

# Be Well!

## A wellness plan to keep you and your coaching business healthy

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**N**ow that the first half of the year is complete, have you thought about your business goals for the rest of the year? Are you on track with those goals? And, have you thought about what you need to do if you aren't? Chances are you created a strategic business plan prior to the New Year and whether or not you've looked at it, you know you have one. It is common to put effort into the task of creating a plan only to cast it aside and disregard it.

According to the National Wellness Institute, "Wellness is an active process through which people become aware of, and make choices towards, a more successful existence."

In order for your business to remain healthy and vital, it is sometimes necessary to take a step back and re-evaluate where you've been and where you want to go. As you do this, it is important to take into consideration what worked and what did not, and why or why not. Although planning for each year typically takes place in the fourth quarter of the previous year, it is helpful to continually evaluate each quarter to ensure you haven't lost sight of those goals thereby negatively affecting the health of your company.

Here are five areas to consider when creating your company wellness plan. For each category, ask and answer the questions so as to recognize the pains or challenges that can be incurred with each as well as how to resolve them.

**Staff:** Do you have sufficient staff to run your operation? Is the work environment productive or destructive? What is your absenteeism rate? As a manager, are you respected or feared?

**Clients:** Do you have loyal clients who continue to patronize your business as well as refer you to others? Or, do you struggle to meet revenue goals due to always



needing to focus on client retention, recruitment, and satisfaction?

**Operations:** Do you have business processes set in place? Are they streamlined to be cost-effective with little to no risk? Is your entire staff aware of these processes and compliant with them?

**Financials:** Do you operate within a budget? Have you considered the life cycle of your company (young and growing versus mature and established) when plan-

ning expenses and revenue?

**Overall Strategy:** Have you set goals for your company, whether it's to grow, remain stable, or prepare to sell if retirement is a consideration?

The quality of your company's wellness today is in direct correlation to the decisions you made in the past. The assessments you make today and onward will determine its future wellness. When you choose to plan and then make the conscious choice to act on that plan, you will manifest your intentions and your

you know your behavior is dependent on your thinking and whatever intentions you set today and in the future will determine the quality of your wellness going forward. Life is about making choices. When you believe in your choices, you will grow. When you grow by defining your intentions and health goals, you will achieve. When you achieve your health goals, you will discover a new dimension of wellness both personally and professionally.

We live in what I believe to be a "sick-care" society: being reaction-

outlined above (staff, clients, operations, financials, overall strategy).

**2. Intentions:** Pulling from your vision list, specify intentions that you and your company will accomplish over the next 12 months. Consider the "what's in it for me" of your customer while always keeping in mind the realistic capability of you meeting those needs while maintaining your own health.

**3. Values:** Prioritize the corporate values you will be honoring by bringing your intentions to fruition. By honoring these values, you will strengthen the overall integrity of your company and staff.

**4. SMART Plan:** What goals and objectives (Specific, Measurable, Attainable, Relevant, and Timely) must be achieved in order to fulfill your intentions without compromising your values? Make sure you have the necessary resources (tangible and intangible) to sustain this SMART plan.

**5. Actions/Tasks:** Create a prioritized list of action-oriented tasks to complete your intentions for the year. You might even consider doing this in the form of a 'vision board'. Share them with your entire staff so everyone knows the plan and their role in it. If you are on your own, share with your coach or mastermind group to hold you accountable. Break them down into daily, weekly, monthly, quarterly and yearly segments, if appropriate. Check in regularly to ensure everything is on your chosen path. If not, adjust and continue. If so, congratulate yourself (and your team) and keep moving forward!

Be present, be purposeful, and be well.

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company will healthfully thrive.

However, for your company to healthfully thrive don't forget one major component: you. Often coaches find themselves suffering from compassion fatigue, giving so much of themselves to their clients and running empty when it comes time for self-care. How often do you feel like you're on autopilot? Are you always tired and stressed beyond your limit? Do you struggle to balance the demands of work and family, feeling that if something doesn't change you're simply going to break?

Just like in your business, the quality of your wellness today is based on your past behavior. As a coach

ary when it comes to our health. Therefore, so as not to jeopardize your wellness, it is up to you to manage your own care. And when you are an entrepreneur, as most coaches are, learning to be proactive is essential to keeping you and your coaching business healthy.

Here are five steps to a successful coaching business wellness plan that are applicable to creating a business plan for your personal wellness too.

**1. Vision:** What is your vision for you and your company? Take some time to list what you most desire to achieve and/or experience. If applicable, divide this list into sections taking into account the areas