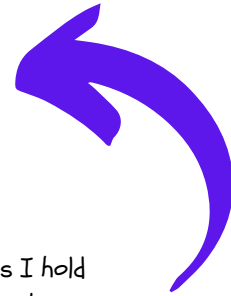


Joy-Filled Lingo



Marketing Foundations

The major platform pieces of my practice that make me strong and make my practice grow.

Celebrations

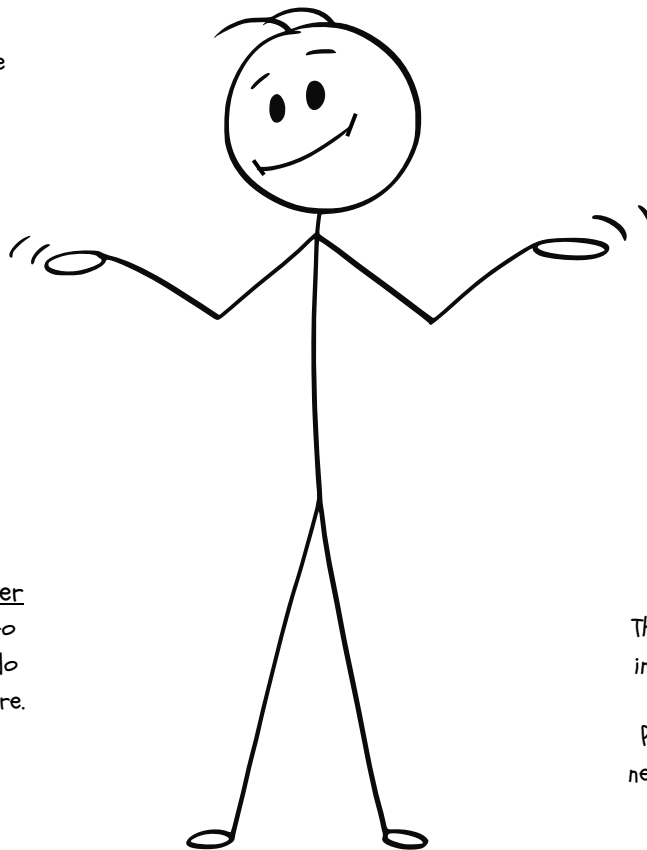
The parties and events I hold for my people to make it easy for them to refer to the practice, often while raising money for a charity I believe in.

Resources

The everyday tools and systems I lean on to make my marketing efforts really effective and simplified.

Celebration Kit

All of the tools I need to prepare and bring to each celebration.



The Practice Planner

Dr. Jodi's example of one year of marketing with all of the habits and celebrations weaved in. I can use it, or make my own.

Marketing Habits

Day-to-day systems I create and implement to ensure that my practice is growing and my people are happy.

Perfect Practice Member

The people who I love to serve, who get what I do and are ready for my care.

PALs

The people and businesses in my community who are also serving my Perfect Practice Members, who I need to develop supportive relationships with.

The Resource Kit

An editable version of the flyers and forms in this book, waiting for me to download and personalize.

The Workbook

A pen-to-paper inspired, year-long marketing plan guide.

Four Part Marketing Plan

The plan of action I am going to create from this book and implement to grow my practice, all with fun and joy.

How to use this book.

I often run into fans who pull my first book out of their bag; **STAFFLESS: FRONT DESK SOLUTIONS FOR SOLO-PRACTITIONERS** — and show me all of the markings and highlighting they have made, sharing their appreciation for me and my time. Listen — *nothing* makes us authors happier than to see our books well-loved.

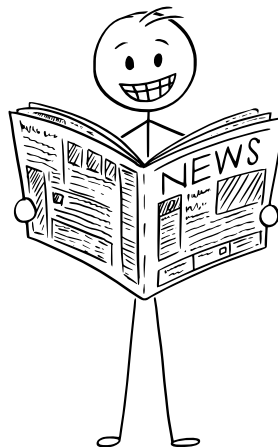
So go for it. Go grab a red pen and highlighter. There is a lot coming at you in this book. Put your gear in *drive*, and put your seat belt on!

The Joy-Filled Practice Plan is divvied up into four parts — foundations, habits, resources, and celebrations. Foundations are the building blocks from which your plan develops. *Habits* are the systems and procedures you practice on a regular basis to grow your plan. *Resources* are the tools that will support your plan. Finally, *celebrations* are the parties and events you offer to and for your community to realize your plan. See the next page for a breakdown of how each **Joy-Filled Practice Plan** offering is categorized.

When you see words in **BOLD** and *italics*, it means they are terms detailed in other sections of this book. Go back to the **Contents Section** for quick reference.

We have more for you. There are editable versions of MOST of our flyers and forms available at www.joyfilledpractice.com.

Enjoy the journey. After all, the journey is where the joy lives.



Joy-Filled Practice Plan

CATEGORIES

The celebrations and habits of the **Joy-Filled Practice Plan** are further categorized, for your reference, into INSIDE activity vs. OUTSIDE activity. One happens inside of your practice, supporting your current practice community. The latter happens outside of your practice, supporting not only the community at large, but also your future clients and community partnerships. See the following chart to reference which habits and celebrations are inside vs. outside. Some are in both categories, as they nurture all involved. The **bold** items are exclusive to their specific categories.

Inside Habits

Get Social

Practice Stats

Weekly Wellness Text Thread

Practice Member of the Month

Recall Initiative

Effort Tracer

Three Boxes

Outside Habits

Get Social

Weekly Wellness Text Thread

Effort Tracer

PALs Play

Inside Celebrations

Friends and Family Day

Envision It!

With Love...

Wellness Workshop

Kids' Month

Orange You Happy?!

Picture This!

Tag, You're It!

Well Planted

What's In Your Bag, Mama?

Outside Celebrations

Company Talks

Envision It!

With Love...

Help the Helpers

Wellness Workshop

Honey 2 Bee Networking

Orange You Happy?!

Tag, You're It!

Well Planted

What's In Your Bag, Mama?

See the **Four Part Marketing Map** for more on Inside/Outside Habits and Celebrations.

Closing

Okay, now you have it.

You have all of my tips, tricks, and hacks to create a practice that you truly enjoy, and that your practice members enjoy being part of. Ready to put it to use? With every treatment and every handshake and every celebration and every habit — may it all include joy. All of it.

As I said in the beginning of this book, you could have chosen any book, but you chose this one.

Not only did you choose it, but you got to this page. Whether you skipped over a big part of the middle of the book, or you read every single word, you still got to this page — to the end of my book and the end of the story of how to celebrate and nurture and nourish a practice...how to result in a joy-filled experience for all involved.

You now have a truly inspired, content-rich, how-to guide to find your people and celebrate them, honor them, and show them how you are the practice that does things differently. Yours is the practice that goes the extra mile, and does the extra things, and thinks of the extra touches.

Put into action all of the pieces that resonate with you, so that you can spread more love and joy to the people you serve. As a result, the people you serve can spread more love and joy to the people they serve. Use this book and the ideas it offers as a springboard to jump far and wide. Reach the next person, the next group, the next community, the next town, the next state — and keep going.

You have absolutely 100% got this. If you get lost, I will be right here waiting (along with thousands of other wellness practitioners from all over the world) to guide you and share with you and strategize with you.

Dr. Jodi
Dinnerman

Reach out to us.

It is my true joy to serve wellness practitioners seeking more JOY for their journey. Reach out, join in, let me show you the Joy-Filled Practice Way.

Free Facebook Community

www.facebook.com/groups/stafflesspractice

Instagram

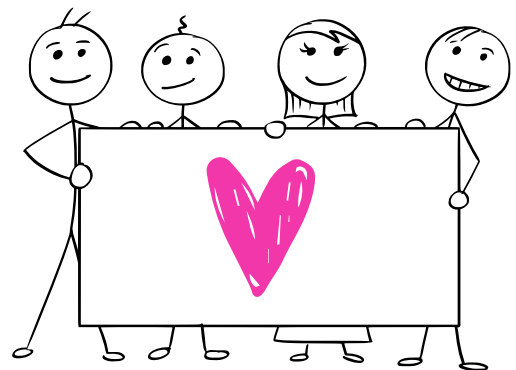
@stafflesspractice

Website

www.joyfilledpractice.com

Free Training

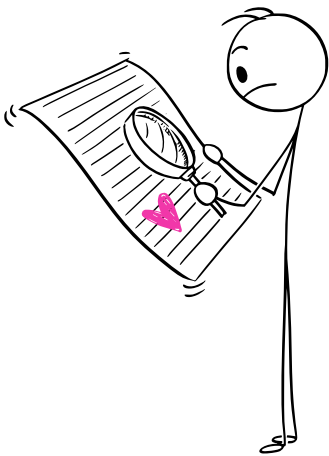
www.joyfilledpractice.com/free



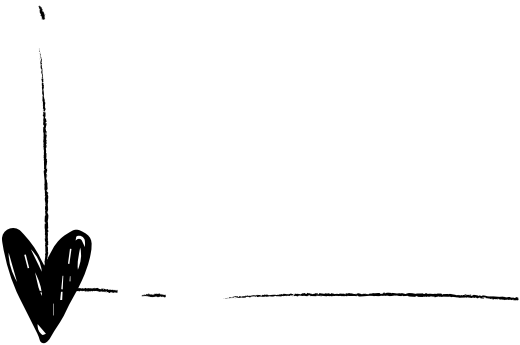
Typo Search

For every typo you find, and bring to our attention, we will gift you (as long as we agree it is a typo). And yes, we thank in style. Good stuff.

Please send each typo you find to www.joyfilledpractice.com/typos.



Take note.



1

Marketing Foundations

THE ESSENTIAL COMPONENTS TO A PRACTICE GROWTH PLAN

I take the time to create and nourish a solid foundation for my practice.

My habits are in place.

My schedule supports my vision.

My finances are in order.

I am of abundance and plenty.

*I'm prepared to succeed and I'm ready to embrace all that comes my way
with a deep knowing of what's mine and what's not mine.*

My foundation is solid and strong and fully supports me.

I am a Wellness Practitioner.

I practice in joy.

About **Marketing Foundations**

Foundations are the pieces you can't do without, the pieces that are essential to building a practice. Some of the foundations in this chapter will resonate with you, some won't. Pick your lot. Once you pick them, implement them, build from them. Plug them into your daily, weekly, and monthly plans.

See www.joyfilledpractice.com for editable versions of the forms included in this chapter. *The Joy-Filled Practice Plan Workbook* is also available for a deeper, pen-to-paper experience. For more on this topic, visit www.joyfilledpractice.com for workbook, workshop, and group support.

Marketing Foundations *Index*

CORE VALUES
 PRACTICE STATEMENT
 PERFECT PRACTICE MEMBER
 NATURAL PRACTICE GROWTH PROCESS
 APPOINTMENT TYPES
 FOUR PART MARKETING MAP
 FACT SHEET
 CREDENTIAL STATEMENT
 TAGLINE
 WANT MORE
 FUNNEL BASEBALL
 CREATE YOUR BRAND
 PRACTICE ALLIANCE LEADS/LOVES
 WEEKLY TOPICS
 CONTACT LIST
 FUNDRAISING
 PEOPLE, PLEASE
 MARKETING BUTTERFLY



Core Values

CORE VALUES DISCOVERY

Core Values are the key principles that drive your decision-making. A connection to your core values is a foundational component of a strong, successful practice. Once you realize the values that guide you, your decision-making processes for practice success will become that much easier.

Follow these steps to realize your core values:

- Choose from the list of words below. What are the key values that motivate your daily actions and thoughts? Circle the ones that resonate most with you.
- Walk away from the list for 10 minutes or so, come back to it, double-check your choices.
- Add any other values you feel connected to that are not already listed and/or circled.

Compassion	Excitement
Freedom	Creativity
Organization	Release
Abundance	Centeredness
Connection	Health
Authenticity	Independence
Honesty	Clarity
Power	Security
Strength	Fun

More to add?

Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

Practice Statement

Now that we are clear on our core values we can simply connect our values, with the right words, and develop our Practice Statement. A Practice Statement (aka Mission Statement) is a meaningful declaration of who we are, and why we do what we do.

This statement keeps us connected to what is most important to us — our values. We all need tools, we all need to stay connected. Things happen in practice, daily, to get distracted by. A connection to a strong Practice Statement can be extremely instrumental in keeping us on track and focused while practice building.

Here are a few simple steps to follow to discover your Practice Statement:

First:

Write out your core values

Then:

Write a short, clear sentence defining each core value in relation to your practice

Then:

Put the pen down, walk away for a bit

Then:

Upon return, reword any sentences that don't quite resonate with you

Then:

Marry your sentences together, in an order that makes sense to you, to form your Practice Statement

Sample Practice Statement

Through integrity and joy, we serve authentic chiropractic care to the families of our community; with fair pricing and great service.

Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

PERFECT

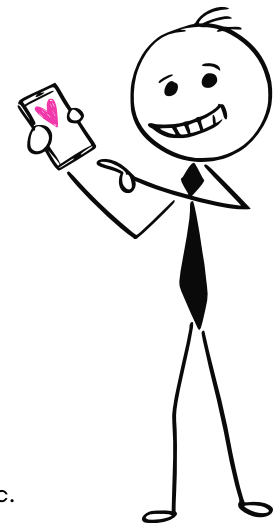
Practice Member

If you have a clear idea of who you want to serve, your marketing efforts will be that much smoother. You can't serve everyone, all of the time. Your schedule just won't permit it. So, best to focus in on who you *really* want to serve, who you are really good at serving, trained to serve, and how to cater to them.

Let's do it! Write out every single detail about your Perfect Practice Member. Even if it seems silly, write it. Who they are, where they shop, what they think about, what they love, what they can't stand, their colors and words and flavors, their hobbies and healers and merchants. All of it. The more you write, the clearer the picture becomes. The more you write, the more you get to know your Perfect Practice Member.

Once you have a clear picture of your Perfect Practice Member, you will know how to speak to them, where to find them, how to serve them, how to educate them, etc. Your marketing efforts will be laser-focused to reach them. Your messaging and writings and sharing will have more purpose and direction.

On the next page, fill in 100 qualities, interests, characteristics, passions, etc. of your Perfect Practice Member. Try (really hard) to not put the pen down until you fill every box. This exercise will provide detail and direction for the rest of the ideas and concepts of this book.



Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

Natural Practice

Growth Process

Your Natural Practice Growth Process (NPGP) is the process that naturally happens just by having a practice in existence. Over the years, people will get to know you, and your gifts. Naturally, the growth of your practice will increase. Naturally, people will come to know you as *the* person who does X, Y, and Z in your town. Naturally, your reputation will build.

Be clear. Crystal clear. You do *THIS*. You offer *THIS*. Then, you are the person to call, see, book an appointment with for *THIS*. Then, your NPGP takes off.

Let's use a Pediatric Chiropractor as an example -- Dr. Dawn. If Dr. Dawn is *not* clear about who she serves and what she does, as a Pediatric Chiropractor, her message will be muffled, and she will have random groups of people referred to her, looking for one thing but receiving another. Dr. Dawn will go in circles with her efforts in marketing, and burn-out will follow.

However, if Dr. Dawn effectively communicates her **Practice Statement** to her community, her community will know when to refer to her and when *her* specialty is THE choice for the client in need.

The clearer you are with your vision, the clearer you are with your messaging and branding, the stronger your NPGP will grow.

All of the activities included in the **Joy-Filled Practice Plan** are intended to clarify the who, what, where, when, and why of your practice vision and mission, in order to support your NPGP.



Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

Appointment Types

Now that your marketing plan is well on its way, it's time to hash out your Appointment Types. The following are some appointments to consider when planning for your practice.

Extended Visit

These are the visits outside of your regular client-care visits. They are special visits to establish goals, evaluate concerns, create care plans, etc.

Service for Donation

This is a service that you offer in exchange for a donation to a charity you are fundraising for. Be compliant; some areas have rules around what you are permitted to do with donations. Be transparent about the retail value of this service, the details it includes, any deadlines for participating, etc. This appointment is usually followed by a **Next Step Visit**.

Next Step Visit

This is the appointment that follows a **Service for Donation Visit**, as the next step to becoming a member of your practice. This visit is usually not discounted, and what you offer at a Next Step Visit is at your discretion.

Initial Consultation

This is your first visit(s) with your new clients. This is your time to evaluate, listen, study them, connect with them, and determine if you are the right person to serve them. Some practitioners offer their Initial Consultation in one visit, some in two or three — it really varies per discipline and what you want to accomplish during these visits.

Re-entry Visit

When your practice members come back to your practice for care, after being away from it for a specific amount of time, you may want to offer a Re-entry Visit. We often see Re-entry Visits rise in number with a successful recall program. See **Recall Initiative** for details.

Re-evaluation

Take the time, regularly, to make sure you are meeting the goals and expectations of the people you are serving. Study their initial paperwork, intake findings, etc. Make sure they are progressing and happy with your care.

Exit Visit

Some practitioners like to offer their practice members an extended appointment time to close out their care. If they have graduated a program, met their goals, etc. this appointment could be a great way to review and celebrate their accomplishments (and yours).

Four Part Marketing Map

When you want to explore new horizons you need direction, to know where you are going. What you need is a map! The Four Part Marketing Map is the perfect map for practice building success, providing the essential direction for practice growth.

THE FOUR DIRECTIONS OF YOUR MARKETING MAP

1

Inside Celebrations

The activities you offer in the office to celebrate, educate, and honor your current practice members, and provide them with the opportunity to share your practice with friends and family.

2

Outside Celebrations

The activities you participate in or offer to the community outside of your office – to grow your reputation and following as a wellness practitioner and community members.

3

Inside Habits

The regular processes and systems you keep up with inside the office to keep your practice successful.

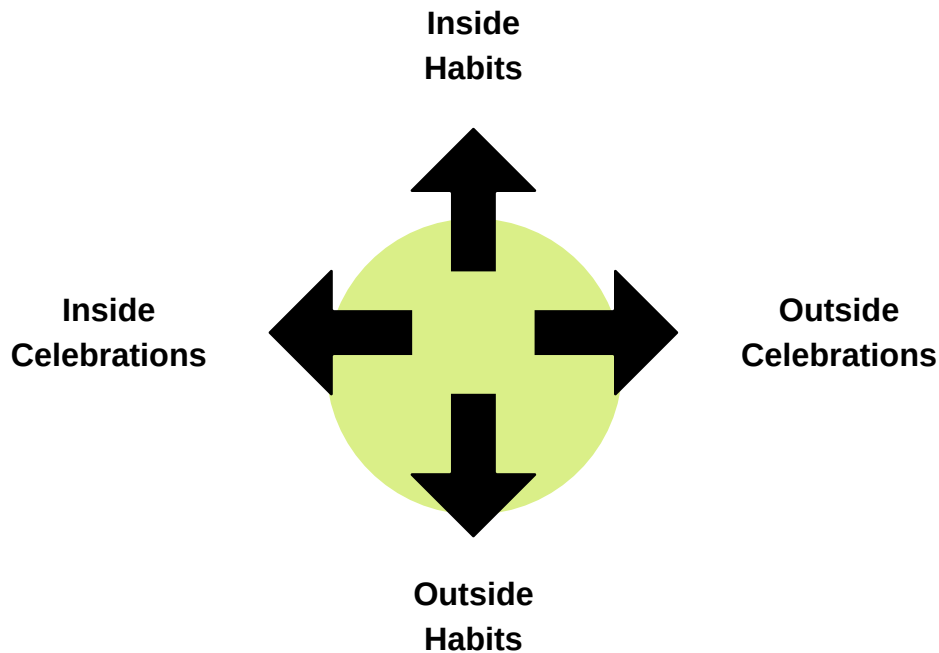
4

Outside Habits

The regular processes and systems you keep up with outside of the office to ensure practice growth.

See **Intro** for a categorized list of Inside/Outside Habits and Celebrations

Four Part *Marketing Map*



STAY BALANCED

When you are new in practice, with not many practice members to host events for, create systems for, etc., most of your directional focus will be on **Outside Celebrations** and **Outside Habits**.

As your practice grows, you will shift your directional focus to catering more inside the practice, with **Inside Celebrations** and **Inside Habits**.

If you are still growing, but have a nice, solid foundation — focus your energy somewhere in the middle.

If you follow your map, and take the necessary direction for practice growth, chances are you won't get lost. Create the map, follow the directions, and watch it grow.

Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

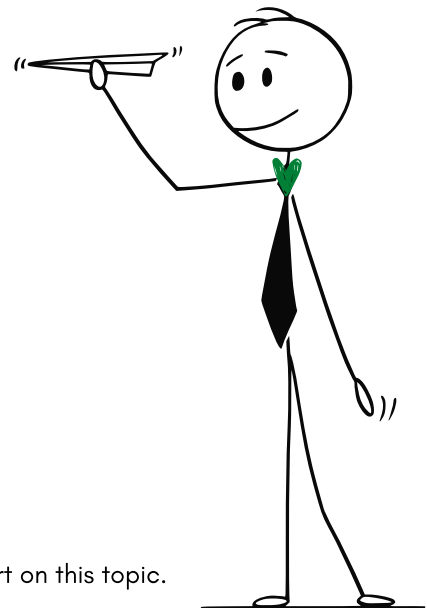
Fact Sheet

Your Fact Sheet serves as a quick reference to all things YOU! It's fun and personalized and gives the reader an organized overview of who you are, what your practice is all about, what makes you unique, your pertinent practice information, fun facts about you, and more.

Your Fact Sheet will be included in your **Goody Bags**, **Car Kits**, and **Ready, Set, Go Folders**.

Include on your Fact Sheet:

- Your practice name
- Your **Practice Statement**
- Your interests and hobbies
- Your website
- The best way for people to reach you (if you are staffless, think *texting*)
- Social Media handles



Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

Credential Statement

A Credential Statement is a list of all of your accomplishments, awards, and recognitions for your readers to know what your hard work and efforts have resulted in. Credential Statements are often requested to introduce you to an audience, when referenced on a website, or discussed in a professional forum. Your Credential Statement is a more formal document than the **Fact Sheet**, intended more for professional use.

Include the following in your Credential Statement:

- Any education certificates, degrees, or awards earned
- Community acknowledgments
- Memberships to state or national organizations
- Charity or volunteer work that you have been involved with
- Years in practice
- Practice location(s)
- A couple of personal facts about yourself
- You may want to include a few facts about your family and pets

Tagline

Your tagline will dress your signature with a bit of factual content. Taglines are a short string of words that follow your name, wherever it is signed, printed, etc. A Tagline provides your readers with a quick glimpse into who you are and what you're all about.

Discover your Tagline with these steps:

1. Write out a list of words that describe your work – ex: *healing, powerful, creative, gentle*
2. Choose three or four of these words that resonate with you
3. Join these words into a brief sentence to include with your signature

Example:

WORDS – Healing, fun, chiropractic, exciting, connected

TAGLINE – Healing can be fun with Smith Family Chiropractic

Use your Tagline everywhere! Include it in your email signature, on your website, with your logo, with your practice title, etc.

Want More

Your Want More is the clip you include at the end of your writings, videos, blog posts, video descriptions, etc. Provide your audience with direction to learn more about your services and offerings. Use hyperlinks and fun detail. Make it easy for them to navigate to the natural next step to connect with you and your offerings.

Answer the following questions to discover the content of your Want More:

- Where do you want to send your prospective clients to learn about your services?
- What recent writings or posts can you share with your readers, to provide an understanding of who you serve and how you serve them?
- What groups, pages, and/or clubs do you have to share with them?
- What can you offer them to get to the next step with your offerings?

Dr. Jodi's Want More

Want More?

1. *Grab my ULTIMATE TIME MANAGEMENT Solution!*

It's the perfect tool to make sure you're crushing it with scheduling. Not too much, not too little. You need to know how and when to spend time on what matters most.

Click [HERE](#).

2. *Join the Staffless Practice community. So good!*

It's my new Facebook Community packed with Wellness Practitioners, just like you, looking to earn more, serve more, and work less!

Click [HERE](#).

3. *Join SEWP School*

If you would like to work with me on doubling your practice without working more or having to hire staff, just reply to this message and put "SEWP School" in the subject line. (If you are already a SEWP Student, go to #4!)

4. *1:1 Support*

Feel like you need some 1:1 support to drill down on specific practice solutions, how to show up and unlock the strategies that are waiting for you? Go ahead and book a 1:1 [HERE](#)

Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

Funnel Baseball

Funnels give you the opportunity to establish trust with future clients (online) so that when they do make it to your office they already feel a sense of rapport with you. Your funnel will start simple, and perhaps grow with offers increasing in content/complication. Start with a giveaway; an article, top-ten list, interview, etc. Grow your funnel to a free training, podcast, etc. End your funnel with an offer to experience your product/program.

Funnel Baseball is a fun way to create a funnel with ease and simplicity.

The layout of the field:

First base: the first step of your funnel

Second base: the second step of your funnel

Third base: the last step to bring your client to your main service

Home plate: your clients have arrived and are ready for your care

You are the pitcher

Your future clients are up at-bat

CREATE YOUR FUNNEL

First, we figure out what you are offering your clients, to ensure a home run. The goal with your offerings is to educate them, show them what you know (not too much) to position yourself as an expert, while providing valuable information.

- 1 Write out the different stages of your funnel. Start with first base, then second, then third, and end at home with the result you want to create. You can do this exercise for each funnel you want to create.
- 2 Plan out each phase then share with a teammate or colleague to review.

Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

Create Your Brand

Your brand ensures that your personality and unique ways are splashed all over your online and printed communications. From the colors you choose, to the fonts that you select – all in effort to reach through the perspective media source and grab the attention of your audience.

Create a Brand Kit to include your logo, colors, fonts, and graphics. Choose images, colors, words, etc. that will be used over and over, that you feel will connect your practice resources with your message. There are many online programs available for creative play with colors and fonts. Discover the one that works best for you.

The components of your Brand Kit will include:

Practice Logo

You want your logo sized right, not too big or complicated, just enough to tastefully represent your practice. Keep it simple, lovely, gentle, inviting, etc. Keep in mind that many print programs charge per color for the project that you are printing. Keep this in mind while designing.

Fonts

Create a font theme to work with for all of your marketing pieces. Choose one dressed-up font for titles and headlines, one bold font for subtitles, and one simple, easy-to-read font for text body.

Colors

The colors of your brand should make you smile. You will use color in your logo, titles, images, exclamations, and more. When you find your colors, capture their Hex Color Codes (special computer code for colors) and keep them handy for quick matching when working on projects. Check out the apps that you can add to most computers to match your Hex Color Codes when creating with color. Do the research on what you need to implement available tools for brand prevalence.

INCLUDE IN YOUR KIT:

Fancy font for titles

Bold font for subtitles

easy-to-read font for body

Colors that make you smile

Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

Practice Alliance

Leads/Loves 

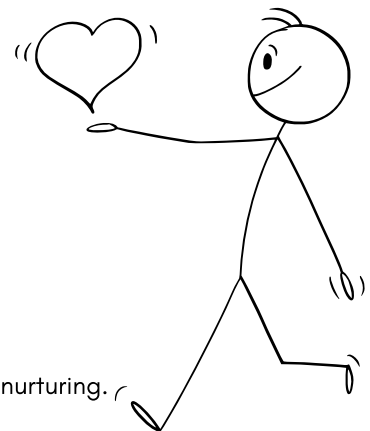
Practice Alliance Leads/Loves (PALs) are your community leaders, healers, merchants, practitioners, etc., who are already serving, catering to, and working with your **Perfect Practice Members**. These are the people and businesses that you want to create long-lasting referral relationships with, to support each other's growth efforts.

Having the right people on your side, cheering for your practice to succeed is key. Be selective. Align yourself with people in the community who are doing good things, offering great services, and solid in their approach.

Discovery of your PALs is quite simple. Start with answering some questions about your **Perfect Practice Members**. Your answers will birth an extensive list of your potential PALs.

Your list will naturally continue to grow. You will hear the same names over and over — of practitioners and businesses in your community who are serving your people. Keep a list of these names, get their contact information, and reach out to them. Invite them to coffee, a practice event, etc.

Your PALs will become your go-to people to grow with, serve the community with, refer to, support, etc.



Reference **PALs Play** in **Practice Habits** for a regular weekly action plan for PALs nurturing.

Practice Alliance

Leads/Loves

PALs DISCOVERY

Discovery of your PALs can be broken down into a two-part process.

PART 1: answer some questions about your ideal clients

PART 2: write out your top 10 PALs to reach out to

Part 1

Answer these questions - to drum up a list of potential PALs

- Where do your Perfect Practice Members shop?
- What practitioners do they frequent?
- What clubs or organizations are they members of?
- Where do your Perfect Practice Members eat out on date nights? With the family?
- Where do they practice their faith? Meditation? Yoga?
- What groups are their kids' members of? Their spouses?

Part 2

List out ten potential PALs to reach out to based on your answers above.

1

6

2

7

3

8

4

9

5

10

Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

Weekly Topics

A list of weekly topics will provide themes, ideas, and organization for your marketing efforts. Create an abundant list to lean on for your writing, interviews, texting, posting, etc. so that you can plan ahead for practice growth!

Start with a few months of weekly topics to accomplish the following:

- Guide your marketing plan themes
- Create content focus for live videos, Social Media posts, blog entries, etc.
- Create topics for discussion around the office (add to a waiting room whiteboard)
- Create newsletter themes

Take a few moments to review the details of your **Perfect Practice Members** (see **Perfect Practice Members**). Come up with three months of weekly topics that will peek their interests.

Here are some questions to ask when creating your weekly topics list:

- What are your Perfect Practice Members wanting to learn more about?
- What are their problems that you could offer solutions to?
- What do they think about? Talk about?
- What would pique their interest to see a post about? A blog entry about?

Visit www.joyfilledpractice.com for workbook, workshop, and group support on this topic.

Contact List

Your Contact List will be one of the greatest commodities of your practice. All of the people you connect with through all of your marketing efforts should be added to it. Collect the relevant information to keep up with them – keeping them informed about practice celebrations, milestones, practice changes, etc. Send them juicy content regularly. All of your marketing celebrations, meetings, and Social Media efforts are opportunities to grow your list.

Keep these pointers in mind when growing your list:

- If you are in a busy meeting and you want to collect someone's number, hand them your phone, have them dial their number on it
- Offer freebies on Social Media in exchange for contact information
- Place a pop-up form filler on your website to collect contact information in exchange for a fun freebie
- Collect business cards at events – challenge yourself to collect a certain amount by the end of the event, add the contacts to your Contact List

Always get permission before adding somebody to any of your lists (most of the current programs send a request for permission to add them). Contact information is a gift, don't take advantage of it, share it without permission or contact too often.

You will see that most of the celebration Weekly Lists include adding to your Contact List once your event is over.

Weekly Wellness Text Thread, blogs, newsletters, and practice celebration announcements are a few examples of when you will put your Contact List to use.

Fundraising

There will be many opportunities for fundraising as your marketing plans develop. Fundraising for a local charity is a great way to showcase your practice as a generous community business while doing good for an organization you believe in.

Pick a Favorite

It's great to have a few local charities to fundraise for, but it is suggested to have a *favorite*. As you develop a relationship with a *favorite*, you will get to know their team and how to work best with them, and they will get to know you and the gifts you offer. Choose a charity that your **Perfect Practice Members** want to support, as you are going to be connecting them frequently. Consider selecting a *favorite charity* that has team members willing to attend your celebrations and help out. You may even find a charity that will help get the word out about your celebrations.

Nurture Your Charity

If you follow the suggestions in this book you will be implementing **Service for Donation Visits** in your marketing plan. These visits offer a specific service in exchange for a donation to the charity you are supporting. There is a lot of opportunity here, and it needs to be handled properly. Have regularly scheduled meetings with your *favorite charity* to stay connected to them, ensuring successful ventures.

Be Selective

When selecting your *favorite charity* consider these things:

- Does your Perfect Practice Member feel passionate about this specific charity, too?
- Does the charity's mission align with your Practice Statement?
- Does the charity have a local chapter with members and volunteers able to get involved with your efforts in the community?
- Does the charity hold a raffle license? When you are offering celebrations that include a raffle, can you use their license to stay compliant (if needed)?
- Is the charity willing to help you get the word out about your celebrations? How much help are they willing to offer?
- How active is the local chapter of your charity? Is it a chapter that gets together regularly and offers community events, or is it a chapter that has gone stale?
- Have you studied the reputation of the local chapter? What do people say about it?
- Does the local chapter have a strong Social Media presence?

The end goal here is to find a *favorite charity* that really resonates with you, that you have a great rapport with, and that will support you and your efforts as you support theirs.

People, please! 

Nothing beats the ability to ask for good help, at the right time. Nothing. Especially if you are running a practice without staff. And, as you get more and more involved with community celebrations, you are going to need help!

RELATIONSHIPS TO DISCOVER

Marketing Butterfly

This is your marketing right-hand! They will hang flyers, help with events, reach out to your PALs, etc. You want someone who is fun, charismatic, represents your practice with a spring in their step, and sings your practice tune effectively.

Host(ess) with the Mostest

These are the people and/or businesses who provide a space (sometimes an audience too) for the celebrations you offer. You want to ensure they are easy to work with and share your practice vision (at least for the celebration), and have optimal space for your audience. See **Host(ess) with the Mostest** for more details.

Practice Member Enthusiast

You will have a handful of practice members who are natural cheerleaders for your practice. There is one in every bunch, and it is imperative that you nurture them and their enthusiasm. These are the practice members who share your name everywhere they go. Lean on them for your celebrations. Have them be a spokesperson for the practice and how effective your care can be. Thank them for their enthusiasm in meaningful ways.

Ask your practice members who love sharing to come to your celebrations like **Wellness Workshop** and **Envision It!**, to share a few words about your care and their experience with your practice.

Extra Set of Hands

You may need an extra set of hands around the office to help with set-up and clean-up for events, help with clerical duties (filing, flyer hanging). Be sure that this person is dependable and trustworthy, and you are in fair exchange with them.

People, please!

Practice Alliance Leads → Practice Alliance Loves

Your PALs are the community business owners, leaders, and practitioners who are already serving your **Perfect Practice Members**. You will grow with them, network with them, and offer celebrations with them to your community. You want to make sure the relationships are reciprocal and serve your practice well.

Perfect Practice Member

These are your ideal clients, the current and future people in your community that you LOVE to serve. They are the people you will speak to through your marketing efforts. See **Perfect Practice Member** to discover them.

Professional Cleaning Contact

From time to time you are going to offer celebrations in the homes of your practice members (or the office of your PALs). As a gift of thanks, you can offer to get their space professionally cleaned. Have a great cleaning service on hand. Consider finding one who uses healthy-living products. Make sure they are kind, compliant, and insured. See **Host(ess) with the Mostest** for details.

Professional Massage Therapist

Offering a massage as a thank you to the host(ess) of your celebrations is a great idea, too. Find a Massage Therapist who has a great reputation, is supportive of your practice and will successfully collaborate with you.

OTHER HELP TO CONSIDER

As your practice grows, you may want to consider hiring some team members. Here are some common roles for wellness practices to thrive with:

- Virtual Assistant - takes care of admin needs remotely
- In-house Assistant - takes care of admin needs at the office
- Marketing Assistant - supports with creating flyers, coordinating events, connecting with PALs, etc.
- Social Media Assistant - manages the practice's Social Media channels and conversations on Social Media
- Practice Member Advocate - handles practice member relations - serves as their initial point of contact, manages your **Recall Initiative**
- Personal Assistant - helps at home, with kids, running errands, etc.
- Financial Coordinator - handles practice bookkeeping, stats upkeep, banking, client accounting, etc.

Marketing Butterfly

Your Marketing Butterfly plays a very important role in your practice marketing picture — serving as your right-hand for marketing plan execution. They will often be the first point of contact for your practice out in the community, representing your practice brand and mission.

Some Marketing Butterfly responsibilities to consider:

- Posting flyers around town
- Writing and submitting press releases for events, milestones, and celebrations
- Managing your Social Media posting
- Checking emails for practice building opportunities
- Responding to emails for practice building opportunities
- Dropping off **Car Kits** to potential PALs
- Ordering supplies for **Goody Bags** and assembling them
- Managing **Celebration Board**
- Managing practice celebrations, **Celebration Kits**, etc.
- Essentially being your right hand for all practice-building efforts



Marketing Butterflies are often people you trade/barter with. Be compliant with your exchange with them, only do what you are permitted to by law (some areas do not permit bartering for healthcare)! If you are ready to take on a Marketing Assistant, see our **Marketing Assistant Checklist** to learn more.

Be sure to have clear expectations with your Marketing Butterfly. Have a written agreement regarding exchange, time, office policy, etc. Give them plenty of direction on how to speak about your practice, what to say when describing your work, and what new practice members need to know when starting your care. The more you educate your Butterfly, the farther their wings will take them!

COMPARE YOUR PEOPLE

Marketing Butterfly - usually bartered position, light duties

Marketing Assistant - paid for position, more responsibility and consistency

Practice Member Enthusiast - cheerleader for celebrations and events - no exchange