

INTRODUCTION

This checklist is designed to guide you through the steps to setting a foundation for successful practice by the time you graduate. Program durations vary from school to school—ranging from several months to several years. Sometimes the business course is taught midway and other times near the end of the program. Some schools include 15 hours of business education, others 100 hours. Because of the wide variation in programs, we divided the checklist into six segments of goals, skills, and activities for you to accomplish while you are in school. Divide your program length by six to determine your time frame for each segment. Depending on the length of your particular program, each segment could cover a span of time from less than one month to more than four months. Some items might not be applicable (depending on your career path), but this checklist gives you a good idea of what steps to take to research and navigate the path you choose.

For details on the activities listed here, seek assistance from your educational staff, professional advisors, or refer to the book *Business Mastery*, by Cherie Sohnen-Moe.

STUDENT SUCCESS GUIDE

SEGMENT I - SELF ANALYSIS AND INFORMATION GATHERING

- Identify your long-term personal goals.
- Collect business cards and brochures of other practitioners.
- Catalog your personal and professional strengths and challenges.
- Know the advantages and disadvantages of various career options.
- Begin identifying your career goals.
- Interview three successful self-employed practitioners.
- Interview three practitioners or managers who work in spa or clinical settings.

SEGMENT II - CAREER ANALYSIS AND BUDGETING

- Determine your start-up costs for a private practice.
- Create an estimated budget for the first year in private practice.
- Identify local agencies to start practice (licenses, permits, zoning).
- Ascertain the permits you need (and cost).
- Develop a personal budget for when you graduate.
- Formulate a break-even analysis.
- Research salaries (labor & statistics).
- List sources of startup financing.
- Chart the differences between running your own business and working for someone else.
- Assemble materials for a resume.
- Specify your ideal and minimal requirements for employment.

SEGMENT III - MARKETING ANALYSIS AND EMPLOYMENT KIT

- Design an ideal employment contract.
- Start keeping track of products that clients like.
- Determine marketing materials needed for self-employment as well as employment.
- Research [preprinted marketing materials](#).
- Make a list of people who could be referrals for jobs and clients.
- Identify potential employers.
- Draft a resume and cover letter.

SEGMENT IV - MAKING CHOICES AND FOCUS

- Create a list of networking groups (when, where, fees).
- Identify your networking needs.
- Clarify the type of work you want to do.
- Choose three target markets and complete target market profiles.
- Compile a list of potential employers.
- Check out several potential office locations.
- Interview several practitioners, clinics, and property owners regarding rental space.
- Survey at least 10 wellness practitioners' websites.
- Decide whether to be self-employed, employed, or a combination.
- Meet with a financial advisor.

SEGMENT V - BUSINESS PLANNING AND MARKETING

- Finalize long-term and short-term career plans and goals.
- Assemble a list of products you want to carry including suppliers' contact information.
- List elements to include on your website.
- Complete a competition analysis.
- Clarify your differential advantage.
- [Draft a business plan](#), emphasizing marketing.
- Finalize start-up financing requirements and sources.
- Arrange start-up financing.
- Make a business start-up checklist.
- Finalize your resume and cover letter templates.

Segment V continues on the next page...



SEGMENT V - BUSINESS PLANNING AND MARKETING *(continued)*

- Set up a business email account.
- Design your marketing materials.
- Print interim [business cards](#).
- Schedule job interviews.
- Role play job interviews.
- Create a practicum client feedback survey.

SEGMENT VI - MAKING CHOICES AND FOCUS

- Begin collecting supplies and building a music library.
- Set fee schedule.
- Finalize business plan.
- Create a list of practitioners for cross referrals.
- Go out on job interviews.
- Join at least one networking group and attend meetings.
- Set up software for tracking your clients and managing your business.
- Assemble paperwork for licensing and permits.
- Schedule three presentations or demonstrations for after graduation.
- Create [client forms](#).
- Send emails or letters to practicum clients.
- Send packets (letter, brochures, cards, coupons) to referral sources.
- Have a job lined up or an office space rented.
- Print marketing materials.
- List needed furniture, equipment, and supplies.
- Set up business checking account.
- Set up a support system.
- Get website online.
- Set up a Facebook business page.
- Set up a Twitter and/or other social media accounts.
- Send press releases about your practice opening.
- Set up a [weekly marketing schedule](#).
- Get insurance policies in place.
- Apply for business licenses and permits.



AFTER GRADUATION

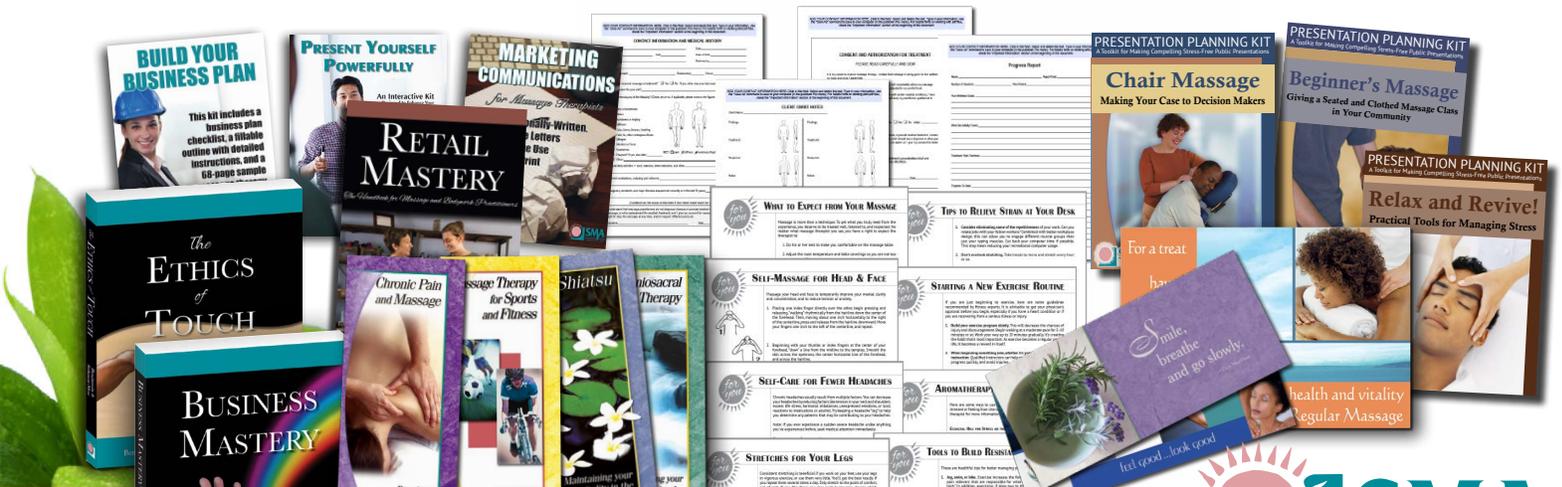
Once you graduate and take your licensing exam (while you are waiting for your license to become active), take the following steps to reinforce the foundation you started with the previous checklist.

- ❑ Establish a regular schedule or routine that includes self-care. In the “giving” profession you chose, it is imperative to make time for “receiving.”
- ❑ Complete any items from the Student Success Guide that you missed. It’s not too late, these are activities that can continue throughout your start-up period (and beyond).
- ❑ Give presentations and demonstrations to anyone who will listen. Get comfortable discussing the benefits and particulars of your work.
- ❑ Write letters and emails to others who share your target markets. Make connections for potential collaborative marketing ventures.
- ❑ Distribute your marketing materials (brochures, business cards) to everyone who cares about your success. Ask them to help get the word out that you are now in business.
- ❑ Assemble your Employment Kit (resumes, cover letters, proof of licensure/certification, proof of insurance, etc.), for easy access.
- ❑ **MOST IMPORTANTLY** - Find some time to relax and take care of yourself, you earned it! Congratulations!

READY TO TAKE YOUR PRACTICE TO THE NEXT LEVEL?

For more information on creating a fulfilling, thriving practice and keeping it successful, consider the entire [Business Mastery](#) text. *Business Mastery* is filled with resources to help you stay balanced, increase your client base, get organized, clearly define goals, and, most importantly, keep doing what you are passionate about while creating an excellent income stream.

Your initial training is critical, but it’s just the beginning. [Sohnen-Moe Associates](#) has products, services, and information to help you in your business planning, marketing, promotion, customer service, and communication efforts. Our resources allow you to get started right away, with little to no investment. Visit us at www.Sohnen-Moe.com.



STUDENT SUCCESS GUIDE

