



The Art of Practice

(First Edition)

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Acknowledgement

"I could not have followed the path I was set upon in life without the loving support of my husband and partner in all things, Vilnis. He is both my rock and the wind beneath my wings."

Sylvia Muiznieks

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Introduction

Many people who enter the alternative or complementary health care profession believe that once they have completed their studies, all they need to do to succeed professionally and financially is to open their practices. They believe that what they have learned through their training is going to help so many people that once their door is open for business, the clients will come.

Unfortunately, achieving sustainable business success is seldom that easy! Besides technical competence, attention needs to be paid to the other key pillars of positive business outcomes: planning, marketing, professionalism, and customer service.

The reality is that even the best practitioners – the ones who really know their “stuff” – are not always the most successful from a business perspective. There is more to starting and building a practice than just hanging up a shingle with your name and credentials. More often it is the average practitioner who has mastered the basics of good business principles that ends up having a practice that provides them with a good living as well as the satisfaction of improving the lives of their clients.

There are many aspects to setting up a practice that need to be carefully considered prior to opening. There are important business principles to follow when setting up a practice. But in the end, how you apply these principles, and thus how your business looks to clients, is really an art. As with a painting, you need to plan what you want to accomplish and how you want others to feel about your business. The planning and

implementation of solid business practices (including ethical practices) is critical to success.

You need to address the four components of the marketing mix for your business before you open your practice. The marketing mix is often referred to as the 4 P's – product, place, price, and promotion.

Working through the 4 P's requires you (or your partners) to cover all of the following roles: the service provider, the visionary, the administrator, and the marketer. (These roles are loosely based on the ideas presented by Michael Gerber in his book "The E Myth Revisited." See the suggested reading list.)

Here is a brief overview of these four roles:

The Service Provider

People coming for HelioSol sessions are getting a service, not a product. That service depends on their relationship with you. To cultivate this relationship, you need to be the best practitioner that you can be not only in terms of skills and knowledge, but also from communication, empathy, and ethics perspectives, to name a few. You need to develop therapeutic relationships through building trust, safety, and comfort.

The Visionary

Your mission and vision need to be clear about what you are offering, how you want your business to be perceived and where you want the business to go to in the future. A service is intangible, so you will have to think about it differently than a physical product.



The Administrator

Appropriate administrative policies and procedures need to be in place so your business runs smoothly. This also includes designing your place of work to make a good first impression, setting your fees, implementing your bookkeeping system, and staying on top of all the related paperwork.

The Marketer

Even if you are a great practitioner with a vision of where you want to go with your business and everything is in place for business operations, it will not matter if no one knows about you! You need to create a marketing strategy for how you are going to effectively promote yourself and your service(s).



Depending on your current skill set in each of these areas, you may naturally be inclined to spend more or less time working through the planning and executing of these responsibilities. But you cannot afford to neglect any of these areas.

If you have no business background at all, it may be necessary to contract some experts at the beginning for advice. For example, you may need to consult an accountant or bookkeeper to help you set up the most appropriate accounting system for you. Or you may need to talk to a lawyer to ensure you meet all the local legal requirements related to your service-based business. Or, if you are totally overwhelmed, you may even approach a business coach to help guide you through all the steps.

The typical new practitioner will start out by personally taking on all four roles – at least by thinking about everything that needs to be considered before hanging out that shingle. Fortunately, there are many resources out there on the Internet and in bookstores or libraries to support you.

Eventually, once the business is established, you may decide to continue the work in all four roles yourself or delegate some of the responsibilities to others – depending on your own interests, skills, priorities, and resources.

We will be examining the factors that go into creating positive outcomes for a HelioSol practice in terms of these four roles. By paying attention to these factors, the chances of creating a practice that is both satisfying and financially viable for you, the practitioner, as well as beneficial for your clients, will be much greater.



Part 1

The Service Provider



The first thing that you need to understand is that you are providing an “intangible” service, which means that your clients are paying for something that does not exist in a physical state, that they cannot see, touch or taste. When clients see you, they may be suffering from some symptoms, be in pain and/or be feeling unhappy. After the service, that is after the session, they will hopefully get better, notice a change in their symptoms and/or feel less pain. What you have provided as the “end product” is a shift, a change in perception – not something tangible.

Since clients will leave your session without a physical product in their hands, you need to focus on making the client feel that they have just received an exceptional service from all perspectives. You can predict what most clients will appreciate (e.g., results, friendly respectful tone), but others will have their own unique expectations (e.g., hours of practice, option for distance sessions). Listen to the clients’ specific needs and expectations and act on them whenever possible.

Remember that other HelioSol practitioners are able to provide the same type of service, and the client can also choose among practitioners of other modalities. What makes a potential client choose you over another HelioSol practitioner? Or over a massage therapist or another type of practitioner? Understanding why a potential client might choose you is an important step in understanding how to approach your whole business.

Most people looking for a HelioSol practitioner will likely research their options. They will have looked at websites, read brochures and testimonials, or have perhaps even spoken with you before deciding to go with you or not. So, it is important to not only be the best practitioner you can be, but also focus on the little things that matter to people when entering into a therapeutic relationship with a practitioner. Providing what they are looking for is a way to make them feel valued, safe, and comfortable in your hands.

In simplistic terms, someone will choose you because of their first impressions of you – whether directly through a personal interaction, or indirectly through your website or Facebook page, etc., or through a testimonial or recommendation from someone they

know. But they are most likely to stay with you due to the relationship they develop with you.

Let us examine what goes into developing strong relationships with your clients – as well as what to avoid – thereby making you the right choice of service provider for them.

Probably the most important factor is to interact with people from a place of authenticity. This means coming from the heart, working with integrity, and showing empathy, compassion, and acceptance towards others.

This is especially important since the whole HelioSol System is based on helping people move towards living from a state of agape love. As a HelioSol practitioner, you need to “walk your talk.” This means coming from a place of no judgement of the client’s age, race, gender, sexual identity, health problems, and the stories that they share with you. Clients need to be treated with dignity and feel respected. Listen to the meaning and emotions behind their stories to pick up what is really being said. By being empathetic to their situations, the client will see that you understand their point of view and thus feel safe and less alone.

In addition, do not attempt to “rescue” anyone. Any practitioner who feels the need to rescue a client is not operating out of empathy, but rather out of sympathy. There is a difference. Working out of sympathy, trying to “fix” the client’s situation, demonstrates that the practitioner is working from an egoic perspective, imposing their set of beliefs about what is needed to heal onto the client. Although it may be on a subconscious level, clients will pick up on that type of energy and be “turned off.”

When acting ethically and in integrity, the side benefits are that clients will feel good in your presence, trust you, and be more likely to recommend you to others as a good practitioner. This type of word-of-mouth is the best way to grow your clientele.

Make a good first impression by coming across as professional. This pertains not only to the atmosphere you create within your clinic space, but also to how the client is greeted. Be conscious of how you dress and what message that sends to the client.



You may consider offering an introductory session at a special rate so that you can show the prospective client how you work and give them the opportunity to get to know you. This will help reduce the client’s initial worries about what they are getting themselves into – especially if the client has never experienced a HelioSol session. Making the client feel comfortable and safe in a “trial session” will begin the process of them developing trust in you.

Set up professional boundaries. Be aware of clients projecting old feelings, attitudes, or unresolved issues they have about someone in their lives onto you – this is called transference. Avoid projecting any of your own personal feelings onto your clients – known as counter-transference – and do not merge the roles of therapist and friend. Not allowing or entering dual relationships will make clients feel safe. Ambiguous relationships may lead to violations that are interpreted as intrusions into personal space – the worst of which are romantic or sexual relationships (that could result in professional malpractice).

Keep small talk to a minimum and revolve the conversation around the client's particular needs. Maintain eye contact while asking clarifying questions. Keep



everything they tell you confidential. Remember that clients share very private and personal information about themselves, which makes them vulnerable. Even acknowledging to another person that someone is coming to you for sessions or talking to other health care practitioners about a client by name and their particular situation are breaches of confidentiality. You need to

be very careful in your conversations not to identify any client by revealing personal information.

The only time that confidentiality may be broken is when the law dictates that you disclose the information when you suspect that the safety of someone is at risk. Three situations are: when there is a threat to the client themselves (e.g., they tell you they want to commit suicide), a threat to someone else (e.g., they indicate they want to harm another person), or when you suspect abuse of any kind. To protect yourself, make sure you document everything that is said in any one of these situations and contact the appropriate authorities. There is a document in Appendix E with more details of when it is legally imperative to breach confidentiality.

Also, make sure that you solicit the client's consent to share any of their personal information with a third party upon their request, such as an insurance agency. It does not happen often, but occasionally a client has insurance coverage for their sessions and in order to receive that benefit, the company involved requires a report summarizing what came up in the sessions. The client needs to be informed of this and give their consent before proceeding with the report.

Clients should also not hear about the problems of other clients. You do not want them worrying that you might be revealing their situation to others. By promising to hold in confidence what they tell you, clients will be able to trust that they can safely open up to you about their issues.

Do not complain to the client. Clients do not want to hear about your problems or that you have had a rough day and are tired. You do not want the current client wondering about your ability or fitness to conduct their session.

As a side note to this last point, make sure that you engage in self-care (like doing the HelioSol Technique regularly) so that you stay healthy and have enough energy to work in the present moment with total focus on the client in front of you. And if required, that you will seek getting your own HelioSol session or be seen by other health care providers when necessary (including western medical professionals).

Keep up to date with your knowledge. Continuous learning is appreciated by most clients. They feel more confident if you demonstrate to them that you are constantly looking for more information to help them with their concerns. Though most clients are not able to objectively evaluate the quality of your expertise and knowledge relative to other practitioners, they will get a sense of your competence from how you present yourself during your sessions.

People are experts at knowing whether they feel valued or not. So, respond to queries by phone, email, or text in a timely manner, start and finish their sessions on time, and give your full attention to them during the sessions. Do not rush through or cut sessions short. Though HelioSol practitioners' fees are not based on the length of sessions, if an hour has been set aside and the session ends before the hour is up, consider adding something extra. Clients will see this as added value that they may not receive from anyone else.



These actions impress upon the client that you are listening to them, giving them the information they need, and respecting their time. While these may be simple acts on your part, they will help make your clients feel that they matter.

Even though HelioSol practitioners cannot guarantee any positive results after a session, clients appreciate being warned about any possible “reactions” that could arise after their sessions – especially new clients who have never had an energy-based treatment before and are not familiar with how their bodyminds react to energy moving. For example, if you tell them that they may feel thirstier or need to go to the bathroom more often (the body’s way of detoxing itself) or need to sleep longer than usual (to integrate the shifts) or feel “strange” (as attachments to beliefs drop away), it will subdue any possible concerns that something has gone “wrong” as a result of the

Part 2

The Visionary

There is a reason you chose to study and become a HelioSol Practitioner. Something drove you to spend your time, money, and effort to learn the material that makes up the system. Perhaps you experienced a powerful shift in your own health or life circumstances by receiving HelioSol sessions yourself and want others to experience the same sort of improvements. Perhaps you are the caregiver of a person with disabilities and wanted to learn how to ease their discomforts from a wholistic, spiritual perspective. Perhaps you were curious when you saw the HelioSol Healing Wheel and then became fascinated with the philosophy and approach. Regardless of what attracted you to become a practitioner in the first place, you are now feeling enthusiastic and ready to use your new knowledge, insight, and skills to be of service to others.

Knowing in your heart that what you do helps people is important. It is the driving force behind all the time and effort you will pour into starting up your clinic. Coming from your heart will fuel the discipline required to keep going when the going gets tough (and it will get tough at times!).

However, your enthusiasm and sense of purpose are not enough to get you through the inevitable challenges you are going to face. It is too easy to become discouraged if you do not have something tangible in place to fall back on.

This is why it is important to put into writing why your business exists, what service you are actually providing, who will benefit from your service and where you want your practice to go in the future. You need to know your values and how you want to show



up in the world. In other words, you need to know what your mission and vision are. This information will not only help you communicate clearly to your potential clients but give you the structure on which to base your decisions and guide the steps that need to be taken to achieve the big picture you have in mind.

Your mission and/or vision may change over time as you gain experience or come up with new ideas. But thinking about them and being able to clearly articulate them will contribute to your sense of direction, motivation, and confidence.

Start with Mission and Vision Statements

A mission statement communicates in simple terms what a business does, in essence its purpose for being. This will likely differ for every practitioner, depending on what they feel is most important about their work and how they want to convey this to the public.

Some examples of mission statements are:

- *Through the application of the latest scientific understanding combined with ancient spiritual knowledge, we aim to help others access the natural healing ability of their body and mind.*
- *We create the opportunity for people to live more fulfilling lives by supporting their ability to change their minds and heal their bodies.*
- *To provide a safe environment in which healing sessions can take place for those seeking a non-invasive approach.*

Here is another example of a mission statement for a business (Innate Healing Inc.) that has more than one aspect to it:

“Through courses, clinical work, client education, and products, Innate Healing’s mission is to help others throughout the world access their natural healing abilities, realize the potential of their minds, and live more fulfilling lives.”

In each of these cases, the wording lets the public know what the business offers, who can benefit, and what the benefits are.

As opposed to mission statements, vision statements do not need to be made public. These reflect the “big daydream” of where you would like your practice to be in the future – what you will strive for. The end goal can be as big as you can imagine or be kept small. It all depends on what you want out of your business.

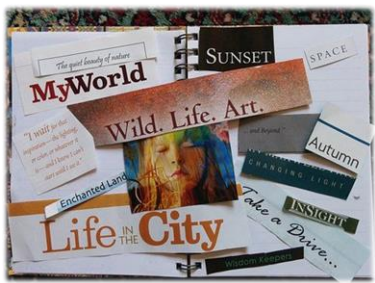


A good exercise to help you determine your vision, if you do not already know it on a conscious level, is to go into your AgapeMind Retreat and pose the question. Allow the mental tools to show or tell you where your business will be in a year, in two years, in five, and ten years from now. This will give you a glimpse into the possibilities for the future. (Make sure that you radiate gratitude and happiness for the information shared with you!)

There are a couple of ways to bring your vision to the attention of Universal Consciousness and to activate the Law of Attraction. One way is to write your vision down in statement format and read it regularly.

Here are some examples of vision statements:

- *To maintain a successful part-time healing practice that provides outstanding service to a loyal clientele of 50 people.*
- *To create a multidisciplinary complementary health clinic where people receive the best wholistic care that is currently available.*
- *To spread the opportunity for people to change and heal using the HelioSol System by becoming an instructor and inspiring others to become successful practitioners.*



Another, more visual approach, is to create what is known as a vision board. This gives you a pictorial representation of your end result. For this, you can either draw images or cut out pictures from magazines that symbolize or reflect where you are headed with your business and what the end benefits to you will be and paste them onto a poster board.

Whether you use a vision statement or the vision board, either can be placed somewhere where you will see it every day – perhaps in the bedroom so that it is the first thing that you see in the morning. By reading the statement daily or giving the various images energy and feeling gratitude for moving towards the realization of your vision, the universe will provide opportunities for bringing about that which you have asked for.

“All our dreams can come true – if we have the courage to pursue them.” Walt Disney

Limiting Beliefs

What may sabotage you or hold you back in achieving your dreams are your limiting beliefs. We have been inundated from the moment of birth with what other people tell us about who we are and of what we are capable – either directly or indirectly. Often that results in a negative self-image of ourselves that diminishes our self-confidence and makes us want to give up on aiming for our biggest dreams.

Beliefs are self-fulfilling prophecies; everything in our inner world (mind) projects to the outer world, onto the circumstances we draw to ourselves. As mentioned earlier, the vibrations of our thoughts are powerful. The universe reflects them back to us regardless of whether those thoughts are “positive” (as in the vision statements) or “negative.” Universal Consciousness is non-judgmental in that regard. Whatever we project out, the universe fulfills.

Some examples of “negative” beliefs we adopt as truths about ourselves are:

- I will not succeed because I am not good enough and clients will not come.
- I am not worthy to be successful.
- I do not have what it takes to start a business.
- I am not smart with numbers or money.
- I will be judged as greedy if I charge for something so simple and easy.
- I won't get clients if I charge too much.
- I hate marketing myself. It feels like I'm trying to hustle business.

If we continue to operate from these types of beliefs, we will have expectations, habits, and programming that will make us to fail to reach our potential. You need to become aware of what specific limiting beliefs you are holding in your conscious and subconscious mind about your ability to run a successful practice and then transform them. This means moving out of your comfort zone into areas in which you may feel uneasy at first. To manifest something new, you need to shed the old.

Also, remember that beliefs are just that – beliefs. They are not truths! Releasing your emotional attachment to limiting thoughts can be achieved by receiving HelioSol sessions and by crafting S.M.A.R.T. goals and a business plan to guide you through to your success.

There is a saying to “know where your moon is before you set the rocket in motion.” The vision you have is your moon, and the path taken by the rocket depends on the steps of your business plan to get there. The path is seldom a straight line and will likely need to be adjusted along the way. So, next we look at the role of the administrator who is the commander of your rocket.



Part 3

The Administrator

The role of the administrator is to look after building and then managing the business. Fulfilling this role seems to be the one that many practitioners resist the most. Working on building the business seems daunting to the point that people avoid it, telling themselves they would rather spend the time doing healing sessions – being the practitioner. Unfortunately, all too often this avoidance of planning and setting goals results in a less-than-successful practice.

“Don’t value planning for its result – the plan. The greatest value of the plan is the process, the thinking that went into it.” Harry Beckwith



Even if you simply take the time to think through the different areas of a business plan and jot down your thoughts, you will increase the chances of making the right decisions at the right time to move your business forward. Having this informal structure will provide guidance around when to say “yes” to something, and when to say “no” to that which does not fit into your goals and ultimate end vision. This clarity can save lots of energy and time in the long run – and will keep your stress levels down!

“If you don’t know where you are going to, you will end up somewhere else.”
Lewis Carroll

Before we get to the details of what goes into a business plan, we need to talk about some general concepts.

Business Structure

One of the first decisions to make is what business structure to adopt. In Canada, there are three options – Sole Proprietorship, Partnership and Corporation – each of which has its pros and cons. Other countries may offer additional structures for small business owners – for example, a Limited Liability Company (LLC) in the United States is kind of a hybrid with features of both Partnerships and Corporations (e.g., limits personal liability of business owners). In a generic sense, the review of the Canadian structures below will illustrate important things to consider when determining business structure, regardless of where you live.

Sole Proprietorship: This is the simplest structure and usually most practitioners will start here. As a sole proprietor, you are the only person involved in running the clinic and you submit the net income made from the clinic on your personal income tax return. You assume total liability for all aspects of the business. You can also register your trade name under a sole proprietorship.

Partnership: A business partnership can consist of you and any number of other people. The trade name is registered and every partner shares in the liability of the business. In this model, each partner pays income taxes on only their share of the clinic's income.

Partnerships are tricky! Partners need to spend a lot of time working closely together, to make important decisions that will affect the financial health, work environment and future direction of the business. Different management styles, risk tolerances, personal habits, visions, and goals can over time (or in short order!) sour any relationship – and thus the partnership.

Often partnerships are started by a couple of friends who are excited about the concept but are not diligent in dividing out the responsibilities of the business. If, for example, both partners only want to work with clients and neither one wants or has the skills to take responsibility for the management or marketing roles, the business will fail to prosper. Many such partnerships have ended friendships.

If you really want to enter into a partnership with someone, before committing, together develop a comprehensive business plan that covers how all the necessary business roles will be executed and how the startup funds will be secured. Also, prepare a mutually agreed upon written “pe-nup agreement” so that you both understand what will happen if one partner decides to leave the partnership, or if you both want out. Arranging how to break-up the business beforehand may ultimately save the initial friendship.

Corporation: A corporation is a separate legal entity. Incorporation provides the owner(s) a layer of protection for their personal assets (limited liability) for business activities and debts should a lawsuit be instigated. On the other hand, owners of sole proprietorships or partnerships face unlimited liability for both business and personal assets.

Corporate tax rates for small businesses are generally lower relative to personal tax rates. Therefore, incorporation could be beneficial from a tax savings or tax deferral perspective for some small businesses. But this is not true for all small businesses, especially if the business is incurring losses in the early period.

It takes more time and effort to register a corporation, and the ongoing administrative costs and requirements are higher than for a sole proprietorship. For example, a separate annual tax return needs to be completed for the corporation and there are also legal filings to stay in good standing.

Incorporation makes more sense when a business starts generating more income and increases in complexity (e.g., hires employees, has multiple products/services and/or locations). It is often a good idea to consult with an accountant or lawyer before taking this step.

Summary

Every person setting up a business must analyze and evaluate which business structure is the most appropriate one for them. The most sensible approach for most HSPs starting out is to be the sole proprietor (or possibly an LLC in the US). Starting with a simpler structure gives you a chance to test the waters with your business model and gain some experience, as well as write off your startup expenses. Your business structure may change as your clinical practice grows and increases in complexity.

Collecting Taxes on Sales

Different countries (and sometimes regions within countries) have their own laws around collecting sales taxes and/or value-added taxes for services rendered. For example:

- In Canada, the Provincial Sales Tax (PST) varies by province as does the way it is applied and collected. There is a 5% federal Goods and Services Tax (GST), but some provinces have chosen to use a Harmonized Sales Tax (HST), which combines their provincial sales tax rate with the GST. So, provinces have either the federal Goods and Services Tax (GST), or a Harmonized Sales Tax (HST), Provincial Sales Tax (PST), or Quebec Sales Tax (QST). On top of that, each

province has its own exemptions and rules around when a small business must apply and register.

- In the United States, sales taxes are governed and administered at the state level and no general federal sales tax exists. Some states do not have a sales tax and others have varying rates.
- Within the European Union, it is a Value Added Tax (VAT) that is applied to goods and services. EU member countries also have different amounts of VAT that must be charged, anywhere from 17 – 27%.

Nearly all governments, whether federal or local, provide numerous categories of goods and services that are exempt from sales tax or are taxed at reduced rates. There are also differing regulations for charging sales tax depending on place of supply, that is, when a service is bought by someone in the same jurisdiction as opposed to when it is bought at a distance by someone not in the same jurisdiction as you.

Different countries also have different rules as to how much a company needs to earn before needing to register and start collecting GST/HST, VAT and other federal taxes.

It is important to find out what is required in your own jurisdiction and to follow those rules. No matter where your clinic is physically located, it is recommended that you consult either the appropriate level of government or an accountant who is familiar with the local regulations; the Internet can also be a valuable resource for researching the tax rules in your jurisdiction. And do not forget that laws/rules are also subject to change, so you need to stay on top of the tax situation.

Having different rules in different places can make the tax collection and reporting process complicated. Ultimately, it is your responsibility to find out the rules and to adhere to them – or else you could incur stiff penalties.



Business Name

Your business name is important to your practice. It says a lot about you and what you want to highlight. It is helpful to come up with a professional business name that people can easily remember and makes sense with respect to the services or products you offer. Do some research to see what other practitioners in the field have named their businesses. Which business names resonate with you? You will find that some practitioners have chosen to use their own personal names, others have incorporated

the name of their primary modality, while others have used words that indicate what their work results in. All these approaches have their merits.



Once you have selected a few possibilities, you can do a search to find out if the names you like are already taken; in most cases, you cannot legally use the name if it is already being used by another business. It is also a good idea to check whether associated domain names are taken. The easiest way to start this search is on the Internet, and then you can check with national databases and domain registrars. If the names are available, test them out on a few people you trust to give honest feedback. At the same time, make sure that once you have chosen your business name, that you register it to protect it from being taken by someone else.

Place – Location of Your Clinic

Where you locate your practice will depend on your personal living situation, on what makes economic sense, and what opportunities present themselves.

Many practitioners begin by practicing out of a dedicated space in their homes. This works as long as the local government allows home-based businesses, and you have an appropriate space in which to create a professional healing room. If you



work alone from home, make sure that you take precautions so that you are and feel safe. Also, if there is a pet in the home, then prospective clients need to know this in advance so that they are prepared for the encounter or opt out of booking with you.

Another option is to rent some space within someone else's clinical setting. You will need to negotiate a financial agreement. Some clinic owners will want to set a fixed monthly rent, regardless of how many clients you see each month. If you are not sure about how many clients you will be able to attract, you should negotiate a trial period; you are better off to walk away than to incur a long-term fixed fee that you cannot afford.

A third possibility is to set up your own external clinic. This can be a costly venture, so you need to make sure you have the clientele to support it. Or to make ends meet, you may need to rent space to other practitioners – though this will have associated financial risks (e.g., if you can't find renters) as well as time commitments.

These days, some practitioners may choose to provide most or all their HelioSol sessions by distance: by Zoom, Skype, telephone, or email. All you require is space, a computer with a good webcam and decent audio, and a quiet time during which the sessions can be scheduled.

Of course, you can use a combination of the above options – maybe rent an external space one day weekly or biweekly for in-person clients and do your distance healing sessions at home.

Regardless of where you practice from, make sure the space is clean, uncluttered and comes across as professional. Your space contributes to first impressions and leaves lasting impressions that clients have of you. When designing and furnishing your clinic room, look at it as if you were a first-time client walking in. Does it look inviting and instill calm? Is the colour selection and lighting pleasing to the senses? Is there anything that could offend someone? Are the waiting area chairs comfortable? Would you want to come back to the space again?

The choices you make regarding your clinic space will reflect something about you and at the same time have an effect on your clients’ subconscious state of mind. So, put some careful thought into what image you want to project.

Price – Fee for Service

There is no other topic that triggers new practitioners more than coming up with what they are going to charge for their sessions. There are so many beliefs tied into the “worth” of the work that just thinking about setting the fee elicits a lot of emotions. It is important to recognize this and then come to grips with your specific beliefs around issues such as self-worth and the value of your work. Then when someone asks “what do you charge for a session?” you can answer without any guilt or other ‘negative’ emotion. You need to be able to respond confidently and receive what you are worth with grace and gratitude.



Remember that you put in a lot of time, money, and effort to learn how to do this work. Your fee needs to reflect that. You are charging for your knowledge, skill, expertise, and experience in guiding someone to feel better – not for the time you need for an individual session.

Here is a story to illustrate this point:

A man had a squeaky floorboard that annoyed him to no end. It had creaked for months. He tried everything in an attempt to silence the floorboard, but nothing worked. He finally got fed up and called a carpenter. The carpenter walked in, crouched down, looked the floor up and down... 30 seconds later, he took out a nail, and banged it in with three quick blows. The creak was gone.

He pulled out his invoicing pad and scribbled the price on the bottom: \$50. The homeowner was outraged. "You've been here less than a minute! How can you justify that??" The carpenter took the invoice slip back and added two simple line items to it: hammering = \$2; knowing where to hammer: \$48.



You are charging for knowing what to do and how to do it, not for the time it takes you to do it.

You also need to remember that you are conducting a *business* – not a *hobby*! And a business is for making money so that you can not only survive but thrive. You need your clinical practice to provide you with the means to give you the life you deserve. You deserve your share of universal abundance. You also need to earn enough to cover the costs of continuous learning, so you gain the knowledge and skills to help your clients even more effectively in the future.

There is something called the resistance principle which states that a little resistance to the fee that you set is a good thing. The reasoning is that if no one complains about it, then you have set it too low. If everyone complains, then it has been set too high. Of course, there are always going to be a certain small percentage of people who complain no matter what your fee is. However, if you have a few people who hesitate when they hear what you charge, you are probably in the right range – you are high enough to not scare everyone away.

A basic mistake that new practitioners make in the beginning is to conduct sessions on people for free while they are still “practicing.” This is a mistake for several reasons:

- If there is no energy exchange (money or something else for the session), the clients may not be invested in the results and so will not experience all the potential benefits.
- The client’s belief systems may even sabotage their responses to the sessions – “this work can’t be worth much if there no charge!”

- When you do begin to charge something for the session, many of those people who were receiving them for free will “disappear” – they will not translate into paying clients – “why should I pay for something I got for free?”

It is better to charge something (at least a token amount) for your work right from the beginning. You can do this in a number of ways if you do not wish to set a firm fee at first. You can:

- Ask the client to provide you with a testimonial and permission to use it in your promotional material (but only if they find your sessions beneficial!).
- Encourage them to refer others to you in exchange for the sessions they receive (but again, only if they felt your sessions were beneficial!).
- Let them know that you will be charging X amount when you are licensed (so they know what value they are receiving) and then ask that they donate what they feel is appropriate for the current session.
- Barter for services the client has to offer.

Of course, any option you go with needs to be legal in the area you live. Just never give away your sessions for nothing!



One more thing to remember: Price is often considered to be an indicator of service quality. Many people perceive lower prices to be linked to a lower standard of care and higher prices to mean that they will receive better services from a more qualified practitioner. Clearly, this is not always the case, but it is an argument against setting your fee simply to become the low-cost provider. Also, if you do decide to be the low-cost provider, someone else may come along and offer an even cheaper rate, possibly starting up a war in trying to appeal to those clients making their decisions strictly based on lowest price.

It is a good idea for new HelioSol practitioners to conduct market research to determine what other alternative health practitioners are charging in the market they are targeting. Then charge what they feel is a fee that both reflects the value that they are providing and still keeps within the range of what their likely clients are able to afford.

Having said that, if you are able to differentiate yourself from the other practitioners in your area, do not be afraid to set a fee well above the going rate.

Remember that you can always increase your entry level rate after you gain experience, grow your reputation, take more courses so increase your expertise, and so on.

Another approach to determining your fee (and also to give you more insight into the revenue-related goals you set for your business) is to go through the following exercise:

- Begin with how much money you wish to clear in a year (net profit)
- Add your fixed costs and variable expenses (e.g., licensing and professional memberships, insurance, rent, office supplies, training) to calculate the gross income required to earn the profit you want to achieve.
- Figure out how many weeks you want to work in a year (consider how many weeks you plan to take off for vacations, holidays such as around Christmas, or for other personal reasons)
- Multiply the number of sessions you want to perform per week by the number of weeks you want to work to determine the total annual number of sessions.
- Divide the number of sessions into the total gross income per year to determine how much you need to charge per session.

This will give you an idea of how much you need to charge to make the type of net income you want. The higher your fee, the less sessions you will need to do per week in order to achieve your net profit goal.

To fine tune your projections even further, you will need to work the following into your calculation:

- Will you offer discounts (like packages, gift certificates, family or senior rates)?
- Will you allow any price flexibility (like a sliding fee schedule)?
- Will you be 'donating' any clinic days for charitable work?



A word on selling packages of sessions: some clients are satisfied in making appointments one at a time depending on how they feel. However, many people believe they will benefit more if they have a series of sessions rather than just one or two to address their concerns. It is an individual business decision whether or not to offer packages of 3, 5, or more sessions at appropriately discounted rates. Some clients may appreciate the option. On the other hand, some clients may perceive packaged sessions as a “money grab.” So, you need to consider what impression your pricing strategy will project. If you decide not to offer package deals and are asked about it, just say that you have instead carefully set your fee at a fair rate.

A word about guarantees: First of all, it is unethical for practitioners to guarantee “cures” because results from sessions are very individual and you do not want to create false expectations. Also, when a physical product breaks down or does not work, you

know it. That is why money-back guarantees can be made for products. But how do you know when a session has “failed?” We know that shifts are subjective and can be very subtle, with a positive outcome not becoming evident for some time. So, when a client tells you that they did not experience a dramatic change in their health after one session, it is not a sign of failure. For this reason, it is recommended that practitioners do not promise any specific results or use money-back guarantees to attract clients. They should rather use concerns of this nature as an opportunity to educate clients on how different people respond differently to energetic work.

S.M.A.R.T. Goals



Before you can set goals to your business, you need to know what goes into creating successful goals – ones that you will be able to follow through on, providing the steps to reach your vision. A very useful approach is to use what are known as S.M.A.R.T. goals.

Each letter stands for a feature that makes the goal attainable.

S = Specific, M = Measurable, A = Acceptable, R = Relevant, T = Target date

Let us take a closer look at these features.

S = Specific

When you break down what needs to happen to get to your moon, be specific. Write down exactly what it is that needs to be done in the short term. Some examples are:

- Initiate a search of my proposed business name, “ (insert the name) ,” to determine if it is available for me to use locally in Alberta and nationwide in Canada by March 1, 2021.
- Finish studying all the foundational courses required to attain the HelioSol Practitioner designation by June 30, 2021.
- Complete 50 introductory sessions (at 6 per week) at half (\$45) my future going rate within 10 weeks of being licenced.
- Create a logo that complements my business name by July 31, 2021.

Be aware of what wording you use in your goal statements. Do not use limiting words such as “try” or “should.” For example, the statement “I’m going to try to finish all eight foundational courses” only demonstrates that you are not committed 100% to finishing the courses. Better to say “I will finish all eight foundational courses.”

M = Measurable

You need to know when each goal has been achieved. For this, the goals need to have something in them that is measurable. For example, you know which courses are the foundational ones that are pre-requisites before you can apply to be licensed as an HSP. Therefore, once you have completed the last one, that goal has been achieved.

A = Acceptable

It is not useful to you (or possibly to others around you) to have goals that are not acceptable to you from personal and ethical perspectives. An example of an unacceptable goal would be “to destroy the reputation of all my competitors so that I gain the entire market out there.” Instead, a more acceptable goal would be “to market myself as an excellent HelioSol practitioner providing my clients with proven results.”

An important point to make here is that the goals you set need to be right for you, and not be unduly influenced by the goals of others. One of your fellow practitioners may set a goal of seeing at least 20 clients per week, but if you would be most happy with a part-time practice, then do not feel pressured to set a goal higher than what is practical for you. In setting goals, you need to be true to yourself. For example, you would not want to set a goal for an income that would require you to work so many hours per week resulting in a lifestyle that you were unhappy with.

R = Realistic

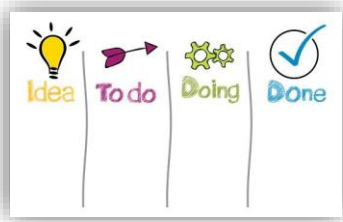
Unrealistic goals are difficult – even impossible – to reach, leading to disappointment and ultimate failure of your business. An example would be “to clear \$250,000 profit in my first year.” There is nothing wrong with having a long-term goal of making that much profit, but for most people it is unrealistic to expect that in the first year of practice. Better to have a more realistic figure to aim for and be surprised if you surpass it, than feeling that you failed and being discouraged from continuing to work on your business.

At the same time goals cannot be too easy to achieve either, or they will give a false sense of accomplishment.

To be realistic, goals also need to be under your control. Let us say, for example, that one of your goals is “to borrow \$50,000 from Grandmother as start-up capital.” You may have every intention of paying her back, but you are not in control of:

1. Whether your grandmother has \$50,000 that she can loan you, and
2. Whether she is willing to loan you the money.

More realistically, the goal may be “to explore the possibility of Grandmother loaning me some start-up capital to buy a massage table and computer.” Now the goal is under your control and whether Grandmother says “yes” or “no,” the goal will have been met.



T – Target Date

It is not just good enough to set your goals without also setting a target date by which you need to accomplish them. This will provide the motivation to move forward. Otherwise, the human tendency is to procrastinate, i.e., to “put off until tomorrow what can be done today.”

Setting Goals

Thinking through and writing up your business goals are going to help you clarify what you need to do to get your business off the ground (and then to bring it to the next level). Setting goals will also make sure that you focus on the right things. Once you have gone through that process, you need to commit yourself to them. Taking some action towards them every day is one of the keys to success.

There needs to be a healthy balance between planning and doing. To help you move from planning and strategizing to action you may ask yourself a couple more questions: what are all the things/people/information that I need to achieve my goals and what steps/activities do I need to schedule into my day timer? Then assemble all the things/people/information you need and look at your day timer each day to keep up with the steps you have outlined for yourself.



And know that it is OK to change your goals if something happens in your personal life or business that affects your action plans – a necessary change is not a failure! Written goals are still flexible. Record why you needed to change your goals so that when you review where you have been and where you are now going, you will remind yourself what happened to change your original course of action.

Also, remember to celebrate your achievements! If you have identified the milestones along the way, you can give yourself rewards for reaching them. These rewards do not

need to be huge or expensive, just something a little special to acknowledge your accomplishments.

“It’s amazing how lucky I get when I set goals.”



Your Business Plan

Now that we have gone over the general concepts that administrators need to take into consideration when beginning to build a business, you can apply those ideas and skills to flesh out the details of your business plan.

“It’s not enough to be busy; so are the ants. The question is: What are we busy about?”

Henry David Thoreau

Your business plan is what will solidify for you what you are busy about.

Your business plan outline (which includes your marketing plan) will provide you with many benefits. By thinking through the different areas, you will:

- Gain clarity on all aspects of your business.
- Increase the probability of success.
- Determine where your practice needs to go (with both short-term and long-term goals).
- Help ensure that you do not slip into spending time in activities that do not fit with your goals and overall plan.
- Evaluate your ideas, perhaps leading to modification to your mission and vision statements.
- Forewarn you of any possible obstacles.
- Identify risks, opportunities, and threats.
- Become your ongoing management tool.
- Outline your marketing strategy.
- And if required, become the document to submit to a financial institution when requesting a loan.

As to the last bullet point, your business plan would need to be presented as per the format provided by the specific financial institution you plan to approach. If you do not require a loan, then you have more flexibility regarding the format. But it is still recommended that you produce a written plan so that you have a readily accessible record of your mission, vision, research, goals, marketing plan, etc. – a reference to come back to when you get lost.

Informal Approach

You will find a comprehensive, generic Business Plan Outline in Appendix A to guide you in the preparation of your own business plan. Many of the points under the headings are discussed in depth throughout this manual, but there are others that you will need to contemplate on your own. By thinking about and answering the following questions, you will be better able to obtain the information required in your business plan.

- What trends do you see in the energy therapy world? How do you see yourself adapting to fit in? Or do you want to do things differently?
- Are there any barriers for you developing a HelioSol practice? For example, is your family on board? If not, how will you deal with that situation?
- Who is your target market? How will you attract your clients? Is there a gap/need in the market you can fill?
- Who are your competitors? What are their strengths and weaknesses? What can you learn from them?
- How are you going to differentiate yourself from your competitors? Do you have a strategic competitive advantage?
- What will you do to keep your clients? Are you going to give your clients more value than they expect?
- What is your fee structure going to be? Will you offer packages or discounts?
- How are you going to let clients know that you are collecting their personal information under the privacy regulations that are mandated by law in your area (e.g., PIPA, PIPEDA, or GDPR)? And that they may withdraw their consent at any time?
- What is your policy for cancellations? How much advance notice do you need? Or will you automatically conduct the scheduled sessions by distance? Will clients who miss an appointment need to pay a cancellation fee?
- Where are you going to securely store client records? And for how long do you legally need to keep them?
- How will you let your clients know about *all* your policies?
- How will you get client feedback? How will you use that feedback to build credibility, loyalty, and trust?

- How are you going to transition from your current job/situation to private practice?
- Are you starting out part-time or full-time?
- How will you manage your time? Will you use an online or paper calendar to organize your days? Will clients book their appointments online or by phone/email?
- What will your clinic hours be? What blocks of time will you begin with?
- What time off will you need to schedule? Do you need to take a week here and there? Or do you need to work around your children's school holidays? Are you going to vacation during the winter months?
- What time will you set aside for working *on* your business, like developing your marketing initiatives?
- How will you measure the cost-effectiveness of your promotional programs/tactics?
- What will your initial and ongoing expenses be? (Consider your annual licensing fee, overhead such as rent and utilities, your annual malpractice and liability insurance fees, bookkeeping fee, income taxes, and so on.)

Note that by forcing yourself to work through these questions, you might find that you need to adjust your mission and vision statements. The answers you come up with might identify an aspect of the business you had not thought of before. You need to remain flexible!



"You never know for sure what's going to happen. So don't assume that you should. Plan for several possible futures." Harry Beckwith

Bookkeeping

Keeping track of your finances may also seem to be a daunting task – one that you would rather avoid! But it is a necessary “evil” for a number of reasons:

- It will make it easier to file your income tax return every year that you are in operation.
- You can get a sense earlier of how much income tax you will need to pay.
- You will have accurate information to let you know when you reach the income level to start charging GST/HST or whatever local value-added goods and services tax you are legally required to charge.
- It saves time to keep on top of your bookkeeping and helps you avoid penalties and interest on late payments.
- It will help you stay legally compliant and prevent getting audited.
- You can avoid costly bank errors right away.
- Timely recording every transaction in an organized way helps ensure that you do not lose receipts and miss legitimate tax deductions.
- You can track whether your business is profitable, and by making year-to-date comparisons you will know whether it is growing, holding steady, or declining.
- It gives you valuable insights into your business, like where your money goes each month.
- Knowing your financial situation helps you make informed business decisions and helps you plan for the future.

Your bookkeeping system can be basic or more advanced (e.g., Quickbooks), depending on your needs and skills. You can research options online for setting up your system or engage the services of a qualified accountant or bookkeeper to set up a system that effectively keeps track of all your revenues and expenses. If your business is relatively simple, you likely can keep on top of your bookkeeping yourself. However, if you decide to retain a bookkeeper to maintain your financial records, you still need to understand the setup and entries in order to oversee the bookkeeper’s work. Ultimately, you are the one responsible to the government for your tax submissions.

For our purposes, we will look at a simple single-entry bookkeeping system that will probably suit most sole proprietor-run clinics. With this approach, you enter each transaction only once. Appendix C contains sample tables that you can adopt for your own use, depending on your business situation.

Let us look at the sample tables and how they might be filled in (these are not realistic as you would, hopefully, have more clinic days and clients!). The black entries are income to be added and the red entries are expenses to be subtracted.

If you are not legally required to collect and keep track of any GST, HST, VAT or other sales taxes, then the simple 3-column table may be all that you require:

Month: January Year: 2023

DATE	DESCRIPTION	AMOUNT
JANUARY 6	Session fee (Carol B.)	\$95.00
	Session fee (Nancy K.)	\$95.00
	Session fee (Derek S.)	\$95.00
JANUARY 15	Paper for printer	\$36.75
	Toner for printer	\$110.25
JANUARY 28	Session fee (Susan W.)	\$95.00
	Session fee (Harry R.)	\$95.00
	Session fee (Missy T.)	\$95.00
JANUARY 30	Closing Balance:	\$423.00

This is what your monthly accounts would look like if you were collecting 5% GST:

Month: January Year: 2023

DATE	TRANSACTION DETAILS	BASE AMOUNT	GST	NET AMOUNT
JAN 6	Session fee (Carol B.)	\$95.00	\$4.75	\$99.75
	Session fee (Nancy K.)	\$95.00	\$4.75	\$99.75
	Session fee (Derek S.)	\$95.00	\$4.75	\$99.75
JAN 15	Paper for printer	\$35.00	\$1.75	\$36.75
	Toner for printer	\$105.00	\$5.25	\$110.25
JAN 28	Session fee (Susan W.)	\$95.00	\$4.75	\$99.75
	Session fee (Harry R.)	\$95.00	\$4.75	\$99.75
	Session fee (Missy T.)	\$95.00	\$4.75	\$99.75
JAN 30	Closing Balance	\$430.00	\$21.50	\$451.50

These examples demonstrate how keeping on top of your financial situation in an orderly fashion very clearly shows you where you stand at the end of each month.

Of course, other expenses such as monthly bank fees, rent, and annual general and professional liability insurance fees would also need to be recorded.

It is wise to keep the expense accounts simple. For example, if you travel by car to do in-home sessions for clients who are unable to come to your clinic, then have only one car expense account and put all your receipts into it. Otherwise, it gets too complicated if you set up separate accounts for gas, repairs, insurance, registration, etc.

Here are some other suggestions to help you get started:

- Open a separate bank chequing account for all your business transactions. Do not use your personal bank account(s) for business.
- Get a separate credit card that you use only for business.
- Create folders for monthly bank statements and business receipts. Dropping each item into the appropriate folder will keep everything organized.
- Store your financial records in a secure filing cabinet.
- Set up a schedule to regularly work on your books. For example, once weekly or monthly record all your transactions for that week/month.
- Pick a time when your mind is fresh and not distracted. Looking at numbers when you are tired is more likely to lead to errors that will cost you in the long run to find and correct.
- Stick to your schedule. Do not procrastinate! Otherwise, you will fall behind and lose the benefits that timely bookkeeping provides for your business.
- If a bookkeeper is maintaining your records, you can have her visit on a bimonthly, quarterly, or biannual basis, depending on the number of transactions you routinely have - or you can take your folders to her workplace.



Organizing your business income and expenses effectively saves you time when you sit down to do your bookkeeping – time you can spend on other activities. Or if you have a bookkeeper do the work, being organized will save her time and thus reduce your fees.

Part 4

The Marketer

Once you have everything in place – your vision, mission, administrative policies, and business plan – you are ready to contemplate how you are going to let the world know about you and your clinical practice. Marketing is much more than simply advertising and selling. It consists of everything that you do to promote your business. And one thing is for certain: you have to do some marketing, especially at the beginning in order to be successful. There is no way around it.



As a matter of fact, it might seem that you spend an inordinate amount of time getting the word out to get your business started. This is not unusual. However, once people know about you and word of mouth takes over, your marketing strategy will need to change. This is one reason why you will need to monitor where your clients are hearing about you. Constant assessment of your promotional campaigns will guide you to making the most of your efforts, time, and marketing budget.

There are a number of things to consider as you begin the process of developing your marketing strategy.

Differentiate Yourself

Communicating how you are different from other practitioners and what makes your service different is the key to effective marketing. Think about how HelioSol is different from other modalities and what you offer that other HelioSol practitioners do not. You need to take a close look to find what makes you unique – and then capitalize on that.

“Go where others aren’t. Win without a fight.” Harry Beckwith

If you take this approach, you will not see other practitioners as competitors. You will still be distinguishing yourself from others by offering something slightly different, but at the same time you will be raising the public’s awareness of HelioSol. Remember that the better all HelioSol practitioners do, the better you do. Then it becomes a win/win/win situation!

Limiting Beliefs and the Elevator Speech

Many practitioners are reluctant to “toot their own horns.” They have a fear of talking about themselves. They do not like the idea of having to “sell” themselves. This problem can be overcome with a shift in perspective and some preparatory work.

The shift in perspective is to think in terms of what the public needs to know. Let them know what they will receive when they come to you. For example, they will be understood, respected, safe, and comfortable while having their life and health concerns addressed using a non-invasive energetic approach. They will have full control over what their bodyminds need in order to heal, in that their own inner wisdom will guide the process.

The preparatory work involves anticipating in advance the questions prospective clients will ask and preparing coherent responses. Then when someone asks “and what do you do?” you can respond with a well-rehearsed 30 or 60 seconds “elevator speech” where you briefly describe your services. This description needs to be in your own words so that it comes across naturally. Do not use terminology that you are uncomfortable with, because potential clients will pick up on that. The elevator speech needs to have a hook that draws attention, creates interest, and relates to the listener, as well as emphasizes what you do. Put your hook into the first sentence of your 30/60 seconds introduction.

If the person then asks a follow-up question, have a more detailed talk ready. You can adjust this talk to meet the specific needs of the person. For example, if they share the issue that is bothering them, you can incorporate that into your response to make the service you offer more relevant to that person.

This approach follows the principle of anticipating the potential client’s needs and directing your services to meet those needs. Preparing responses in advance will greatly increase your confidence and give new potential clients a good first impression.

If the person continues to show an interest, continue with an action. Depending on their level of interest, offer to set up an appointment, or at least obtain their email address and/or phone number so that you can be the one who takes the next step. You could email them some useful information and resources that addresses their needs. If available, you can send them an article that you wrote or provide a link to a video where you talk about a relevant topic. Most important, make sure you follow up with them afterwards!



If, however, the person's eyes glaze over after your elevator speech, maybe just hand the person your business card and/or brochure for future reference. Do not keep talking if the person shows no interest as that leaves a lasting bad impression of you. You need to understand the psychology of information overload.

If a potential client is not interested in a HelioSol session, do not get discouraged. Just let it go and move on! Do not be surprised if some of these people change their minds and approach you in the future.

Developing Your Brand



Branding is a way for clients and potential clients to identify, recognize and experience your business. It includes everything that defines your "personality," including your business name, the logo and tagline, the colours and fonts that you choose, your business cards, letterhead, website, and all your other marketing tools. Your brand should look, sound, and feel different than

anyone else's in order to distinguish you from the rest of the "crowd." It helps to employ a communication style, with a relevant message, that appeals to as many people as possible. For example, although many people are visual, others are more auditory or kinesthetic (feeling) in picking up information. Having something for everyone will attract more potential clients.

It is wise to keep your brand simple so that it is easily recognizable and understood. Make sure that once you have designed your look, that you use it consistently to facilitate brand recognition within the public, help clients remember your business, and create brand loyalty.

Choose your business name carefully. And, as mentioned earlier, research names you like to ensure they are not already taken. Once you have your name, try to add a catchy, inspiring tagline that will help people remember the name and encourage them to work with you.

Here are some examples of possible taglines:

- *Unleash your natural healing power.*
- *Just for the health of it!*
- *Access your inner healer.*
- *Preventative health for life.*

After the initial design for your brand has been developed, test it on a few people to make sure that it is conveying the message you want to get across.



Promotional Mix

There are many no cost, low cost activities you can do as part of your promotional strategy. Do as many of these that you can:

- Letting all your friends and relatives know what you are doing so that they can direct people they know to you.
- Using social media, blogs, and other online platforms to reach people both within and outside of your geographical and time zones.
- Conducting public talks with demonstrations. (You may consider joining a Toast Masters club first if you have a fear of public speaking!)
- Placing flyers on community bulletin boards.
- Writing articles or publishing a book.
- Conducting interviews with local community newspapers or other forums.
- Putting out a press release.
- Using client testimonials, either written or video, on your brochures and website.
- Handing out brochures and business cards (do not be stingy with these!).
- Joining business networking groups, either in-person (such as breakfast clubs) or online (on platforms like LinkedIn).
- Providing free introductory “meet and greet” appointments where you outline in more detail the benefits of coming to you.
- Including your business name, logo, tagline, and contact information on every email that you send out. You can even put the same information on your car!
- Offering to do sessions for a particular segment of the population as a community service.
- Directing people to your professional-looking website and/or Facebook page for information (like your articles, e-newsletters, or videos).
- Collaborating with others to reduce the costs of advertising (i.e., placing paid ads in newspapers, magazines, or on social media platforms).

Include a call to action whenever possible. For example, when doing a public speaking engagement, bring along your appointment book and offer an exclusive special rate for the attendees if they sign up for a session on the spot and schedule them in right away so they have the date and time confirmed.



A word about paid ads: Do not spend a dollar until you are clear on what you want the specific ad to accomplish! Then, depending on your skill set, you may need professional help to design an effective ad. The three essential elements are copy, layout, and the hook. Ads can be expensive, so you want to ensure you get the most “bang for your buck.”

An important part of your marketing plan will be target deadlines for accomplishing every step. That way you will be less likely to procrastinate!

Another important aspect of your marketing strategy is to measure the effectiveness of your campaigns. Consider using a spreadsheet to tell you what attracted your clients and where they are coming from. This is a quick visual way to assess which promotions are working and which ones are a waste of time, effort, and money. You can then modify your plan accordingly.

Client Retention

Client retention enables you to develop strong relationships with your clients and maximize their lifetime value to your practice. Besides returning for more sessions themselves, loyal clients are also likely to refer others to you. How effective you are at retaining clients also gives you a good measure of how successful you are at satisfying your current clients.

It takes less energy and is more cost-effective to keep current clients than to attract new ones, so it is important to develop a client retention strategy! You worked so hard to acquire new clients, so you want to ensure that they stay with you, have a great experience every visit, and continue to see the value of your services. Offering excellent customer service will encourage client loyalty. You want clients to feel confident that you are there to help them whenever they need you.

Do not take your clients for granted! Make them feel special.

One retention strategy is to keep yourself in your clients’ minds by sending out regular newsletters or emails. This can be accomplished by sending out birthday cards, e-newsletters, reminders about any upcoming public talk or other events, or by sharing information on relevant topics or about a resource you have found.



Survey your clients about their experiences with you – what do they think or feel about the quality of the service you provide? Are they satisfied? Do they have any suggestions for improvement? There is a sample client Survey for you in Appendix B. Just remember to be open to receiving constructive suggestions and following up on them if appropriate.

In the end, clients will be loyal to you for the same reasons that you are loyal to health professionals you seek when in need. Think about what it is that keeps you going back to your doctor, dentist, massage therapist, or chiropractor. Ask yourself what it is that you like or dislike about those service providers and objectively assess how you are scoring on those accounts with your own clients.

Social Media Marketing

More and more businesses are relying on social media to make up the bulk of their marketing mix. For this reason, the specific pros and cons of social media marketing deserve a closer look.

Social media includes social networking, blogs, micro blogging, podcasts, as well as video and photo sharing. Familiar internet applications and networking sites are: Facebook, LinkedIn, Google Plus, Twitter, Tumblr, YouTube, Vimeo, Flickr, TikTok, Instagram, Pinterest, Snapchat, Byte, Reddit – and there are more platforms being developed all the time.



Advantages of using social media in general are that it:

- Reduces advertising costs. There are no sign-up fees to start with most social media platforms (completely free) which is good for limited marketing budgets.
- Allows for easy change of content and you can do it yourself.
- Offers the option to run paid ads through the social media's own form of paid advertising.
- Enhances the reach as there are no geographical or time zone limitations.
- Reaches large audiences and you have direct access to the individuals.
- Provides unlimited information without human intervention which promotes brand awareness and builds brand loyalty.

- Allows consumers to voluntarily join or follow you. They may spread your information to their own networks enlarging the pool of potential new clients (a form of word-of-mouth).
- Drives traffic to your website by providing links. Once someone lands on your website they can learn more about you and your service. You can also get people to book their first appointment with you by having a self-scheduling system on the website.
- Allows for two-way communication since people can leave comments. This helps you gain insight into your potential clients and they let you know what they think of your service/brand.
- Allows for targeted marketing to people who are most likely to be interested in your services.
- Allows you to assess the success of your marketing strategy by using the social media's metrics, e.g., how many posts, likes, shares, follows, clicks, etc. you received.

The disadvantages in general are that:

- It can be time intensive and overwhelming because posts need to be made regularly to be effective. Consider finding someone to assist with the social media responsibilities.
- It is possible for trademarks and copyright to be violated by others thereby damaging your reputation or branding.
- You may get negative comments or reviews that have been posted or tagged and shared. These need to be responded to immediately to offset the damage.
- You may accidentally attract an embarrassing situation if something goes viral (e.g., if a post unintentionally infuriates someone). This could leave a negative perception of your business, even after time-consuming damage control efforts.
- It takes time to see results. You need to regularly post content over several weeks before you see any results.
- You may face potential liability if personal data collection, use, and maintenance policies are violated.

It is important to fully understand the risks and challenges of using social media to market your business – so, do your research before undertaking!

There is no single correct approach to designing your marketing strategy and you can always adjust it as you gain experience with what works and what does not work.

Advertising: Warning

When promoting your business, you need to remember that one of the quickest ways to fail is to aggressively promote a bad service – especially if your ads are effective and draw lots of clients! Do not be in too much of a rush to promote, until you have everything in place to provide an exceptional client experience. A bad first impression may be difficult to overcome. A different expression of this same idea is presented in this anonymous poem for advertisers:



A lion met a tiger
As they drank beside a pool
Said the tiger, "Tell me why
You're roaring like a fool."



"That's not foolish," said the lion
With a twinkle in his eyes
"They call me king of all the beasts
Because I advertise!"



A rabbit heard them talking
And ran home like a streak
He thought he'd try the lion's plan,
But his roar was just a squeak.

A fox came to investigate –
And found dinner in the woods.
Moral: When you advertise, my friends,
Be sure you've got the goods!



Getting the word out and attracting a lot of people to a flawed service is definitely an effective strategy for killing a service business. 😊 It is imperative that HelioSol practitioners remember that the foundation of service marketing is the quality of the service itself.

Summary

The keys to success are:

- Be yourself, come from the heart. Be professional and ethical. Build strong relationships with your clients.
- As Stephen Covey says: *“Begin with the end in mind.”* Know what you want to accomplish (vision) and what it will feel like when you get there. Be clear about your mission.
- Develop a plan with as much detail as you need to cover all aspects of developing a successful business.
- Set SMART goals that are well-defined.
- Market your business by focusing on the service to your client base.
- Execute and revise everything as necessary!

As Michael Gerber says, you should not only work *in* your business, you need to take the time to work *on* your business in order to grow it and be successful. This takes commitment:

“Until one is committed, there is hesitancy, the chance to draw back, always ineffectiveness. Concerning all acts of initiative and creation, there is one elementary truth the ignorance of which kills countless ideas and splendid plans: that the moment one definitely commits oneself, then providence moves too.

All sorts of things occur to help one that would never otherwise have occurred. A whole stream of events issues from the decision, raising in one's favour all manner of unforeseen incidents, meetings and material assistance which no man could have dreamed would have come his way.

Whatever you can do or dream you can, begin it. Boldness has genius, power and magic in it. Begin it now.” William Hutchison Murray



Suggested Reading

Beckwith, Harry, *Selling the Invisible: A Field Guide to Modern Marketing*

Covey, Stephen R., *The Seven Habits of Highly Effective People*

Gerber, Michael E., *The E Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It*

Hill, Napoleon, *Think and Grow Rich*

Kehoe, John, *Money Success and You: Harness Your Mind to Achieve Prosperity*

Light, Heidi, *Ethics in Energy Medicine*

Murphy, Midge, *Practice Energy Healing in Integrity: The Joy of Offering Your Gifts Legally and Ethically*

Paiva, Cidalia, *Keeping the Professional Promise*

Appendix A

Business Plan Outline

1. Executive Summary

Summary of plan – catch the excitement – do this last!

Include business concept, current situation, key success factors, financial situation/needs.

2. Background to business

Business description. Relevant background and industry information.

Mission and Vision statements. S.M.A.R.T. objectives, business structure.

3. Service

Service description – define what business you are really in.

4. Industry Analysis

Industry overview/trends. Barriers to entry and growth.

Competition analysis. Opportunities and threats.

5. Market Analysis

The overall market. Changes in the market. Market segments. Target market and clients. Client characteristics, needs, and buying decisions.

6. Marketing Strategy

Place and price. Word-of-mouth. Advertising. Publicity. Articles. Speeches.

Reward programs. Discounts. Coupons. Newsletters. Community service.

Networking. Measuring cost-effectiveness.

7. Management

Additional personnel and qualifications. Professional support.

8. Operations

Policies and procedures. Forms. Bookkeeping. Equipment. Contracts. Rent.

9. Financial Projections

Start-up, fixed and variable costs. Cash flow analysis. Assumptions.

10. Implementation Plan

Decision-making process. Critical path.

11. Risks and Assumptions

What could go wrong plus a plan to detect and handle the situations.

Scan the environment for controllable and uncontrollable factors.

Appendix B

Client Survey

I would appreciate receiving your feedback on my services by answering the following questions so that I may improve what I do to meet your future needs.

1. How did you find out about me?

Google Website Referral Other _____

2. Why did you choose me over another practitioner?

3. How would you rate the overall quality of the service you received from me?

Excellent Good Fair Poor

4. In your own words, describe how you feel about my sessions:

5. What can I do better to serve your needs?

6. How likely are you to recommend me?

Very likely Not very likely because: _____

7. Do you have any additional comments or feedback for me?

8. May I contact you to follow up on these responses?

No Yes Name: _____

Email address: _____ Phone number: _____

Thank you for your time!

Appendix D

The HelioSol Practitioner (HSP)

Code of Ethics

1. General Duty to Clients

The HelioSol Practitioner shall:

- Act in the best interest and well-being of the client, through the highest possible standard of professional practice.
- Refer the client to other health care providers when it is in the client's best interest to do so.
- Not take advantage of a client's vulnerabilities for the HSP's sexual, emotional, social, political, or financial interest or benefit.
- Not contravene the Human Rights Act or the Human Rights Code, as amended from time to time.
- Safeguard the client's right to privacy and confidentiality by holding all personal and health information in confidence unless otherwise required by law.
- Assist the client to comprehend information about how the HelioSol session is conducted and answer questions the client may have.
- Be responsive to a client's choice to accept, refuse or terminate a session.
- Not refuse to conduct a session unless the client asks the HSP to perform an illegal or unethical act; if there is incompatibility of character between the HSP and client; the HSP believes that the client's health concern requires another health professional's services; or the client fails to satisfy a statement of account for services rendered within 15 days or after 3 sessions.
- Provide a level of care that a reasonably prudent person would provide in a similar situation.

2. Sexual Conduct Prohibited

The HelioSol Practitioner shall not:

- Engage in sexual conduct with a client.
- Make any inquiry into a client's sexual history, unless such an inquiry is directly related to the concern being addressed during a session.

3. General Duty to the Public

The HelioSol Practitioner shall:

- Comply with all Federal, Provincial and Municipal laws and regulations pertaining to the business and practice of conducting HelioSol sessions.
- Act in an honest, professional and courteous manner towards all persons regardless of age, race, culture, creed, sexual identity, gender, ableness and/or health status.
- Pursue continued career-long, professional learning.
- Collaborate with members of other health professions to meet the health needs of the public.

4. General Duty to the Professions

A HelioSol Practitioner shall uphold and advance the honour, dignity and credibility of the profession and, without limiting the generality of the foregoing, shall:

- Use knowledge and skill to improve the health and well-being of others.
- Respect the honour, dignity and credibility of other health care professionals.
- Promote harmonious working relationships with other health care professionals.
- Refrain from undue criticism of the qualifications or the modalities provided by other HSPs.
- Avoid competition for clients or professional services by methods that adversely affect the honour, dignity or credibility of the profession.
- Avoid comparing her/his competence or client outcomes to those of other HSPs.
- Refrain from entering into a contract with any person or organization that diminishes the honour, dignity or credibility of the profession.

5. Reporting of HelioSol Practitioners

A HelioSol Practitioner shall promptly file a written report to the Creator of the HelioSol System if she/he has reasonable grounds to believe that another HSP has:

- Committed an act of professional misconduct such as abuse of a client physically, verbally, sexually or financially.
- Engaged in sexual conduct with a client.
- Conducted sessions while the HSP's ability to do so was impaired by drugs, alcohol, a physical or mental ailment, emotional disturbance or addiction to any substance.
- Engaged in any unsafe, unethical or illegal activity related to the practice of HelioSol.

- Permitted her/his office or clinic to be used for an unlawful purpose.

The report shall contain the following information:

- The name of the HSP filing the report.
- The name of the HSP who is the subject of the report.
- Details of the alleged professional misconduct, prohibited sexual conduct, incompetence, or incapacity, including the sources of information relied upon.
- The identity of any client involved, after the HSP has obtained the client's consent to disclosure of the client's identity to the Creator of the HelioSol System.

6. Guarantees of a Cure Prohibited

A HelioSol Practitioner shall not claim that a session will provide a cure, nor shall an HSP guarantee therapeutic value to a client.

7. Practising If Impaired Prohibited

A HelioSol Practitioner shall not conduct a session when the HSP's ability is impaired by drugs, alcohol, a physical or mental ailment, emotional disturbance or addiction to any substance.

8. Conflict of Interest

A HelioSol Practitioner shall make every effort to avoid a conflict of interest while conducting sessions or carrying out any other professional duty. Notwithstanding this, where an HSP is in conflict of interest with a client, that HSP shall:

- Immediately disclose the nature of that conflict to the client.
- Document this disclosure.
- Resolve the conflict of interest in consultation with the client, whether by terminating the therapeutic relationship with the client or otherwise.

Appendix E

Breaching Confidentiality

Confidentiality can be broken for the following reasons:

1. Threat to Self
2. Threat to Others
3. Suspicion of Abuse

Duty to Warn

Duty to warn refers to the responsibility of a counselor to breach confidentiality if a client or other identifiable person is in clear or imminent danger. The police and the victim must be notified. Only notifying the police is not sufficient to protect from a lawsuit.

The duty to warn also refers to a client who is a threat to self. For instance, if a minor says that he/she is going to commit suicide, it is the practitioner's responsibility to contact the parents/guardians and not leave him/her alone until the parents arrive.

In addition to having a valid reason to believe the client is a danger to self or others, the following 3 principles are applied when assessing duty to warn:

Foreseeability of harm (e.g., a verbal threat to an identifiable victim).

Identifiability of a victim.

Feasibility of intervention.

If you are working with a client and feel that the above three criteria are met, it is important to document everything that happened. Make sure to document who you spoke to, what you said and the date and time.

Information adapted from:

<http://www.4therapy.com/professional/research/lawandethics>

Duty to Report

The duty to report applies to anyone who has reason to believe that a child has been or is likely to be abused or neglected, or may need protection, to promptly report the matter to a child protection worker.

- Child abuse can be emotional, physical, or sexual and includes neglect, abandonment, and failure to meet the needs of a child.

The duty to report overrides the rules of confidentiality.

Even if you believe someone else is reporting the abuse, you still have a legal obligation to report. If you do not report the abuse, you are liable.

Report the incident immediately. The child's safety is at stake.

DO NOT contact the alleged perpetrator. This is the responsibility of the police or the child protection worker.

How to Report: Contact the appropriate governmental department or agency. Ask to speak to someone. Do NOT leave a message and assume that someone will follow up. Keep calling until you speak to someone in person.

The report should include the following:

- your name and contact information (it will be kept confidential)
- the child's name and age
- the location of the child
- your relationship to the child
- any immediate concerns you have about the child's safety
- information on the situation including all physical and behavioral indicators observed
- information about the family, parents, and alleged offenders
- other child(ren) who may be affected, if known.

For your records, record the name of the official person you spoke to, the date and time that you made the report.

Information adapted from: http://www.safekidsbc.ca/comm_report.htm

About Sylvia Muiznieks



For almost three decades, Sylvia Muiznieks has had extensive experience in the complementary health field as a practitioner, educator, and administrator.

Sylvia earned a BSc in Kinesiology and Health Studies from the University of Waterloo in Ontario, Canada. Sylvia taught anatomy & physiology and advanced massage technique courses in the Mount Royal University massage therapy program in Calgary and she subsequently was the Administrator of the Centre for Complementary Health Education at Mount Royal University for 9 years. Sylvia became a Certified BodyTalk Instructor in 2002 and a MindScape Instructor in 2003. She has taught extensively throughout Canada and the world. She retired from teaching IBA courses in January of 2021.

In 2017, Sylvia developed the HelioSol Technique and then the HelioSol System. She continues to expand the courses for the HelioSol work to make the information available to practitioners of other alternative health care modalities as well as to people with no health background.

Sylvia maintains a busy clinical practice in Cochrane, Alberta, and has many distance clients throughout the world.

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About Vilnis Muiznieks



Vilnis has had experience in both the public and private sectors, in a variety of positions including pharmacist, bureaucrat, hospital administrator, and small business consultant. His educational background includes a BSc in Pharmacy (University of Toronto), a Master in Health Administration (University of Ottawa), and a Marketing Management Certificate (University of Calgary).

As a self-employed consultant, Vilnis created practical business solutions for the planning, management, and marketing challenges of his private health care practitioner clients. He has coached many entrepreneurs in the development and implementation of their business plans.

Over the past two decades, Vilnis has helped Sylvia build a successful business (Innate Healing Inc.) using the principles that are presented in this course.

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