

# Building Your Systems

## Chapter 5: Business

Systems allow you to find redundancies and time wasters in your work and streamline them to free up time for other activities. In Chapter 5 of **Change Maker** we talk about how you can build a few simple systems, without being a systems engineer. After reviewing those suggestions, consider the following.

### STEP 1

#### Create a “General” file

You’ll need a list of the communications you use repeatedly. For a standard coaching business, this may include:

- information about services and pricing
- welcome messages
- reminders about upcoming sessions
- post-session check-ins
- monthly “How’s it going?” messages
- regular “You’re doing great” messages
- requests for data like weight, measurements, blood work, etc. ads and marketing materials

What categories of communications (info about services and pricing, welcome messages, reminders about upcoming sessions, post-session check-ins, etc.) do you use regularly?

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Once you have your categories in mind, write the content itself. You’ll probably want to do this on your computer so you can save your own templates and paste in content from emails, brochures, or other material you’ve already written. Depending on the nature of your offerings, and how often you like to check in with clients, there might be a lot of things to document. That’s okay; take a few weeks to get this done. Don’t rush; do it right.

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### STEP 2 Create a “Programs” file

Whatever services you offer, you undoubtedly have to deliver them (and communicate about them) over and over. These communications might include:

- intake questionnaires
- workout plans (weight loss)
- workout plans (weight gain)
- workout plan FAQs
- meal plans (weight loss)
- meal plans (weight gain)
- meal plan FAQs
- meal-planning strategies
- supplement guidelines (weight loss)
- supplement guidelines (weight gain)
- supplement FAQs
- body-measurement guidelines

What categories of programs/deliverables (intake questionnaires, workout plans, eating plans, supplement guidelines, etc.) will you be using?

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Again, capture these on your computer for easier copy/paste later.

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### STEP 3 Create an “Emails” file

Go through a couple months’ worth of “sent mail” messages and look for patterns. In the seeming hodgepodge of your communications with clients, there are probably repetitions. Typically, coaches send lots of messages about:

- nutrition, workouts, and supplements
- sleep, and stress management
- travel and schedule-change challenges
- meal-planning challenges
- questions about nutrition basics
- general anxieties about life/goals/programs/progress

Which emails are virtually the same? What categories of emails (nutrition/exercise/supplement discussions, sleep/stress-management discussions, travel/schedule discussions, general anxieties about life/goals/progress discussions) could you capture for easy copy/paste later?

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In a new document, make a list of your email categories. Under each category heading, paste in your best email on the topic, and tweak/perfect it as necessary.

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#### **STEP 4** Create a Master Folder

Save your “General,” “Programs,” and “Emails” files in one easily accessible folder. Now you have a master database of the most common things you’ll need to type out. You can pull from it when it’s time to reply to questions, to send programs, or proactively reach out.

#### **STEP 5** Remember to personalize

By the time you pull information from your Master Folder and paste it into a new document, email, or text message, you’re 90 percent done. The other 10 percent? Customizing for the specific person.

To do this, start with a friendly greeting and a sentence or two about how they’re doing, what they’ve been up to, etc. Then personalize your standard reply based on their situation. After that, sign and send.

These activities and worksheets are taken from the book **Change Maker**: Turn your passion for health and fitness into a powerful purpose and a wildly successful career by John Berardi, PhD.

Check it out at: [www.changemakeracademy.com/book](http://www.changemakeracademy.com/book)