Introduction and Jen Malika's Background

Welcome back everybody. This has been a fantastic event. And, no guest is going to be more important than who we have right here before. Jen. Malika. First of all, she's a certified FTN practitioner.

She's a personal trainer. She's a master transformational coach. She's a business mentor for functional diagnostic nutritionist. Now, through her Holistic Health Boss Health coaching brand, she supports busy, health minded professionals in taking back control her health by giving the matches to the right lab tests and resources so they can find the missing pieces of their health puzzle and actually fix what's wrong and get back to feeling like themselves again.

And using over a decade of business and project management experience and training in functional diagnostic, nutrition and transformational coaching, she also guides business oriented health coaches on setting up solutions to create multiple six figure practices that allows them to heal hundreds of people or working less, taking care of themselves.

Now, if that sounds too good to be true, let me assure you that then Malik is one person who absolutely delivers on that. If your health coach, you're not making six figures.

This is the kind of person you want to talk to. This is the person you want to talk to. So Jenna, really appreciate you being here today. I'm so excited to be here.

And thank you so much for putting on such a wonderful summit and providing so many resources for, I think, the health coaches and health professionals that are out there that, have been looking for the type of information that you've been sharing with all the interviews.

So I'm excited to share some pearls with them today about, you know, how to really create a successful business and how to implement systems and automation so that, like I like you said, what I do is so they can work less, make more, and really enjoy life because what's the point of working so hard, if you don't ever get to enjoy the money or the life that you're creating, right?

You tell me about it. You know, I got a new rule, Jen. I'm going to say two hours a day, no matter what. I mean, it's a little hard right now, but. But, yeah, I'm spending more time outside, and I work hard, but I, you know, I make good money, but I.

I want to enjoy it, like you said. Otherwise, it's kind of useless. Exactly. And that's the same reason why I got in the health coaching read when I came across Functional Diagnostic Nutrition in your program and saw what I could learn and then do and realize I didn't have to be, you know, stuck in the corporate world working for other people.

I could create my own rules and my own freedom. That was really inspiring for me. And that's exactly what I've done. And that's what I try to enable others to do, is, you know, how do you run an efficient business that allows you to really have that freedom?

I love to travel, you know that. I love to travel all over the world, all the time. And so I want my business kind of running for me in order to do that.

And I need it to be organized and part of what I help health coaches and health professionals do is implement the systems to do that. Yeah. And isn't it appropriate that with the current crises, you know, in the country going on or the lockdown or, you know, sequestering in isolation that we're doing that we're in a perfect business, like you probably haven't skipped a beat because you already work from home, right?

Exactly. I actually enrolled a client, probably about an hour before we jumped on this call, consultation that I had with somebody on Tuesday enrolled in my $4,000 coaching program.

And I don't have to lift a finger when I enroll somebody. I'm here talking to you because I have that freedom and and structure in my business. And that's, you know, read one of the questions that I always ask people is, once you enroll a client, what's the very next thing that you should do?

So I'd love to hear what you think. The answer to that question is. What's the next thing they should do after they enroll? If well if they enroll with me the next thing you do is they get to get their lab test done and fill out my intake forms.

Getting the First Client Through Story and Referrals

But so I'm not sure if that's what you mean. Right. Well that's what the client has to do. But you as the practitioner, you as the person running the business, once you enroll a client, what's the very next thing that you should go out and do?

Go put the money in the bank. Clothes? Yes. The money should automatically be deposited in your bank. And most people, when I pose this question to them, they'll say kind of what your response was about the client is like, oh, well, I need to go send them an email.

I need to send them the client agreement. And the answer the and that is not what you should be doing because that is kind of a waste of your time when we can implement systems to do that stuff.

So I say that when you enroll a client, the very next thing that you should do is go out and get your next client and when we have systems in place and business structure going on, your business is set up the way that it should be.

You should be able to enroll a client and walk away and go focus again on your marketing or your projects or your sales or whatever it is that you're looking for or to do to to create a study, you know, income and foundation of revenue for your business.

If you enroll a client and then you're distracted with all of the things that you have to do right after that, then you're not going out and looking for that next client to create that steady stream of income, essentially.

And I just see so many health coaches and professionals kind of struggle with, with this piece of their business. They go get all these wonderful trainings in business and marketing, and they're kind of wondering, well, what does it actually look like?

Like what are the steps in the process? When I onboard a client, what are all the things that I need to be thinking of? And then when you actually write out that list of things, it can be really time consuming and your time is best spent either face to face with your clients, working with them, or out there putting your message out into the world so that you can continue to get new clients.

Yeah, okay, I get it. Now, this is a new, though, because we have here a chance to provide some leadership direction, guidance, and a lot of support for the newbie as well as the experienced practitioner experience people.

Usually when I talk to them, they want to know more about the science, the labs, the protocols, the thing. Like they've already got their business going.

Let's say there's an, someone who's changing from another career, or maybe they're just coming out of, you know, having raised kids and they want to do something purposeful with their life or, you know, just someone who's always wanted to be in the health coaching business.

What would you say to them in terms of, like, getting their first client? I mean, before you get your second one, you got to get your first one, right? So.

So what about that? Yeah. I love to give some guidance on this, because I think getting your first client is a lot easier than we think. And I'll just share my story about how I got my first clients as an example, because I think that we all have clients within our immediate network, within, you know, three degrees of separation potentially.

Right. And so most of us, you know, we have our own personal health story that we can share. And I say that your health story holds the secrets to actually marketing and getting your clients, because one of the things that's going to help you get clients is being able to have instant rapport with them.

And so rapport is essentially trust. If you're not really familiar with what rapport is, but being able to build instant trust with them. And one of the ways that we can do that is through sharing our story.

So I, suggest that new health coaches or health professionals go out there and they start sharing their personal health journey, how their trainings and how the work that they're doing has influenced their personal health and has helped them to get success.

You are your own testimonial. And what I found with this was as I got into this world and through the training with FBN, I started sharing with my friends and family what I was doing.

I came into the training as a personal trainer, wanting to break free of some of the limitations with personal training, like, you know, having to be in person with people.

There's kind of a ceiling when it comes to your pricing and, you know, having to be in a physical space as well. And so I started talking to my personal training clients about what it was that I was learning and doing, and I actually got my first couple of clients through there.

And then also I sent out an email to my entire list of friends and family. Once I decided that I was going to change careers and I let them know what it was that I was doing, this new training that I had done as a health coach.

And I it was very clear in there about what type of person I was able to help. What were some of the problems that people were experiencing and the solutions that I had for them.

And as a result of that email, you know, it's kind of funny. Read is, two of my first kind of clients was my step mom and my stepsister. Yeah. And they both paid me.

They would pay me $3,000 to be a client. So I didn't give them a family discount, like they didn't get it for free. They actually invested in my business because I shared my story with them, and they believed in the work that I was doing.

And so that first kind of couple of clients that I got through personal training, through just networking and referrals and through family and friends, then they started referring to me.

And when you can deliver, you know, exceptional customer service, when you're messaging is really clear, when you're organized, when you're confident in the work that you're doing, the referrals are really effortless.

They just come to you. You know, the client that I mentioned that I signed up actually an hour before our interview today, she's actually a sister of one of my other clients.

It's been referred over to me, and 95% of my business is referral based like that, which is the perfect kind of business. That's what makes it kind of stress free.

Now, I know that you do a lot of good writing, and you're good at digital marketing and these sorts of things. You can go out and do public talks because I've known you for years and I've seen you do it.

But, you know, not everyone's going to have that mindset at first. So, again, trying to break it down a bit. What are you considering when you're onboarding a client?

Are you like, you know, because there's like, please speak, please work with me, or there's like, yeah, I might work with you if you're lucky. You know, like, those are two extremes.

And I think there's probably somewhere in the middle that you have to share with us. Like what's the most important? A couple things that are. Yeah. So I think what is important is that you need to present yourself as being organized and confident.

That is the most important thing. If you are lacking confidence in yourself, if you're if you don't come off organized to that potential client, the chances of them trusting you are going to like, diminish drastically, right?

Like we've all of maybe you've experienced this. Like if you have a bad experience with a massage therapist or with a product that you purchase because there wasn't good customer service service, they weren't confident in what they were doing.

They are question you can pick up and feel it. They are questioning themselves. You're less likely to go back and invest in that person or to purchase with them initially.

Right? And again, I think this is where I see a lot of those new health coaches and even health professionals out there that come out of their trainings.

Professional Onboarding and Consultation Structure

And one of the things that holds them back from getting started is they just don't know what the next step is. They don't know what how to price themselves and how to, you know, be confident in their pricing for their services that they're offering.

And then what the what they have is fear they're after. Like, I if I enroll this client, what happens next? Like what do I do? And, you know, I think that one of my superpowers in a sense, is I'm just very process oriented.

Not a lot of healer types are have the process type of mindset that I do. So when I got started in my business, I really mapped out like, you know, back to that question of when do you enroll a client with everything that needs to happen there?

Moving forward is really mapping out every single step in that process. And then how, you know, are you able to follow through with every single step in the process in order to deliver that exceptional customer service?

Because when you can create an amazing customer experience, that's what helps to get the referrals for the next client. So really all you have to do is get one client.

And if you deliver exceptional customer service and deliver on your promise to that client, then you're going to easily get the second client. It becomes so, so much easier when you do it that way.

And we can take you know, I think Steve Jobs is a great example of this that I use all the time. I'm a huge like Apple user at Mac computers. I have, you know, iPads, iPhones.

And when and when I read Steve Jobs book, it really made sense to me that he, you know, people love his product because he controlled the user experience.

He wanted to, you know, be able to for people to be confident, for it to be user friendly, like easy to use kind of stuff. And as a result of that, they're one of the biggest, you know, brands out there in the world.

Right. And we we can even see that being duplicated in other areas like look at target. Target is another first class kind of service brand. It's very like predictable.

You can walk into a store and most of their stores are designed in the same way. So no matter what city you're in,

you know exactly where to go to find the product that you're looking for.

More Nordstrom is another favorite of mine. I love Nordstrom because I can order clothes from them online and if I don't like something I can easily return.

Process is so easy. It's a great customer experience. They have been known for their returns that they will. I think I've even heard that they've accepted returns of like a spare tire or something that wasn't even, you know, theirs.

But the the point is, is that the customer service is what really matters. And so getting your first client is about being really clear on who you want that first client to be.

Having confidence in yourself. And I think a lot of that confidence comes from knowing what your prices and your packages are going to look like. Knowing what you're going to be offering to the person when you talk to them, and then also having an understanding of what the next steps are so that you feel confident and that you know what you're doing, and then also so you can deliver on that service as well to, you know, it sounds like, you truly understand the difference between a, what I call a hobbyist and a professional.

You know, we probably have had this conversation a number of times where, you know, people love being in the health business. They just love helping other people.

And, you know, they they just want to do some good in the world. Look, we all want to do some good in the world, but the way you can do the most good in the world is by really being professional, using systems and being on time.

And don't try to do it out of the trunk of your car type of thing, you know? And I love what you said about Steve Jobs. You know, he he was known as a really nice person.

He was a really smart person, is very, very successful. So some of his stuff I think we can get and, you know, he was let go about the company. He was considered to be bad for business after a while.

And they, they they fired him, you know, and he's and it was devastating to him because that was his baby. And at the same time he said, look, I just got creative, you know, I got really creative.

I just started create create great and, come up with new stuff that was even better, you know? So it's a word to the wise that if you come up against, some adversity, you better just get creative.

You know? So, now, tell us more about this professionalism. Like, what should I get? I'm trying to bring it back to the beginning. You don't have any customers. You've got very few customer.

What's that onboarding experience supposed to feel like? You know, for the client and for the person delivering that? It's like, what should they feel when they're delivering that, client onboarding experience if it's going to be exceptional?

Yeah. So let's actually talk about I think the starting point comes from, you know, even the point where you it really starts from the beginning of where you schedule a consultation with them in the first place.

So being organized when you schedule that consultation is the beginning point of their experience. So when somebody finally musters up the courage or they get brave enough to ask you for help, and then you want to be able to provide a clear path for them.

So like in what I help people do is like they set up, you know, a form on their website that is asking a few, you know, questions, about that person before they've got to schedule the discovery call with them.

I call it a discovery calls a consultation, and then immediately after filling out that form, they get access to a calendar link where they can clearly see all the available appointment times.

They schedule an appointment, and then they get sent a confirmation email where they can add that to their calendar. And this all is going to help to ensure that the person is going to one, you know, show up for the call, but also it helps to ensure that they are having like a guided experience, right.

And helping with some of the languaging too, that you might be putting on that form. So on my website, for example, when they get to that page on my website to schedule a consultation with me, I'm letting them know what's going to happen in that consultation.

So I say, you know, during this 45 minutes, we're going to explore exactly what's going on with your body, what it is that you want with your health. And then, I will share some insights with you about what recommendations I have for you.

And we can talk about how I work and if we're a right fit for each other. I say the right fit part because I actually learned this from you. Read an hour in the course.

Is that we should be, you know, interviewing our clients just as much as that. They're interviewing us. And it is important to feel like you have a connection with somebody.

Like that's that rapport piece, right? And so then you have then you have the consultation with them. And in my Business Essentials program, we really talk about how do you structure the consultation in order to, you know, back to your question, kind of give them great customer service and at the same time, you know, how does the practitioner or the health coach want to feel on the other end?

And I want to feel at ease. I want to feel like I'm meeting the needs of the person that's on the phone. So when they come to us as you are, you know, say like there's usually three things that they are wondering is, you know, can you help me?

Have you helped others like me and what's wrong with me? Right. So we kind of want to address their concerns. Yeah, right. And so the way that I like to structure consultations, just as an example of how we deliver on this service and, and based on how I want to kind of feel is the health coach delivering it as well?

Is that first 15 minutes is really about, you know, information gathering. These people that are coming to us, they've been through the ringer, they've been through what we call an FDA and the cycle of trial and error.

They probably have lost a little bit of trust or faith in the traditional medical, system or even in the functional health system as well, too. And they just want somebody to listen to actually listen to them and understand what's going on with them.

So that first 10 to 15 minutes is where I really try to focus my attention and energy when talking with somebody. And then the next ten minutes we really talk about, well, what is it that they want to be experiencing instead?

And this is where some of that transfer emotional coaching component comes in, is this is how we build value and the services that we have to offer for them, because they will come to us and they'll say that their main complaint is weight loss or that they have eczema or skin issues.

And but we want to get to the deeper parts of that. And this is also what helps them feel heard. So I will ask them, you know, what would having that do for you?

And then they'll start to open up a little bit more and share more about how it would give them more confidence. It would change their life. And then I say, well, what's really important about that for you?

And then what it really boils down to is something related to joy and happiness and feeling like themselves. Again, oftentimes. And that's really the diamond in the rough.

Like that is what we want them to connect with. And that's part of building that rapport piece. And then the last

portion of the consultation, the last 10 to 15 minutes, is where I answer some of those other questions that they had.

So after understanding what it is that they want, I kind of circle back and connect the dots for them based on their health history. And where I think that I can help them, where some of their healing opportunities are.

And then from there we talk about what packages I have that are going to meet some of their needs. And so this goes back into like, we want to be organized and we want to be confident and clear on what it is that we're offering somebody.

It makes it easier for us to share the information. And also it makes it easier for them to make a decision if we are creating custom pricing and it's kind of like all over the place, or we're not clear about what the offer is, if it's disorganized at all, they're immediately going to put up a wall about investing, right? Yes.

So so you clearly communicate. And I find that, you know, when you build value in that kind of way, when you can clearly communicate, the client will typically say yes to one of those options.

And then I think it's really important to set expectations with clients. So once they say yes to explain to them what's going to happen next, great. Here's what's going to happen next.

We're going to do your your payment, which is going to initiate the shipping of the test kits to you. You're going to immediately get a welcome email that's going to have instructions for you to do the intake forms online.

Building Systems, Automation, and Workflow

Once I get all of your results back from your test, and then I'll be in contact with you, we can set up your results review session. And then from there, we'll set up your reoccurring coaching sessions to guide you through the process, to make the changes to build your health.

And so that's just an example again of of that customer service. And what it should look like from your first client all the way to your last client. Like that's how we should be delivering.

Yeah, I think so. One of the things is coming through for me, Jen, is, the consistency, you know, like, this is how you do it. You don't meet one person and you're doing work this way with that one, and then you work with another one this way it is really hard to get referrals because they they kind of have a sense that you're just winging it, you know, so you can't wing it in this business.

You have to have your packaging and your pricing and your, you know, your onboarding sessions. You got to know what questions you're going to ask, how you're going to interview and decide if number one can even help the person.

I mean, that should be the first consideration I would think is like, gee, can I really help this? Or are they some person I need to pass on to someone else if it's not your wheelhouse?

But you're very systems based, so how does one create a workflow like that? An efficient workflow? Well, there's a lot of different tools that you can use that are out there.

And I think the, you know, the first thing, in order to know what systems you need, you need to understand what it is that you're trying to achieve. And so this is where when I built my when I put my business systems in place, I really sat down and I mapped out like what are all of those steps in the process?

What are all the things that I need to be paying attention to to make sure that the client is getting great service? What are the things that are important to the client?

So, for example, one of kind of the bonuses that I include in my programs is when a client enrolls with me, they get

a, a welcome gift, it's a secret surprise it.

And like, they are so excited when they get this package in the mail. And it kind of instantly solidifies some of that rapport that we built already. And that welcome gift will include, you know, tools or resources that are going to help them along their health journey, like a supplement, organizer or things like that.

And so you really want to mount this out, you know, from point A to Z, like, what are all the things that need to happen? What do I want this to look like?

And then based upon that, you can start looking at different systems out there that are going to meet those needs for you. And, and I really expand upon that as well too, because there's more than just the client onboarding part of your business.

You think about your business. You also have, you know, marketing and sales. Right? So if we think about the customer journey from the beginning part, like you're out here on the internet, on Facebook, Instagram, you have a website.

And the whole point is to draw people into what we call your funnel. So get them onto your email list. You nurture them through your email marketing, and then you make offers through that offer an opportunity to schedule a consultation, and they eventually buy from you.

And then you have to deliver on the service. And so when you're looking at business systems, you want to look for something that's going to meet, all of those needs.

Because if you are working in multiple systems, like you're doing your email marketing over here, you're doing your sales and payments up over there, client management over here, that can also be very time consuming in your day.

So I'm very, attuned to efficiency. I'm the kind of person that wears my cast oil pack, sits in the sauna and meditates at the same time so I can kill three birds with one stone.

So, again, it's really looking at your your business on a bigger, vision level, you know, kind of zooming out and going, okay, what are I have this client management stuff that onboarding things.

Here's the map that I want, like, here's all the things that I want to have in that process. And then what else do I need in my business. And then you can start looking for systems and tools, that will help to facilitate all of those things for you.

So again, you can create efficiency. I love that you commented on, you know, like something that's duplicated. So you want to have a duplicate of process if you're creating custom programs and things like that for clients all the time, it's going to become time consuming.

It's not, duplicate, it's not predictable. And so that's going to suck up your time. So you really want to have like in business a marketing we call this like your signature system.

For your the way that you coach or you practice, it's really important. And, just understanding that. So once I mapped that out, I literally had like a word document where I connect the dots and I have a diagram of like, here's all the events.

And what then happen. And then I started looking at what are some systems, that are going to meet my needs. And then I selected one and started implementing building a process.

There. That now I get to share with other health coaches and practitioners too, which is fantastic to help them on the journey as well. So it sounds like you've kind of, automated things a little bit.

And, I know that's kind of your specialty because we've worked together a lot. And it helps to be to be organized. I wanted to just jump back for a quick second.

Say another thing you got to be consistent in is your pricing. And if you are building a referral based business, they know what you charge the other person.

So it's okay. Don't you know, like, you know, if you work for the other person for a thousand bucks, they're going to want it for a thousand. If you charge a person three, you're going to be ready to shell out.

Three, you know, a grant or five grand, like I assume your pay package is even higher than that because you are a professional and you have a system. And tell us about the the streamlining automation.

And you also like you just said you can, but it's like you have I try to keep it simple for people. So you've always going to have your sales and marketing or what you call promotion.

You're going to have to promote yourself if you work for yourself, you're going to promote yourself until you can hire other people to do it. It might turn out that although that you're always like the best promoter of yourself because you're excited and you know all your stuff, you know, so you get promotion time and then if you got well, you got to deliver your product, you got delivery or production or whatever you want to call it.

So and, you can get really with all the things not to mention accounting, you know, and you know, you're ordering, you're, you know, delivering on a lot of things.

So how do you keep that automated and, and lined up like good. Yeah. So I have a program called the Practitioners Business Management System that I've created as a result of this.

And it really started from me automating my personal business and then recognizing that there was a huge need for this, probably with other functional health coaches and practitioners.

And so there's a couple of different tools out there that have some of these capabilities. Active campaign or entrepreneur is one of them. You'll hear a lot of people, talking about practice better as another option as well.

And then there's also Infusionsoft, and I use Infusionsoft, to automate my business. And part of the reason why I use Infusionsoft, why selected that as a program, is because it does all of the things that we're talking about.

So most people know Infusionsoft as a business and, or a marketing and sales tool, they've never seen it used as a client management system. So it's really cool that Infusionsoft is it's highly customizable, and that's basically what we, what I've created in my visits that now I share with others is when somebody it's Infusionsoft collects the payment.

So when I enroll a client payment gets collected through Infusionsoft. There's order forms in there. The program will then recognize which, or Infusionsoft will recognize which program that person enrolled in.

So it sends them the specific welcome and instruction emails with the things that they need to know. And then the system is helping me to track and document what is being received back by the client, what intake forms have been completed, what lab tests have been done, and also when all of those things are turned in, the system will recognize that and it will automatically create a task for me to sit down and do my results analysis and put together my dress protocol.

And when I mark that task complete, it then automates emails to the client to book their results review session, and it recognizes when they do that, to move them forward again in their program.

And it helps me keep track of what session they're on. Like one of my larger packages has 21 sessions, which is a lot to keep track of. And Infusionsoft, I'm able to see exactly which session they're on at any point in time.

It's also where I log all of my client notes from our sessions or document anything in there. We can see all orders that the client has made, and because it is an email marketing system, all emails are sent through there.

Whether they're marketing emails or specifically for the client and their program. And you can see their history, their email history in the entire system.

Now, it took me six months to build this thing. Read. And then once we built it, it took us another six months or so to test it and kind of work out the kinks.

So that is kind of one of the benefits is that we have an already kind of templated system for people to use out there. Activecampaign and entrepreneur are both capable of doing a lot of these things.

But as I like to explain it, you know, it's a fixer upper home. So a lot of people watch HGTV and, you know, the term fixer upper and turnkey and fixer upper is basically you want to break the house.

You just want to keep, you know, the frame of the house, but you probably want to redo the whole entire thing. And that's kind of what you get with entrepreneur or something like Activecampaign is there's no structure already there for you.

It's like a blank slate and you have to learn, you have to create it yourself. And then you have something like practice better, which practice better does.

Some really great things on some of the client engagement side of your, your business, but it doesn't have your email marketing and it doesn't have a lot of, the other sales and marketing tools that you would need.

So then you end up working outside of that and other systems that don't actually connect and talk with each other, right? Yeah. So our system is what I call turnkey.

It is that home that has 90% of all the touches and finishes that you want. And we copy that in your system and into your Infusionsoft account. And then from there we take you through a process of putting the finishing touches on it, you know, personalizing and it making it your own painting the walls.

So we teach you to put your logos and your branding into the emails, and you kind of modify some of the email templates that come over for you. So then it becomes yours.

So it is a totally branded thing, which I like, because, you know, everyone's unique and wants to have their own, their own logo and identity and things at least the health coaching that we teach is mostly, entrepreneurs.

Matter of fact, this morning I gave a masterclass to the, holistic Entrepreneur Association. It was so much fun and so well received, you know, and, we're still spreading a lot of good education and, you know, vehicle for health coaching to become a just an amazingly professional, elevated profession.

It's not just, my health coach, you know, I can I can help you pick out some supplements if you want, you know, like, or something like that. We actually know how to find out which, you know, really wrong with the person if you want to put it that way, you know, what are the healing opportunities?

And then welcome to that journey. So, how many of you probably couldn't handle more than 4 or 5 clients the old fashioned way, you know, or you'd be maintaining an awful lot of paperwork.

But you. So you talked about this organization and automation, things like that. How do you translate that to, like referrals and retaining clients and things like that?

Because we all know how hard we work to get a client and we don't want them going away. So kind of help you with that too. And, and then how would it translate into. Yeah.

Yeah. So the engagement piece is really important. That's what we call like the post-purchase experience is how do you. So the client invested with you now and as we've been talking about is how do you deliver on that service and how do you engage them in a program.

So for, you know, us as FDA like myself, you know, there can be a period of time in between. We ship the test kits out and we actually get the results back.

So in the in my program, in the system, there are reminder emails that are going out every so often that are nudging the client to make sure that they're completing their test kits, that they're completing their intake forms, and it will continue to nudge them until we receive all those items.

So that's where it's not me sending an email like you, you're exactly right. If you're doing this stuff kind of manually and monitoring it manually, that would take up time in your day to do that.

So the system is doing that. You know, basically for us it's helping to nudge and encourage the client. And then the client actually really appreciates that, you know, they appreciate the reminders that they're getting.

So this is part of how we're building that really great. You know, customer service experience. Right. And then we do have there's other email reminders and ways to keep you organized.

Like I mentioned, the welcome gift. I also halfway through their program I do an encouragement gift as well. So the system is tracking when they get halfway through their program.

And it will create a task for my team to send out a, encouragement gift of some sort to that client, because I find that once I get to about session 6 or 7, they start to lose motivation because they're feeling really great and they forget how crappy crappy they used to feel.

And then the gift kind of re motivates them. Yeah, exactly. There's there's also milestones and benchmarks in there that remind me as the health coach to do reassessments with them using some of our intake forms that give us like a score so we can track and monitor their progress and give them feedback about where they are to in that health building process.

And so the clients find that super insightful. And again, it's all a part of being organized.

Retention, Referrals, and Client Engagement

There's at a certain point in their program, the system is automating a task or triggering me to do that next step with them. And so when their experience seeing that, they're like, wow, nobody's ever really paid this much attention to me.

And that is what is incentivizing or inspiring for them to create, you know, send us referrals. Right. And then actually at the end, towards the end of the program, it does automate, like a testimonial collection as well as a referral suggestion.

So once they get towards the end of the program, it will ask them to automatically submit a testimonial. And again, the system kind of reminds them to do that until they complete that task.

And then it will also let them know, you know, to kindly send in any referrals my way. And if they do send referrals, like here are some of the benefits that they can get from sending referrals over, such as getting more, you know, getting a free session.

So they continue doing this valuable work together where they get a free bottle of, like, you know, my favorite, one of my favorite supplements or whatever that might be.

So it's that referral pieces as well too. And then for those people that are running like group programs or bigger

types of courses and things like that, Infusionsoft itself has a whole affiliate marketing and referral system.

So I actually utilize that for when I run my cleanse challenges. There are some affiliates that I recruit, some of my colleagues, in the industry that help me to promote it.

And I'm able to get referrals from them using the referral tracking system. An affiliate set up this a few soft as well, and I can give them referral bonuses, for the work that they do also, which is cool.

Yeah. Jen, something just occurred to me because, you know, knows a lot about what you do, and I that's why you're here. We're joined again to provide the leadership and support for the whole health coaching industry.

That's why I put together all the top leaders in the industry and put them all in one program, you know, and we're some people say we're competitors. No, we're we call it coopetition.

We know that we want to make the pie bigger. Just make the pie bigger. I'll take a small piece of a big pie any day versus all of the little pie, you know, like, we, you know, so we just can't think that way.

And, so I love that you here. And and that's always been our our ambition is to get more, people to become health coaches. So for those that, you know, are sort of way behind you, so to speak, you know, like, they may they may know their stuff.

They could know other people know us, but, give us some little words of encouragement, because when people hear, Infusionsoft, they think when I first heard of it, it was called Confusion soft, you know?

So this just hit the nail on the head. Let's take the bull by the horns and and tell them that it's not, you know, not to hurt. It's it's definitely not so hard.

And here's the great thing about everything that I've been sharing with you guys today, you can still do manually. But as we, you know, mentioned, you may only be able to maintain that manual work up to a certain point.

You're probably going to hit a threshold with it, which is exactly where I got to as well. I had about 4 or 5 clients. I had an Excel tracking sheet where I was like, tracking where, you know, all the client things that we've talked about today, like, did emails get sent down, did test get sent out?

Did I schedule appointments with them? Where were they at in their program? So every single thing that we've talked about today is 100% doable on a manual basis.

If you're not ready for systems. And, and if you're looking to take it to the next level because you want to, like, hit the ground running, you want to be able to free up your time, then you look to invest in in something like Infusionsoft.

And to your point, yes, any system out there can be confusing, all of the systems out there that I've mentioned, whether it's Activecampaign, entrepreneur practice better, Infusionsoft, there's you'll see people talk about, Kaja or Kajabi, you know, all of them have their pros and cons, and there's some things about them that are user friendly and some things about them that are not, as I heard, somebody once say, it's the devil that, you know, that's the best one.

So they all have their quirks about them. And I remember experiencing this like years ago when I worked in corporate wellness, and we were using Constantcontact for email marketing to like clients at that point in time because all this online stuff was really new.

Yeah. And I just remember, like, cussing at that thing for, you know, all the time because the drag and drop builder or something about the email thing wasn't working.

And then we moved over to MailChimp because we thought that was going to be better. And we ran into similar but

different problems. They all have their little things about them.

But I think at the end of the day, read, what we want to keep in mind is that any successful like, substantial business out there runs office systems.

You know, everybody like there's a system behind any kind of successful business like what we can look at all different types of businesses. Like, I think that even, you know, I think about going and getting my oil change or when I schedule an appointment to get my oil change that they send me auto reminder messages on my phone, you know, so there's a system that's behind that.

They're using something that's that's doing that once they book. The appointment is an Infusionsoft. Maybe not, maybe something else. So, I just picked Infusionsoft because as I was mentioning earlier, it's a one stop shop.

It does all the things for you. And that was something that was important to me, was having everything in one location. And for, you know, the people out there that are real hesitant of something like that because it does seem it's a big, powerful system.

That's where we provide ongoing training and support for the people that are going through our program. It's not like we just dump it on you and say, see you later.

I think what's important is getting ongoing education and training about it. I think that with health coaches and health professionals, they tend to focus a lot more on the science, you know, the clinical aspects of their business, because the other stuff is, you know, a little bit scary, a little bit overwhelming.

But to have a successful business, you know, you are the CEO, you are the marketing executive, you are, you know, the content creator. You are all the things in the beginning.

And even when you get to the top, when you are the, you know, just the CEO and you have people working for you and you have systems in place, it still is important for you to basically, you know, at least on a surface level, understand what the systems are doing or what's running your business so that you can point out any blind spots or something that's going wrong.

So we do, as you know, true like entrepreneurs, like true business people. This is where we do need to invest a little bit of our time and understanding and money and these things in order to create the success that some of us want.

Definitely. Yeah, absolutely. You know, there's there's, such a thing as return on investment, and I've never known you to be shy to to to invest, you know, and I feel the same way, which raises the issue of money management because, you know, that's something some of us, I think I'm pretty good, even by the seat of my pants.

But when I started, when I had, say 100 students and we were using, like you said, Excel spreadsheet or something, and we're tracking them across as they completed something which changed the color code or check the box or whatever.

But when you have 3000 students, it's just stupid to do it that way, you know, and you're wasting money like crazy, you and I. But I think for the beginner, even what you said is imagine like you've got every all the ducks here in a row, your clients are all in there.

They're all automatically getting their email reminders. So automatically getting, you know, suggestions or requests for referrals or it might be, but you're also getting your reminders, you're getting tagged and it's saying, hey, today's the day you call this or you do that, or you send them a gift or, you know, to tell us you do, and that includes money.

But you said, if this is, of course, the money you know, I know you work through a third party for that because we use it and the money is there every now and then.

Then you see what's coming in. You can you can start to organize and maybe even pay yourself a paycheck. Imagine that. When I wrote myself my first paycheck, it was a long time ago.

That was I was, like, so happy. I don't even know if I cast it. I just you know, put it on the wall for a while. And so, I don't know, something like that, you know, but, but yeah, getting a regular paycheck is also really important in this business.

And I don't know any other way to do it, but to be really organized so that you and pay yourself first. First check the gets written, the read, you know, or to Jen or to you and then the bills.

It's just a bill like another bill. You can't do that if you're not a professional organized using a good system, automating as much as possible. And Jen, you really brought a lot to that.

You're so organized that when you said that you took you at three, but you said you you did a kestrel pack and took a sauna and something else. Three birds with one stone.

I bet you also meditate. I bet your dog was taken in apps. You're taking care of that bird, your husband's cooking dinner. So you take that stone to, you know, and there's probably two other things that were going on while you were getting, you know, sauna and Castrol packers.

So, yeah, I know you. So I know me pretty well. Read. Yep. And, so, you probably had given me something to do to, you know, I want to talk about, the last couple of things for Jen, and they're really important.

And it's about, again, this idea of leadership. And why would I invite a bunch of my so-called competitors to all talk about health coaching and offer their programs treated like there's no holds barred?

Everyone's going to get the links to everybody's, you know, website and contact and things like that. And so I want everyone to go ahead and purchase the program so you don't have to keep notes on every single speaker you can watch next week, you know, tomorrow's speaker or whatever it might be.

And, and on that, on that leadership thing. Besides you like, you know, you're, you're a great practitioner, but you also created this really neat program that other people can use to run their business, you know, then that makes the pie bigger.

That's why you're here. What else can we be doing to provide leadership in the area of health coaching? Do you think as professional leaders working together?

Yeah, I definitely think that the business piece is so important.

Vision, Leadership, and Professional Growth

So when I, you know, went through and started my business, I had invested in some additional marketing and business trainings, and there's not really a ton of stuff out there that is tailored to a health coach and specifically even to narrow it down from there, a functional health coach and the type of work that I specifically do, which as an FDA and running lab test.

So when I was even going through some of the sales and marketing trainings, I was having to take that and go, okay, how do I augment or evolve that to actually fit my business model fit?

Like what I do is as a health coach, and I think that that's where we see people like they go through some of these trainings where they're getting a ton of the science out there, but then they come out of the training and they kind of get stalled because they don't know what those next pieces are.

And, really, I think this whole client onboarding process is a big part of that, because I took some sales and marketing trainings, which helped me to kind of understand how to put packages together.

But then it was like, well, what happens next? Like, what does that workflow look like? What what does it look like through every single step of the client process?

And, I think that's where we could all get a little bit better. And I love to see, like, I know, you know, FDM is starting an internship program. I think Rita Marie has been on as a speaker, and she has an internship program for some of her practitioners.

And I do think that the internship programs are another area to really focus on, like because they're going to help the health coaches that are coming through, the practitioners that are coming through some of those trainings to actually apply what they've learned a little bit more and experience what it's like to work with the client.

So then they have that knowledge and they can go out and duplicate it in the world, and at the same time, when we're doing that, we can also service the public a little bit more too, because there's people that are coming, you know, out of all, you know, walks of life that are looking more for functional health coaches, health coaches and general health professionals.

And, it would be great for them to be able to go to a credible, reputable source like, let's just say, FDA, for example, and say, I'm looking for a health coach, you know, how can you help me?

And then we can, you know, they can go through an internship program and then that gets they get a solution. The health coaches get the experience, and then it's a win win for everybody coming out of that.

And and maybe even that helps those health coaches to actually get clients like they can renew the clients out of that process. Because that is the hardest, you know, hardest part, help them make some money initially so they can invest in building systems for their business and things like that.

Like I've done two. Yeah. Fantastic. I'm just going to ask you one more question. And, it's not a trick question. I mean, like that. In fact, we've been we've been talking about it.

But I want to tell the folks that, what Jen is talking about is pure gold and pure truth, because if you do it right, you'll have a customer pretty much for life.

You know, any if you handle them right and really deliver your product. And again, using all the modern tools and things, it's critical these days, especially since we work so far apart from each other.

People aren't coming in the office anymore not taking notes like this like I used to, but, this is the absolute truth. This week I got a LinkedIn message like, Will you be my LinkedIn buddy?

Whatever you call it? And I'm like, oh, I know, like I yeah, okay. Sure. And I did. And the first thing you said was, hey, I don't know if you remember me, but you helped me back in 2008, and now my wife needs help.

And so sure enough, I had him in my records. I can't give his name up, but, he's pretty famous author in the business, building world, and, and and I remembered his wife's name isn't that remote.

So he remembered me, and I look him up, I go, oh, yeah, you, you know, like he he had written a book in 2009. Was the last contact ahead with the guy, 2009.

That's 11 years ago. And when he needed somebody for his wife, guess who we called upon. You know, it's really remarkable when you do it right and how long those relationships can last customers for.

Like, here's the final question. It's we really cover a lot of that already. But again, I'm trying to separate the hobbyists from the professionals. What would be your number one tip or qualifying effect?

What separates the the pros from the, hobbyists? I think it's having a vision for your business. You know what is really sitting down and thinking about, what do I want to be doing?

What is this look like? And writing or journaling and out, you know, knowing and looking at all aspects of this. It's not just about like the business, like, you know, logistics, but it's also about what do you want as a person.

That was huge for me is as I shared a little bit earlier, was I was so tired of working in the corporate world, I wanted to get out of it. I had tried changing jobs a couple of times thinking that, you know, if I got out of fitness like when I was working in the fitness world, I knew that I had to get out of there because I would go out running in the morning, and when I would turn around to run home, I would start crying because I just was so stressed and kind of hated my job so much.

So then I got into corporate wellness, thinking that that was going to be better. And, worked in a place where it was really restrictive, like my mom got sick and they were not very, compassionate about about me needing to take off work.

And so then I changed to another corporate wellness job and ran into a lot of those same obstacles. So I think it's really important to visualize and write down what it is that you want to be experiencing in life, and then also, what do you want to be experiencing in your business and hang on to that vision?

I do a vision board, every year, and I journal fairly regularly about you know, my intentions and what I want in my life and in my business. And that is the guiding, like the Northstar all the time.

That leads me, you know, to the solutions or the opportunities. And I just think that that is so incredibly important. Like if you don't have a vision of where you're going, you're not going to go anywhere.

You're going to stay exactly where you are. Right? And as I mentioned earlier, like, you know, when it comes to systems, you need to know what you're trying to achieve in order to know what systems that you're going to need.

So you really have to have that vision for your business, no matter what it is that you're trying to accomplish. Well, so good. You said that, you know, because visiting is is everything.

And you might not think you're a visionary, but if you get out of your whatever zone you're in, like, yeah, everything's so busy and stuff like that, you got to get put yourself, put your, put your bare feet on a rock, like, or in the sand or in the dirt or weeds or grass or whatever, you know, and do that.

What you just said, paint the ideal scene in your head or you're never going to get there. So perfect. And thank you so much. Thank you for being here.

I want everybody to go out now and cash in your VIP pass. We're going to put all Jen's information in the show notes. You can reach out to her and all the other speakers too.

So, go for it. And Jen, you keep up the amazing work. Thank you. Thanks for having me read. Appreciate it.