Business Planning Checklist for Wellness Coaches
Integration of services into a clinical setting

The following was designed to provide a starting point for those desiring to integrate credible wellness coaching in with another clinical or related practice. It is not intended to be comprehensive, but will provide the user with much of what will be needed to submit a proposal to a potential partner in this area. Be sure to review any legal or licensure requirements, as those are not addressed within this document.

Abstract/Summary: The integration of wellness into an established clinical or related practice provides an opportunity to enhance the trio of results, relevance and revenue simultaneously with a minimal investment of both time and resources.

Defining Wellness Integration in Our Context: Clinicians ranging from Physical Therapists to Chiropractors to Physicians and many others have always incorporated wellness into their practices. At the core, they are wellness providers. The concept presented here is to expand beyond standard care and integrate wellness coaching into and around the current clinical practice, addressing the wide range of needs among our patients and our communities in areas ranging from nutrition and weight management to life balance, stress management and more. This will allow for the enhancement of outcomes and overall experience of current patients, expand the pipeline for future patients, further build the reputation with referral sources, employers and the community, and provide a potential additional revenue stream for the organization. Some of these same concepts may also be applicable to partnering with organizations such as Yoga or Pilates Studios, Fitness Centers and other related settings.

Conservative Revenue Estimates:

- Revenue related to the effective integration of wellness coaching includes but is not limited to the following:
  - Direct revenue (see below for examples) tied to individual wellness coaching services
  - Partner with Occupational Health groups to offer employee wellness services
  - Offer employee wellness services directly as an extension of current offerings
  - Enhanced community reputation for facility

- Direct Revenue (for individual coaching on a cash-paying basis) - Based on variable costs of $49/month + $5/client/month for Coach and Client web portal tools and resources. Your own
revenue (or salary if not pursuing independently) is not included here, so important to take into account when putting together proposal. The $50-65/month example rates are used only to provide a conservative example. With the right combination of services and frequency of coaching, this rate could vary considerably (samples of $75, $100 and $150/month also provided).

- 25 Clients at rate of $50/month
  - $12,912/year plus benefits noted above (referral sources, outcomes, etc)
- 25 Clients at rate of $65/month
  - $17,412/year plus benefits noted above
- 50 Clients at rate of $65/month
  - $35,412/year plus benefits noted above
- 50 Clients at a rate of $75/month
  - $41,412/year plus benefits noted above
- 50 Clients at a rate of $100/month
  - $56,412/year plus benefits noted above
- 50 Clients at a rate of $150/month
  - $86,412/year plus benefits noted above

**Proposed Investment:** Initial costs for implementation beyond any potential liability insurance adjustments, marketing expenses and salary include the following. Note – as an independent practitioner, you’ll likely invest these figures up front rather than incorporating into the cost to the facility. However, keep in mind expenses such as these when designing your proposal.

- Coaching Certification -- $1,695
- Travel expenses (single trip involved – all else virtual) -- $750
- Web portal set-up -- $99
- Monthly web portal investment -- $49/month + $5/client

**Planning**

**30 Day Action Plan:**

- Lay out schedule to complete the CWC certification process
- Finalize partnership agreement with facility
- Share 120 Day Action Plan with facility team and begin brainstorming about initial ways to begin marketing the new program.
- Begin developing fliers/signage/etc. tied to the above for immediate use upon launch
90 - 120 Day Action Plan:

- Potentially entering final month of CWC certification process if not already complete
- Identify pricing structure for clients
  - We recommend 3 tiers of rates, built around expanded services or interaction with the coach at each tier. In a clinic setting, you may also consider offering packages of coaching that combine both face-to-face and telephonic coaching in your various models and identified price points.
  - Note – it is much easier to provide discounts off of standard (higher) rates initially than it is to later increase your standard rates. Be careful about starting too low.
- Launch initial marketing strategies tied to:
  - Current patients or clients
  - Referral sources
  - Community resources
- Emphasis on internal marketing, including:
  - Getting entire staff on board, from front desk to technicians to other clinicians or individuals within the facility. Provide a list of “talking points” to be used with patients or clients regarding interest and value
  - Schedule time during staff meetings to provide initial overview and then continue in future meetings with a “coaching case study of the month” (or similar)
- Consider offering a complimentary coaching session to all current patients upon discharge with a discounted rate to continue the first 90 days
- Consider offering the same complimentary coaching session to referral sources or someone in his/her office to experience the benefit

12 Month Action Plan

- Review results after 6 and 12 months for:
  - Total marginal costs such as those noted above and interest in each pricing tier.
  - Total direct revenue from coaching for facility (provide ROI – contrasting total investment on the part of the facility to the revenues provided)
  - Total indirect revenue for the facility
    - Enhanced referrals from specific sources or organizations when compared to historical figures
    - Increased overall referrals related to wellness coaching aspects
    - Reduction in turnover among employees contributing to this program
- Potentially adjust current tiers around rates and services based on what has been most popular among current clients/patients
- Consider value of expansion to include additional coaches, locations, and partnerships.
- Identify and launch additional marketing strategies around services provided.
**Additional aspects** to consider if offering this proposal to organization other than your own employer:

- Your time (including travel, if applicable)
- Marketing expenses
- Liability insurance expenses
- Limiting initial costs
- Time management

For more information, please visit [www.CatalystCoachingInstitute.com](http://www.CatalystCoachingInstitute.com) or contact us at Results@CatalystCoachingInstitute.com. We provide the nation’s premier CWC (Certified Wellness Coach) certification, approved for CEUs by both the National Athletic Trainer’s Association Board of Certification (NATA-BOC) and the American College of Sports Medicine (ACSM). In addition, we offer a comprehensive coaching web portal that provides the essential tools for marketing your program, providing ongoing resources to clients, and managing your clients in a HIPAA compliant-ready setting complete with electronic scheduling, SOAP note formatting and much more, for as little as $5/client/month. Contact us at your convenience for a complete tour of the web portal option or to discuss additional details around the CWC certification.