) (*)
HO: Drainage-Tone (lymph) (Energetix) (*)

Enzymes/Bowels

Lipo-Complex (Gall bladder replacement pill!/fat digestion) (PLabs)
Marcozyme (systemic enzymes/inflammation) (Marco)
Instesti-Cleanse (Marco)
Frangula #27 (parasite support/bloating/recovery) (Marco)
Core Condurango Blend (healing intestinal tissue/recovery) (Energetix)

Endocrine System

Tranquil Complex (PF)	Gt - Thyroid (Systemic)
Pituitary Complex (PF)	P and Ps - Pancreas (Systemic) - pancreas building/stimulating
Pure Thyro (PF)	Metapan (Marco) - sugar control
Enerdreen (adrenals/CFS) (Marco)	Several individual herbal choices!
Ga - Adrenals (Systemic)	
Gb - Pituitary (Systemic)	

Metals (always use with blood/lymph/kidney/liver support)

Cilantro tablets (Marco) - (need to use with herbs for kidney/liver support)
Nepro-Rella (Marco)
Viscum #3 (Marco)
Core Cilantro Blend (with liver/kidney support) (Energetix)
Cerebro PTC (Marco) - brain "detox" and support (any brain issues: foggy, dementia, MS)

Children Specific or for the very weak or old

T4 - fungus formula (Systemic)
T3 - bacterial formula (Systemic)
Kiddi Flora (Marco)
ABC - homeopathic for ear infections (Marco) pairs well with: Ear Drops (PLabs)
Nettles, Dandelion, Alfalfa, Bladderwrack (low dose), Elderberry, Chamomile, Ginger, Peppermint (low dose), Licorice (low dose), Lemon Balm, Barberry (not Goldenseal), Echinacea, Passion flower (low dose).

Final Note: Herbal and supplement companies offer webinars, seminars, and literature that describes the use and benefits of their products. They also have wonderful speakers covering a variety of subjects - FOR FREE. Most are excellent but do remember that marketing is a part of the education. I really wish there was a magical product that would do as much as promoted. Realistically we must also have a good diet, healthy mindset, and a lifestyle that promotes healing. A supplements cannot do all of the work!

NAME:

DATE:

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**Office Hours: 9:00am – 5:00pm
Tuesday, Wednesday, and Friday**

SPECIAL INSTRUCTIONS:

Drink at least six to eight 8-ounce glasses of water per day.

HO: Homeopathic formula: Whack the bottle 3-4 times against the palm of your hand and then put the recommended amount of drops under your tongue and hold for 30 seconds before swallowing. Do not eat, drink, or brush your teeth for at least 10 minutes before or after taking a dose. If you have more than one homeopathic wait 1 minutes in between them.

Liquid Herbs may be mixed together and added to any liquid (except hot) and they may be taken with food and other supplements.

Re-evaluation Date:

[illegible]